



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.

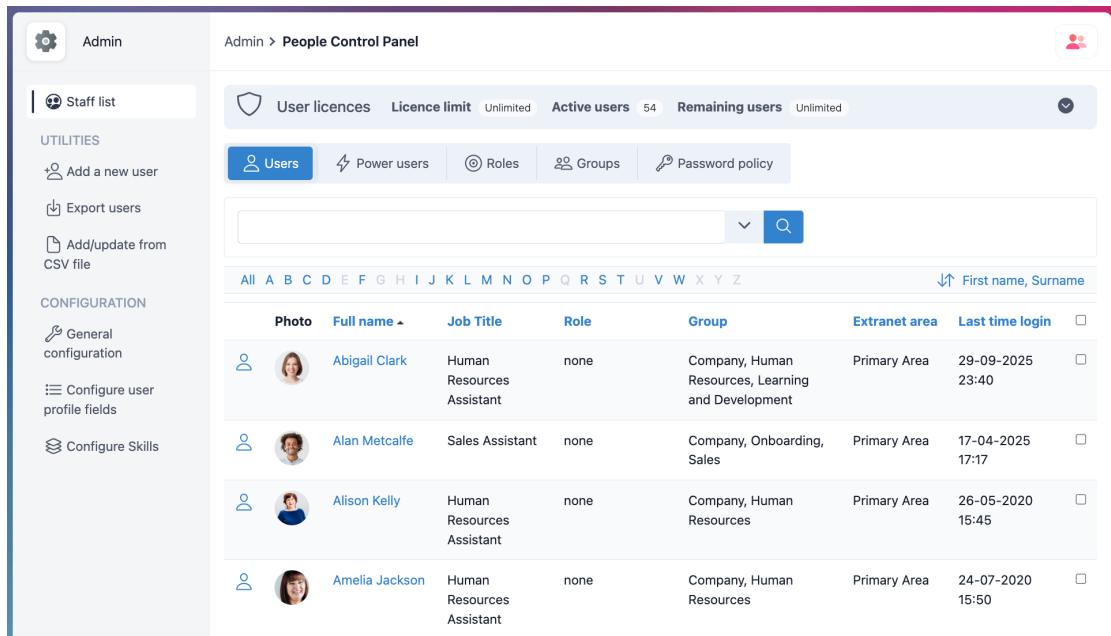
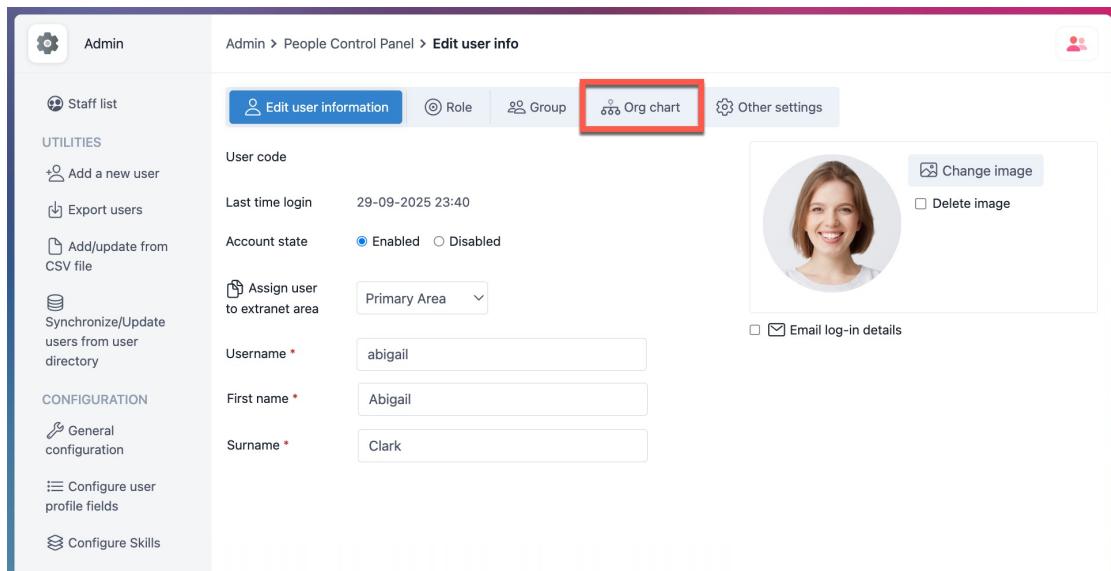


Photo	Full name	Job Title	Role	Group	Extranet area	Last time login
	Abigail Clark	Human Resources Assistant	none	Company, Human Resources, Learning and Development	Primary Area	29-09-2025 23:40
	Alan Metcalfe	Sales Assistant	none	Company, Onboarding, Sales	Primary Area	17-04-2025 17:17
	Alison Kelly	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**

