



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.

To create the structure that will pull through to charts, ensure all user profiles have the 'Manager' field filled out first.

If using a sync, the manager information can be mapped in the [LDAP tool](#) or the [User Sync](#) module (depending on which one you are using)

Set managers manually

If not using a sync, this can be done by [People administrators](#) on user profiles individually from Admin > People or en masse using a CSV

1. Making manual updates per user

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

A screenshot of the 'Admin > People Control Panel' interface. The left sidebar contains navigation options: 'Admin', 'Staff list', 'UTILITIES' (Add a new user, Export users, Add/update from CSV file), and 'CONFIGURATION' (General configuration, Configure user profile fields, Configure Skills). The main panel shows 'User licences' with 'Licence limit' as 'Unlimited', 'Active users' as '54', and 'Remaining users' as 'Unlimited'. Below this are tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. A search bar is present. A table lists users with columns: Photo, Full name, Job Title, Role, Group, Extranet area, and Last time login. The table contains four rows of user data.

Photo	Full name	Job Title	Role	Group	Extranet area	Last time login
	Abigail Clark	Human Resources Assistant	none	Company, Human Resources, Learning and Development	Primary Area	29-09-2025 23:40
	Alan Metcalfe	Sales Assistant	none	Company, Onboarding, Sales	Primary Area	17-04-2025 17:17
	Alison Kelly	Human Resources Assistant	none	Company, Human Resources	Primary Area	26-05-2020 15:45
	Amelia Jackson	Human Resources Assistant	none	Company, Human Resources	Primary Area	24-07-2020 15:50

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

Admin > People Control Panel > Edit user info

Admin

Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

Synchronize/Update users from user directory

CONFIGURATION

General configuration

Configure user profile fields

Configure Skills

Edit user information

Role

Group

Org chart

Other settings

User code

Last time login 29-09-2025 23:40

Account state ☒ Enabled ☐ Disabled

Assign user to extranet area Primary Area

Username * abigail

First name * Abigail

Surname * Clark

Change image

Delete image

Email log-in details

Specify the user's manager and their direct reports.

You can select one manager, and you can add as many direct reports as necessary.

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

Admin

Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

Synchronize/Update users from user directory

CONFIGURATION

General configuration

Configure user profile fields

Configure Skills

Edit user information

Role

Group

Org chart

Other settings

Manager Pippa Fraser x Browse

Direct Reports x Alison Kelly x Amelia Jackson Browse

View general org chart settings

Update

Once you're 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 other 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.

Click **CSV** to download the information.

Admin

Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

Synchronize/Update users from user directory

CONFIGURATION

General configuration

Configure user profile fields

Configure Skills

Admin > People Control Panel > Users Export

Keywords

All words

Role

All

Extranet area

All

Group

All

With subgroups

Results per page

10

Fields

ID

Username

First name

Surname

Edit list

CSV delimiter

Semicolon (;)

Comma (,)

Filter

Print

CSV

Reset

ID	Username	First name	Surname
1	admin	Claromentis	Administrator

- 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

Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

Synchronize/Update users from user directory

CONFIGURATION

General configuration

Configure user profile fields

Configure Skills

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:

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:

Admin

Staff list

UTILITIES

Add a new user

Export users

Add/update from CSV file

CONFIGURATION

General configuration

Configure user profile fields

Configure Skills

Admin > People Control Panel

User licences

Licence limit

Unlimited

Active users

54

Remaining users

Unlimited

Users

Power users

Roles

Groups

Password policy

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

First name, Surname

Photo	Full name	Job Title	Role	Group	Extranet area	Last time login	
	Abigail Clark	Human Resources Assistant	none	Company, Human Resources, Learning and Development	Primary Area	29-09-2025 23:40	<input type="checkbox"/>
	Alan Metcalfe	Sales Assistant	none	Company, Onboarding, Sales	Primary Area	17-04-2025 17:17	<input type="checkbox"/>
	Alison Kelly	Human Resources Assistant	none	Company, Human Resources	Primary Area	26-05-2020 15:45	<input type="checkbox"/>
	Amelia Jackson	Human Resources Assistant	none	Company, Human Resources	Primary Area	24-07-2020 15:50	<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:



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					
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Status	Username	Firstname	Surname	Manager ID
	<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	Jacob	Black	14

- Once the import is complete, 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.