



## Set up Managers and Direct Reports

Although the org chart application is a stand-alone feature, it works alongside the People application to demonstrate organisation structure.

In order to make sure the information the org chart is receiving is correct we will need to make sure this information is set up in the People application first.

**Please note** that if you are using LDAP then the following steps do not apply as this can be automatically configured at the point of LDAP synchronisation

If you are not using LDAP you can update the user's manager by:

### 1. Making manual updates per user

An application administrator of People can make the required changes from the admin side (Applications > Admin > People)


Admin / People Control Panel						
<a href="#">Users</a> <a href="#">Power users</a> <a href="#">Roles</a> <a href="#">Groups</a> <a href="#">Password policy</a>						
Name: <input type="text"/> <input type="button" value="Q"/>						
All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z <input type="button" value="First name, Surname"/>						
Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare
	Abigail Clark	none	Human Resources, Company, Learning and Development	Yes	Yes	<input type="checkbox"/>
	Alan Metcalfe	none	Sales, Company	Yes	No	<input type="checkbox"/>
	Alison Kelly	none	Human Resources, Company	Yes	Yes	<input type="checkbox"/>
	Amelia Jackson	none	Human Resources, Company	Yes	Yes	<input type="checkbox"/>
	Anne Wilkins	none	Professional Services, Company	Yes	No	<input type="checkbox"/>
	Austin Glover	none	Marketing, Company	Yes	Robert Reith	No <input type="checkbox"/>

Select a user and navigate to the 'Org Chart' tab.

Admin / People Control Panel / Edit user info

[Edit user information](#)
[Role](#)
[Group](#)
[Org chart](#)
[Other settings](#)

**User code**   
**Last time login** 17-03-2018 16:08  
**Account state** ☒ Enabled ☐ Disabled  
**Assign user to extranet area** Primary Area  
**Username\*** abigail  
**Password**  ☐ Generate random password  
(if you want to change it)  
**Confirm Password**   
**First name\*** Abigail


[Change image](#)  
[Delete image](#)  
☒ Email log-in details

From here you can specify the user's manager and their direct reports.

You can only select one manager but you can add as many direct reports as necessary as this field is stating which other users are managed by the user currently being edited.

Any users who have been added as a direct report will automatically have their manager field populated in their own profiles and any manager specified has those users added to their direct reports.

Admin / People Control Panel / Edit user info

[Edit user information](#)
[Role](#)
[Group](#)
[Org chart](#)
[Other settings](#)

**Manager** Pippa Fraser    
**Direct Reports**  Alison Kelly  Amelia Jackson   
[View general org chart settings](#)

Once you are happy with the structure for these users simply press update and their org structure will be saved.

Repeat this process for other users as required bearing in mind that each direct report and manager field you populate will also fill up the others user's opposite fields.

## 2. Making changes en masse via CSV

To make bulk updates an application administrator of People can import new user information via CSV.

This is achieved by matching up the appropriate manager to their direct reports by specifying their user ID in the correct user rows.

This requires first making an export of all users and their IDs:

Admin / People Control Panel / Users Export

Keywords  All words  
 Role All Extranet area All  
 Group All ☐ With subgroups  
 Results per page 10  
 Fields Username First name Surname ID  
 CSV delimiter ☐ Semicolon (,) ☒ Comma (,)

Username	First name	Surname	ID
admin	Claremontis	Administrator	1

Click 'CSV' to download the information.

Next create a second export of username, first name, last name and manager ID - this will be the file that is imported to update user profiles.

Admin / People Control Panel / Users Export

Keywords  All words

Role  All

Extranet area  All

Group  All ☐ With subgroups

Results per page  10

Fields  Username  First name  Surname  Manager ID

Edit list

CSV delimiter ☐ Semicolon (;) ☒ Comma (,)

Filter Print CSV Reset

Username	First name	Surname	Manager ID
admin	Claromentis	Administrator	

Now for each user in the second CSV locate their appropriate manager listed in the first CSV and use the ID shown against them in the second CSV against all their direct reports.

Repeat for all users in the CSV.

Once done you will have something like the below in the second CSV:

users_20230126			
username	firstname	surname	manager_id
admin	Claromentis	Administrator	16
jennifer	Jennifer	Langdon	29
pipa	Pippa	Fraser	37
vanessa	Vanessa	Wright	23
stephanie	Stephanie	Hunter	11
victor	Victor	McLean	11
jason	Jason	Reid	215
jacob	Jacob	Black	14
claire	Claire	Bond	11
connor	Connor	Chapman	11
anne	Anne	Wilkins	200
dan	Dan	Butler	10
james	James	Terry	12

Those with the same manager ID entered against them, have the same manager.

Once complete save the CSV and now head back to Admin > People to import it:

claromentis

What are you looking for?

14:34

Home Company Department Dashboards Forms Learning Projects Room Booking Book a Demo

Admin / People Control Panel

Users Power users Roles Groups Password policy

Utilities

Add a new user

Export users

Add/update from CSV file

Configuration

General configuration

Configure user profile fields

Configure Skills

Photo	Full name	Role	Group	Dummy User Account	Assigned	Spare
	Abigail Clark	Administrators	Company, Human Resources, Learning and Development, Support	Yes	Yes	<input type="checkbox"/>
	Alan Metcalfe	none	Company, Sales	Yes	No	<input type="checkbox"/>
	Alice Johnson	none	none			<input type="checkbox"/>

Upload the file and process it, on the next screen select the 'update' column to ensure those users have their information changed, click 'confirm submit' to run the import:

Admin / People Control Panel / Mass add/update users

Status value can be: Error, New, Update, Old.  
Old - user found in the system but not found in the uploaded CSV.  
Update - user found in the system and found in the uploaded CSV.  
New - user not found in the system and found in the uploaded CSV.  
Error - user with invalid field set for update and insert actions.

NB - When creating new users, please ensure that the following mandatory fields are present and correct: username, firstname or surname, password and email.

Add	Update	Sync Groups	Sync Roles	Subscribe to all news channels	Status	Username	Firstname	Surname	Manager ID
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	jennifer	Jennifer	Langdon	29
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	pipa	Pippa	Fraser	37
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	vanessa	Vanessa	Wright	23
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	stephanie	Stephanie	Hunter	11
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	victor	Victor	McLean	11
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	jason	Jason	Reid	215
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Update	jacob	Jacob	Black	14

Once the import finishes, all users included in the CSV will have their manager updated to reflect the corresponding person via the user ID that was

entered in the Manager ID column.

Direct reports in turn will also be filled out based on this.

This can be checked by looking at user profiles from the admin side and seeing who is entered in the 'Org Chart' tab.

---

Created on 26 October 2018 by Hannah Door. Last modified on 1 December 2023

Tags: ldap, manager, org chart, subordinate