Org chart

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

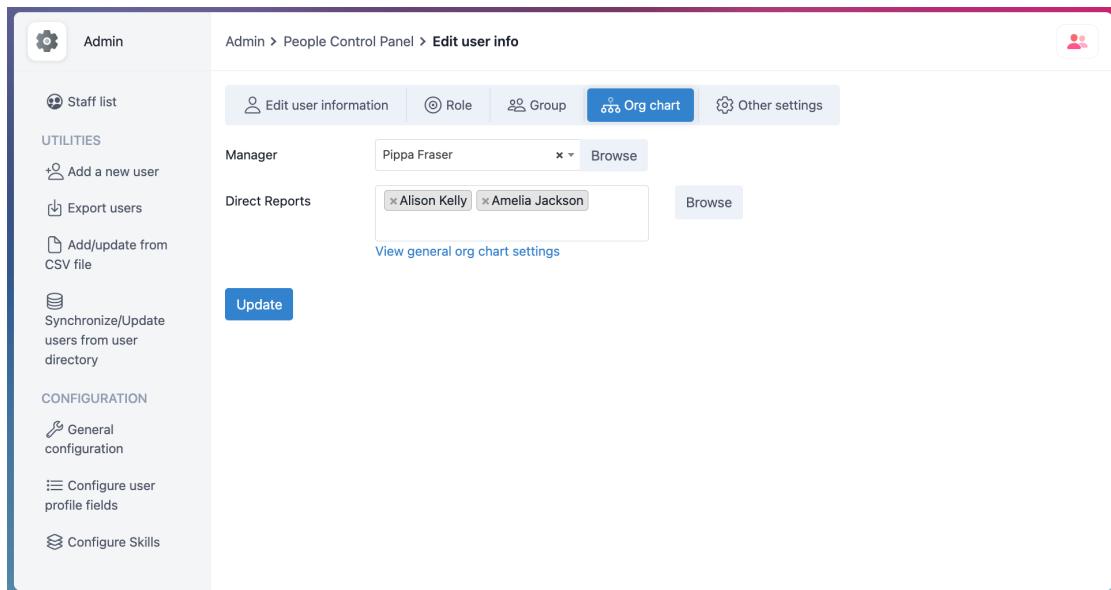
Delete image

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**

Org chart

Manager: Pippa Fraser

Direct Reports: Alison Kelly, Amelia Jackson

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.

- 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.

- 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.

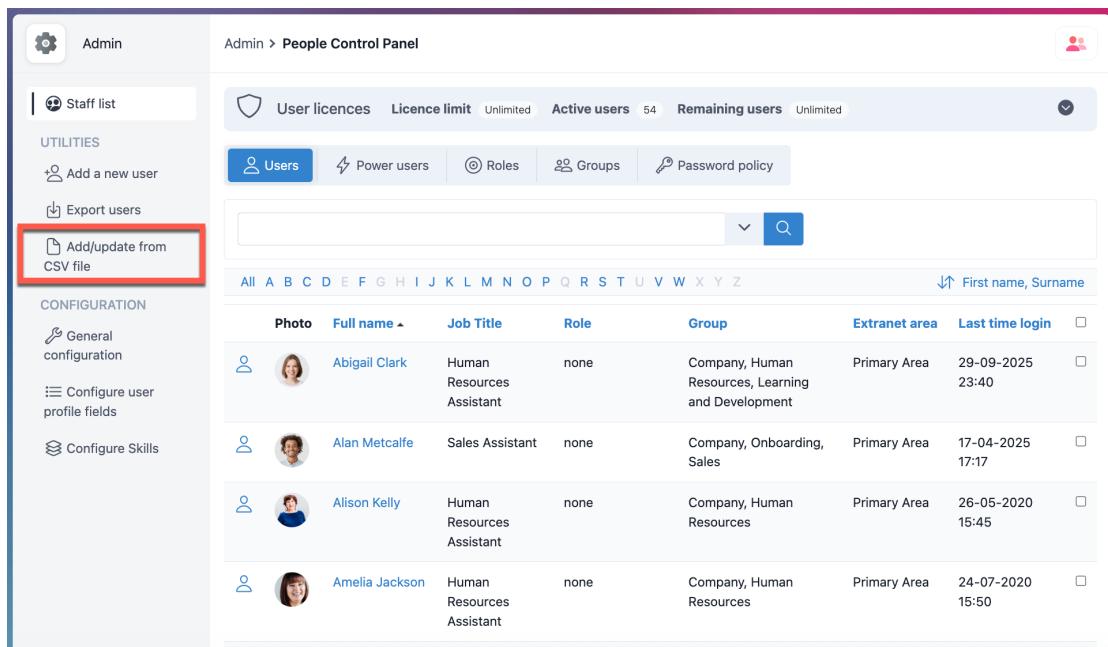
- Repeat for all users in the CSV.

- 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 **Admin > People** to import it:



The screenshot shows the 'Admin > People Control Panel' interface. On the left, there's a sidebar with 'Staff list', 'UTILITIES' (containing 'Add a new user' and 'Export users'), and 'CONFIGURATION' (containing 'General configuration', 'Configure user profile fields', and 'Configure Skills'). The main area is titled 'User licences' with 'Licence limit' set to 'Unlimited' and 'Active users' at '54'. Below this is a navigation bar with 'Users' (selected), 'Power users', 'Roles', 'Groups', and 'Password policy'. The main content area is a table of user data. The table has columns: Photo, Full name (sorted by 'Full name'), Job Title, Role, Group, Extranet area, Last time login, and a checkbox column. The data shows four users: Abigail Clark, Alan Metcalfe, Alison Kelly, and Amelia Jackson, all with 'Human Resources Assistant' as their role and 'Company, Human Resources' as their group. The 'Last time login' column shows dates from 2020 to 2025. A red box highlights the 'Add/update from CSV file' button in the sidebar.

- 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	pippa	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.

Created on 24 December 2025 by [Hannah Door](#)

Tags: [ldap](#), [manager](#), [org chart](#), [subordinate](#)