



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 | | | | | | |
|--|----------------|------|--|--------------------|--------------|-------|
| Users Power users Roles Groups Password policy | | | | | | |
| Name: <input type="text"/> <input type="button" value="Search"/> | | | | | | |
| 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 |
| | Alan Metcalfe | none | Sales, Company | Yes | | No |
| | Alison Kelly | none | Human Resources, Company | Yes | | Yes |
| | Amelia Jackson | none | Human Resources, Company | Yes | | Yes |
| | Anne Wilkins | none | Professional Services, Company | Yes | | No |
| | Austin Glover | none | Marketing, Company | Yes | Robert Reith | No |

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

☐ 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 | Claremonts | 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 | |
| jennifer | Jennifer | Langdon | |
| pipa | Pippa | Fraser | |
| vanessa | Vanessa | Wright | |
| stephanie | Stephanie | Hunter | |
| victor | Victor | McLean | |
| jason | Jason | Reid | |
| jacob | Jacob | Black | |
| claire | Claire | Bond | |
| connor | Connor | Chapman | |
| anne | Anne | Wilkins | |
| dan | Dan | Butler | |
| james | James | Terry | |

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

Admins / People Control Panel

Users

Power users

Roles

Groups

Password policy

First name

Surname

All

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

R

S

T

U

V

W

X

Y

Z

Photo

Full name

Role

Group

Dummy User Account

Assigned

Spare

Abigail Clark

Administrators

Company, Human Resources, Learning and Development, Support

Yes

Yes

☐

Alan Metcalfe

none

Company, Sales

Yes

No

☐

Alice Johnson

none

none

☐

Utilities

Add a new user

Export users

Add/update from CSV file

Configuration

General configuration

Configure user profile fields

Configure Skills

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"/> | | | | | |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | jennifer | Jennifer | Langdon | 29 |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | pipa | Pippa | Fraser | 37 |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | vanessa | Vanessa | Wright | 23 |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | stephanie | Stephanie | Hunter | 11 |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | victor | Victor | McLean | 11 |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | jason | Jason | Reid | 215 |
| | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Update | jacob | Jacobi | 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.