Reporting Tool Guide

Entering the Site

The BIIS platform uses single sign-on technology, so once you are logged onto the NBOA website (https://www.nboa.org/home), you will be able to enter BIIS without additional credentials (click on “BIIS” at the top of the NBOA website, then click “Login” in the upper right hand corner of the BIIS landing page). You can also enter BIIS directly at https://biis.nboa.org/ and use your NBOA website credentials. When you arrive at the BIIS platform, you will see the member landing page (see Figure 1). To logout, click on the image of the person in the upper right-hand corner and then on “Logout.”

Figure 1. BIIS Landing Page

Access for School Employees

The prime contact (or primary contact) for BIIS is the person to whom the NBOA dues invoice is sent, usually the chief business officer at the school. The prime contact can give permission to see (“read”) and/or enter (“write”) data to colleagues via the School Admin page. To access that page, the prime contact will click on the image of the person in the upper right-hand corner and then on the words “School Admin.”

The prime contact will see a list of the individuals at your school. Click on the Edit Permissions button and then check boxes will appear for each of the individuals listed. The prime contact has permission to read and write all data and may edit other school personnel’s ability to either read data only or to read and write data. The initial setting is that everyone listed on the school’s roster has the ability to read the standard (or financial) data. The Confidential Data is the compensation related data. The ability to read and/or write confidential data is initially only available to the prime contact at the school. The prime contact may grant access to others at the school to read and write confidential data, and this access should be limited to the Primary Contact, the Head of School and Human Resources Director or your Payroll/Benefits person.
Reporting Tools

The data available in the reporting tools is available to the extent that your school has participated in the BIIS data collection. For example, if your school did not participate in the most recent year’s data collection, then you will not be able to access the information from the current year, even if your school has participated in prior years’ data collection. You will be able to access the prior years’ information in this case.

Creating Peer Groups

Click on the Reporting Tools tab (see Figure 2) and you will come to the Peer Group Page. This is where you may create peer groups/cohorts of schools to use with the benchmarking tools and the Financial Dashboard. These peer groups are linked to the member and cannot be shared within the school. Compensation data must have a minimum of ten (10) schools reporting a data point for the year for the information to be displayed. The letter “Y” under a year indicates the school participated in the BIIS data collection for that year. For years 2016 and prior, a Y indicates the school participated in at least one of the NBOA surveys in that year, so there is some data, but not necessarily all the data.

Figure 2. Reporting Tools Tab

To create a peer group (see Figure 3):

- Click on the blue box in the upper left-hand corner to create a new peer group (“New Group”).
- Type the name of the group into the box and select “OK.”
- Select the peer group name from the dropdown menu.
- You may narrow your possible school selections by using the filters at the top of the page (e.g., region, state).
- Once you have the list of schools down to something reasonable for you to work with, select the schools you wish to have in the group by clicking in the circle next to the school’s name. Clicking on the circle again will remove the school from the group.
• You will see the number in parentheses, next to the peer group’s name, increase (or decrease) as you select and deselect schools.
• You may edit the peer group name using the pencil icon next to the peer group name once you have selected it from the dropdown menu.
• To see just the schools that are in a previously created peer group, click on the circle below the peer group name (green arrow).

Figure 3. Creating a Peer Group
Benchmarking Reports

To see the tables and graphs, click on the Charts tab (see Figure 4).

To initially select data to view, select the area of interest using the down arrow on the left hand side of the item, then select a data point from the list.

Figure 4. Charts Tab

![Chart Tab Image]

To change the data point you are viewing, click in the Topics box (see Figure 5). This will generate a window listing the data points (see Figure 6). You may use the search box at the top of the window as well as scroll through the list. Clicking on the data point will select it.
Figure 5. Topics Box

Figure 6. Selecting a Data Point for Charts
Once you have selected a data point, you will be able to use the filters as well as select the chart type using the drop-down boxes near the top of the screen (see Figure 7).

**Figure 7. Filters in Charts**

- Switch between Peer Group and Percentile reporting using the “View By” drop down menu.
- Switch between bar charts and longitudinal trend charts using the “Chart Type” drop down menu. Certain data points will have a pie chart option.
- Switch between any of the filters by selecting “All” then selecting the new filter.
- Certain data points will have a modifier option which allows you to create ratios with the data point.

To download the chart or the table on the screen, click on the circle with the arrow pointing down onto the box on the far right.
**Calculated Metrics**

The Calculated Metrics tab in the Reporting Tools section allows you to see the calculations for the Financial Position Survey (FPS) Ratios and the Composite Financial Index (CFI) as well as the FPS range table (see Figure 8).

**Figure 8. Calculated Metrics Tab**

Clicking on the FPS Ratios and CFI Calculation tabs will bring up tables that provide the calculations for the various ratios of the two tools. The values displayed on the screen may be downloaded using the download button on the right-hand side of the screen.

The FPS Range Table tool (see Figure 9) provides a list of the ratios calculated in the Financial Position Survey, your school’s ratios and how you compare to other schools who have participated in BIIS. At the top of the page there are filters which will allow you to narrow the results so you may compare to other similar schools. The values displayed on the screen may be downloaded using the download button on the right-hand side of the screen.

**Figure 9. FPS Range Table**

If not enough schools in the selected filters reported data, you will see a “Not Enough Data” message. Click “Continue” and adjust your filters. The “School Count” column on the far right indicates how many schools are included.
Dashboards

The Dashboards tab gives you access to the CFI Calculator and the NBOA Financial Dashboard. Both are presentation ready reports that you may download in PDF format and print. The CFI Calculator and Financial Dashboard both have links to the NBOA website where you can access more information about the two reports, including video tutorials, which will assist you and your Board in using them. Click on the “Get More Information” button.

The Financial Dashboard report allows you to use the peer groups you have set up to compare your school’s performance to the median of the peer group (see Figure 10). On the right-hand side there is a drop-down menu that says Percentiles when you first access the report. Click on the arrow and the list of your peer groups will appear so you may select the one you want to use. The results will be displayed as the median line in orange.

Figure 10. Selecting Peer Groups in the Financial Dashboard

To print the CFI Calculator and Financial Dashboard reports (see Figure 11), access the Chrome browser menu in the upper right-hand corner of your screen (indicated by the three vertical dots). Select the “Print” menu item. For best results, save the report as a PDF file to your computer before printing.

Figure 11. Printing CFI Calculator and Financial Dashboard Reports

Have Questions?

Thank you very much for participating in NBOA’s research efforts. Please contact Mary Kay Markunas, marykay.markunas@nboa.org, 202-407-7135 or Elizabeth Dabney, elizabeth.dabney@nboa.org, 202-407-7149 if you have questions.