Benchmark Analytics

New Self-Service Features
for User Creation and
Organization Management

FEATURE UPDATE

What's New

Bulk User Import

You can now add groups of new Benchmark users from a .CSV instead of adding one-by-one or reaching out to support.

New Organizations Profile Functionality:
Display and Export Active Employees

We have added new sections to the Organization Profile that list Active Employees. You can view all employees associated with an organization and export this list. For users that manage multiple organizations, we have also added the ability to export a list of all organizations.

Delete Custom Table Data

Users with the ability to add records to tables like equipment and certifications can now delete records that have been added in error. (Note: this release excludes deleting records in the Employment History table, which will be included in a future release.)
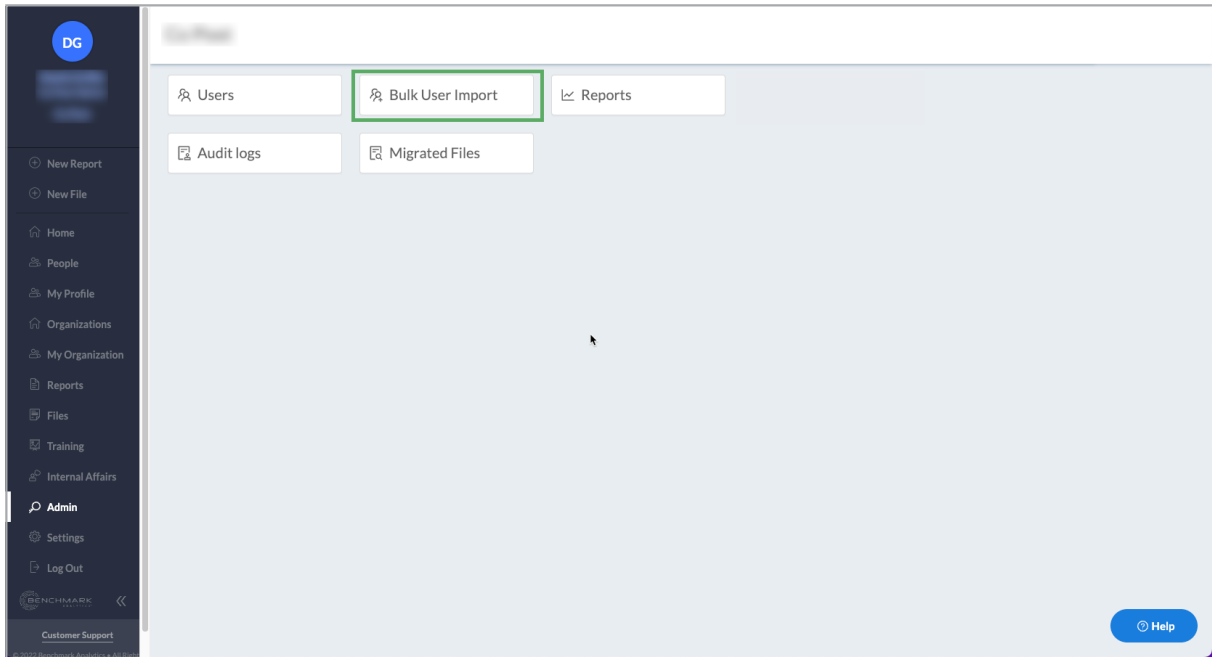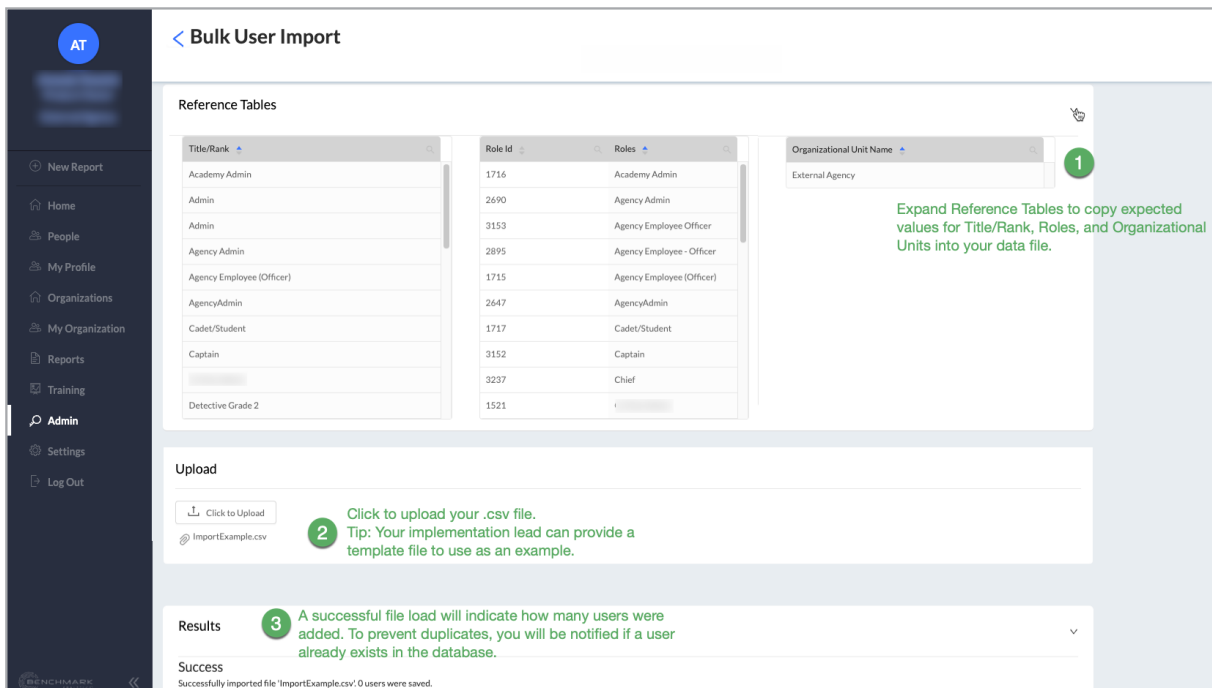
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Bulk User Import Instructions:

1

2

1 Expand Reference Tables to copy expected values for Title/Rank, Roles, and Organizational Units into your data file.

2 Click to upload your .csv file.
Tip: Your implementation lead can provide a template file to use as an example.

3 A successful file load will indicate how many users were added. To prevent duplicates, you will be notified if a user already exists in the database.

Success
Successfully imported file 'ImportExample.csv'. 0 users were saved.

Delete Custom Table Data Instructions:

1

Employment   Add Record

Personal Info

Comment   Add Record

Comments	Action
Dan is expected to be out for Parental Leave at some point in 2022Q4	Details
Courtesy officer for Spring Hill Apartments Jan 2021-Dec 2021	Details
Dan is expected to be out for Parental Leave at some point in 2022Q4	Details

Total number of records: 3

1 Within your custom table, locate the entry to delete. In this example, we've added the same comment twice by mistake.

2 Click Details to open it for editing.

2

Comment

Comment ✕

Dan is expected to be out for Parental Leave at some point in 2022Q4

ⓘ *Changes to this section **are not saved** until you **Save** on the main page.*

3 Click Delete

Delete   Cancel   Apply changes

Total number of records: 3

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New Active Employees Section in Organization Profile

This new section allows you to see all employees associated with an organization. You can also export this list to a .CSV.

Name	Phone No.	Website	Parent OU	

Export CSV

You can now export a list of all organizational units in your hierarchy from the Organizations page