

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

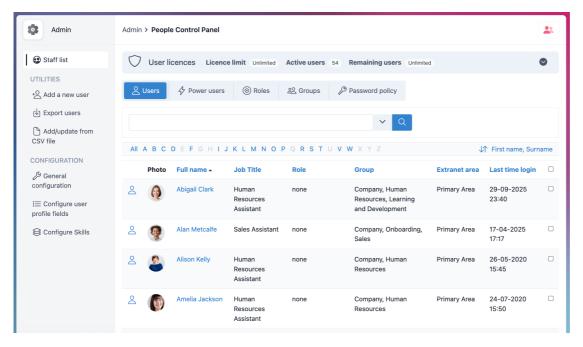
In order to make sure the information the org chart is receiving is correct, we will need to make sure this information is set up in the People application first.

Please note: If you are using LDAP, then the following steps do not apply as this can be automatically configured at the point of LDAP synchronisation

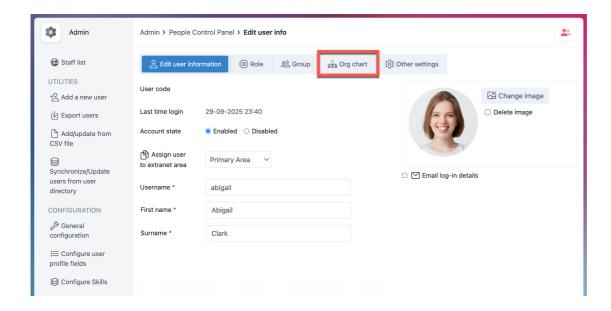
If you are not using LDAP, you can update the user's manager by:

## 1. Making manual updates per user

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



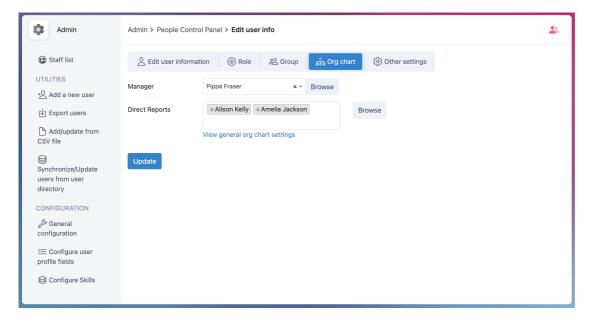
Select a user and navigate to the Org Chart tab.



You can 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.



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.

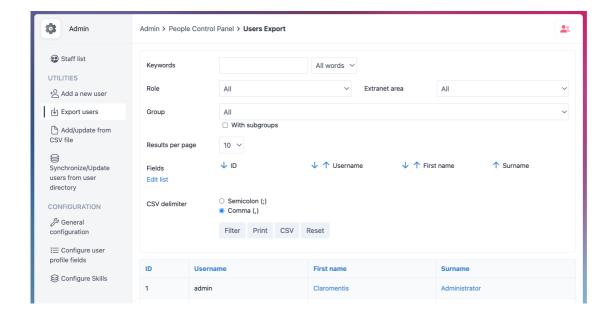
## 2. Making changes en masse via CSV

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.

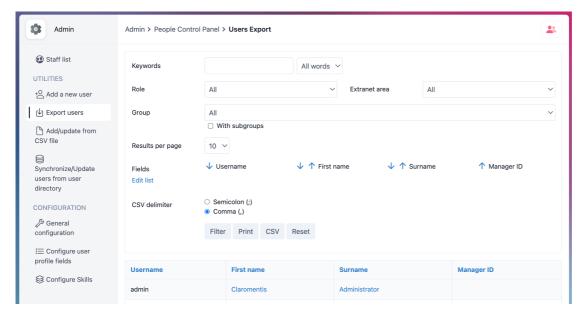
This requires first making an export of all users and their IDs.

Click CSV to download the information.



Next, create a second export of username, first name, last name and manager ID.

Yhis will be the file that is imported to update user profiles.



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.

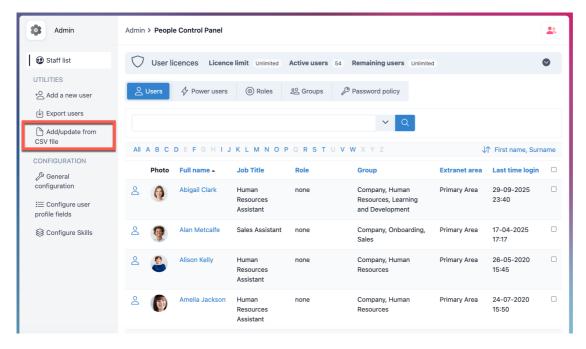
Repeat for all users in the CSV.

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

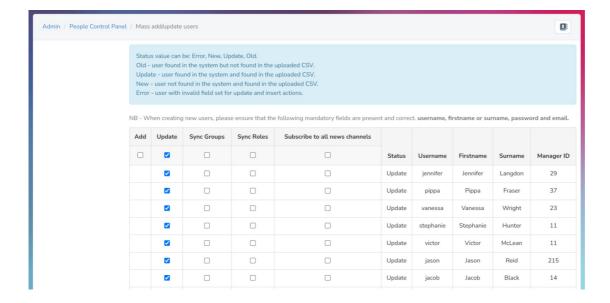
username	firstname	surname	manager_id
admin	Claromentis	Administrator	16
jennifer	Jennifer	Langdon	29
pippa	Pippa	Fraser	37
vanessa	Vanessa	Wright	23
stephanie	Stephanie	Hunter	11
victor	Victor	McLean	11
jason	Jason	Reid	215
jacob	Jacob	Black	14
claire	Claire	Bond	11
connor	Connor	Chapman	11
anne	Anne	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  ${\bf Admin > People}$  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:



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.

Last modified on 6 October 2025 by Veronica Kim

Created on 26 October 2018 by Hannah Door Tags: Idap, manager, org chart, subordinate