



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.)

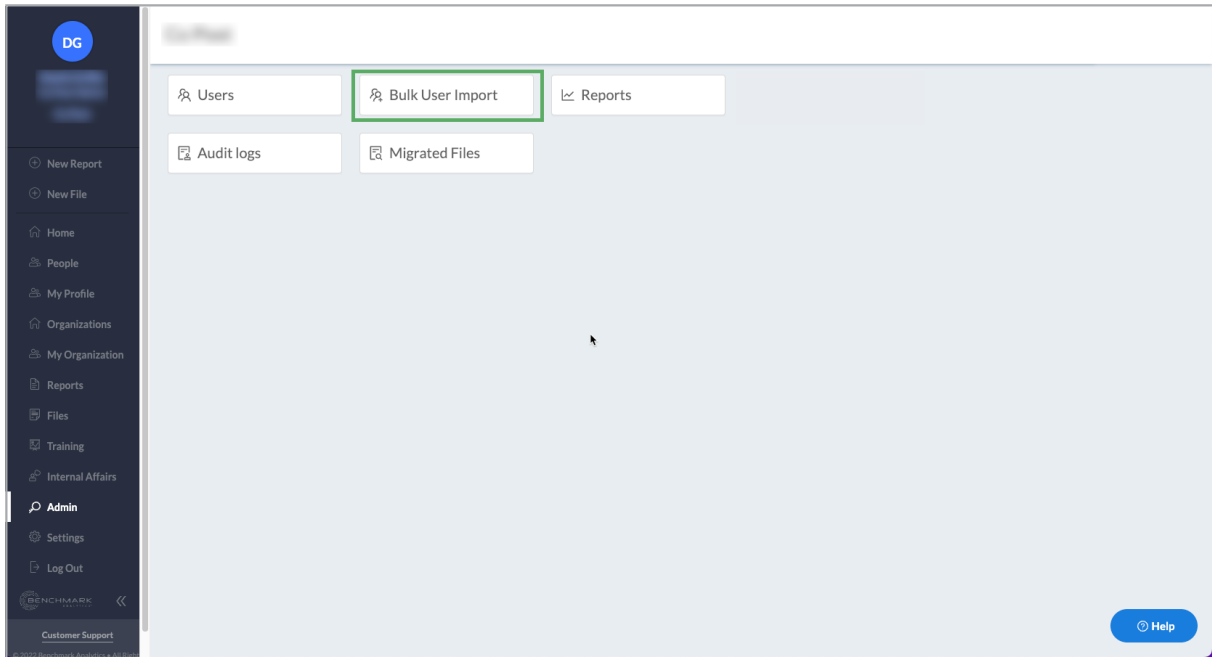


Release Date: June 2022

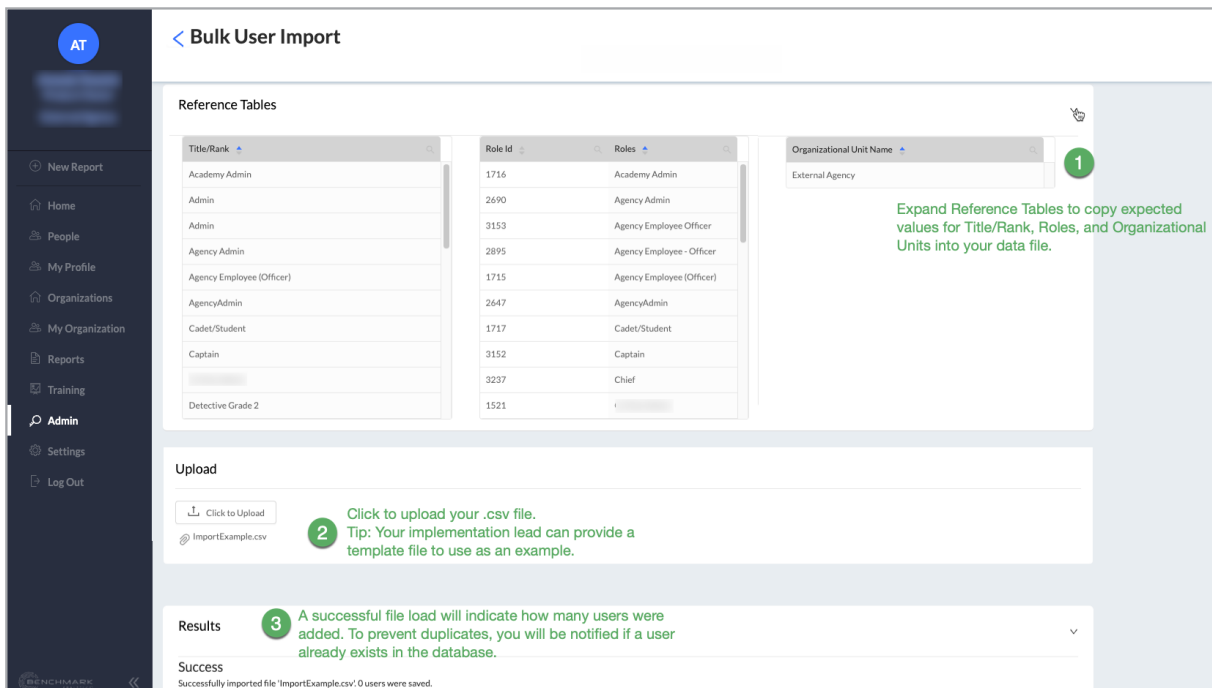
BULK USER IMPORT

Bulk User Import Instructions:

1



2



DELETE CUSTOM TABLE DATA

Delete Custom Table Data Instructions:

1

The screenshot shows the 'User Profile' page with a sidebar on the left containing navigation links like 'New Report', 'New File', 'Home', 'People', 'My Profile', 'Organizations', 'My Organization', 'Reports', 'Files', 'Training', and 'Internal Affairs'. The main content area has sections for 'Employment', 'Personal Info', and 'Comment'. The 'Comment' section contains a table with the following data:

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

Annotations on the screenshot:

- 1**: Points to the first entry in the 'Comments' table.
- 2**: Points to the 'Details' link for the first entry.
- 3**: Points to the 'Delete' button in the modal.

Text overlay: 'Within your custom table, locate the entry to delete. In this example, we've added the same comment twice by mistake.' and 'Click Details to open it for editing.'

2

The screenshot shows the 'Comment' details modal. It contains a text area with the comment 'Dan is expected to be out for Parental Leave at some point in 2022Q4'. Below the text area, there is a message: 'Changes to this section are not saved until you Save on the main page.' At the bottom of the modal, there are three buttons: 'Delete' (red), 'Cancel' (grey), and 'Apply changes' (blue). A green circle with the number '3' points to the 'Delete' button.

ACTIVE EMPLOYEE LIST

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.

