

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)

Ad	min / Pe	eople Control Panel						
1	Users	2 Power users	L Roles AGro	ups 🛛 🤁 Password policy				
	Name:			، ۵				
All	A B	CDEFGH	I J K L M N	OPQRSTU VWX	Y Z	11 First	name, Surr	name
	Photo	Full name 🔺	Role	Group	Dummy User Account	Assigned	Spare	
+	9	Abigail Clark	none	Human Resources, Company, Learning and Development	Yes		Yes	
Ŧ		Alan Metcalfe	none	Sales, Company	Yes		No	
Ŧ		Alison Kelly	none	Human Resources, Company	Yes		Yes	
1	Ø	Amelia Jackson	none	Human Resources, Company	Yes		Yes	
1		Anne Wilkins	none	Professional Services, Company	Yes		No	
1	9	Austin Glover	none	Marketing, Company	Yes	Robert Reith	No	

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

Admin / People Control Pa	anel / Edit user info		
Ledit user information	L Role L Group L Org char	t 🏟 Other settings	
User code			Change image
Last time login	17-03-2018 16:08		Delete image
Account state	Enabled O Disabled		
Assign user to extranet area	Primary Area 💲		
Username*	abigail		🔲 🚾 Email log-in details
R Password		Generate random password	
	(if you want to change it)		
K Confirm Password			
First name*	Abigail		

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				
Ledit user information	Role 🤽 Group	🛔 Org chart	🔅 Other set	ttings	
Manager	Pippa Fraser		x *	Browse	
Direct Reports	× Alison Kelly × Amelia Jackson View general org chart settings				Browse
	Jpdate				

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		٥
Keywords		All words 🗸	
Role	All ~	Extranet area All	v
Group	All Vith subgroup	s	
Results per page	10 ~		
Fields Edit list	♦ Usemame ♦ ♦ First name	• ♦ ★ Surname	↑ ID
CSV delimiter	O Semicolon () Comma () Filter Print CSV Reset		
Username	First name	Surname	ID
admin	Claromentis	Administrator	1

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				Qi
Keywords			All words ~		
Role	All		Extranet area All	v	
Group	All	✓ □ With subgroups			
Results per page	10 ~				
Fields	Username	🕴 🕈 First name	🕹 🛊 Surname	Manager ID	
CSV delimiter	 Semicolon (;) 				
	Comma () Filter Print CSV Reset				
Jsername	First name	Suma	ime	Manager ID	
dmin	Claromentis	Admir	nistrator		
annitar	loopilor	Lanar	lan.		

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				
pippa	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:



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:

dmin / People Control Panel	/ Mass	add/update	users							0
	Status value can be Error. New Update, Old. Old - user towal in the system bar for found in the uploaded CSV. Update - user north towal in the system and found in the uploaded CSV. New - user out found in the system and found in the uploaded CSV. Error - user with invalid field set for update and insert actions.									
ND - VYTRI Orealizing new doets, posase ensure onas une focilowing maincatory fields are present and correct, username, hirstbiame of surname Add Update Sync Groups Sync Roles Subscribe to all news channels								name, paraw		
						Status	Username	Firstname	Surname	Manager ID
			0	0	0	Update	jennifer	Jennifer	Langdon	29
				0		Update	pippa	Pippa	Fraser	37
				0		Update	vanessa	Vanessa	Wright	23
			0	0		Update	stephanie	Stephanie	Hunter	11
			0	0	0	Update	victor	Victor	McLean	11
				0	0	Update	jason	Jason	Reid	215

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.

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