The screenshot shows the 'Organization Profile' page for an 'External Agency'. The left sidebar contains navigation links: Home, People, My Profile, Organizations, My Organization (selected), Reports, Training, Admin, Settings, and Log Out. The main content area has a 'Last updated: 06/16/2022, 16:42:22' timestamp and a 'Save' button. The 'Active Employees' section is highlighted with a green box and a callout bubble stating: 'The list of Active Employees is collapsed by default. Click the arrow to expand.' Below this, the 'Documents' section is visible with an 'Add Document' button and a table header for Description, File, Document Type, Uploaded, and Action. The table currently shows 'No Data'.

The screenshot shows the 'Organization Profile' page with the 'Active Employees' section expanded. The list contains 10 employees. A green box highlights the 'Export CSV' button, and a callout bubble indicates the list is expanded. The 'Documents' section is also visible at the bottom.

Name	Title	Benchmark Id	Organizational Unit Name(s)	Certified	Email
Adam Telles	Engineer	ba-01011990	External Agency	no	adam.telles@externalagency.gov
Angela Test	Officer	un-ID202206142	External Agency	no	angelatest@agency.gov
Bethany Test	Officer	ef-ID202206149	External Agency	no	bethanytest@agency.gov
Carl Test	Non-Certified Other	ur-ID202206152	External Agency	no	carltest@agency.gov
Carmen Test	Officer	hk-ID202206145	External Agency	no	carmenest@agency.gov
Christopher Test	Officer	jz-ID202206146	External Agency	no	christophertest@agency.gov
Frank Test	Non-Certified Other	gg-ID202206153	External Agency	no	franktest@agency.gov
Javier Test	Officer	tr-ID202206148	External Agency	no	javiertest@agency.gov
Latoya Test	Officer	gx-ID202206143	External Agency	no	latoyatest@agency.gov
Lloyd Test	Non-Certified Other	nx-ID202206151	External Agency	no	lloydtest@agency.gov

ORGANIZATION LIST EXPORT

[illegible]