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 profilesshave 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.
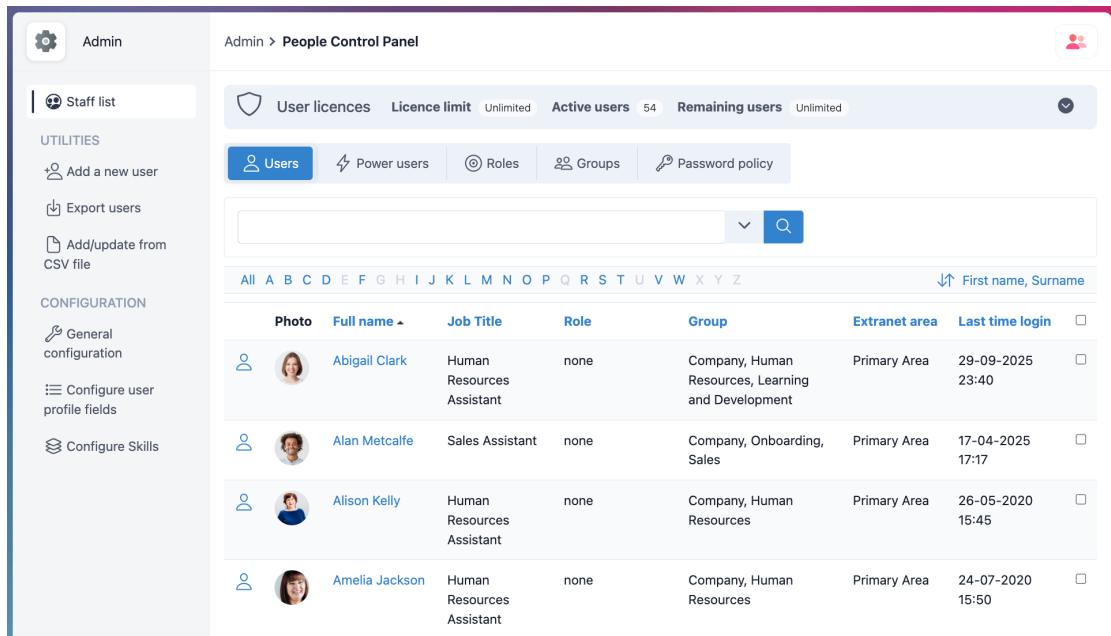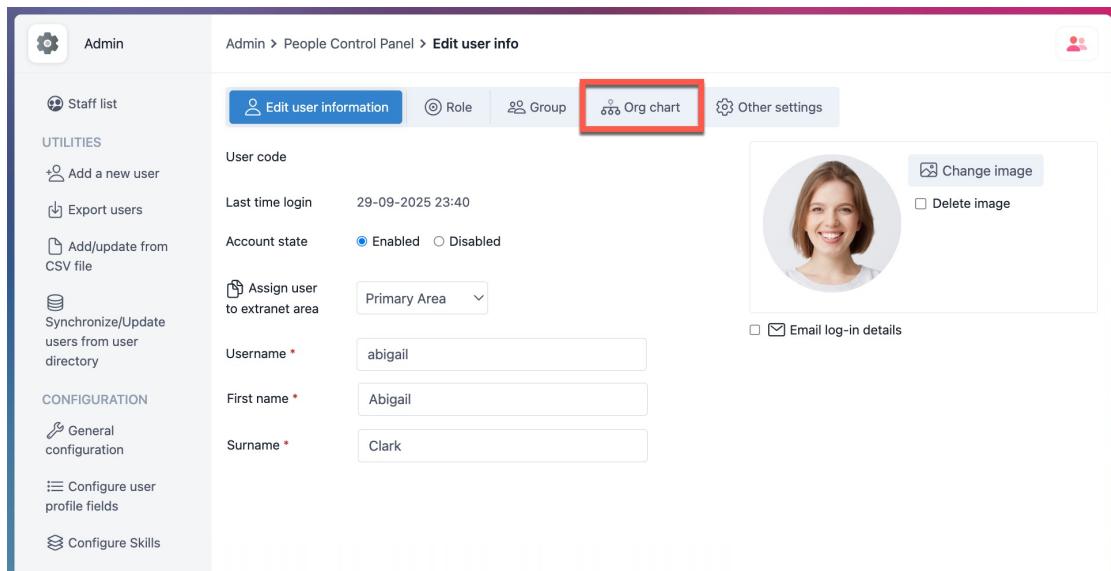

Select a user and navigate to the **Org Chart** tab.
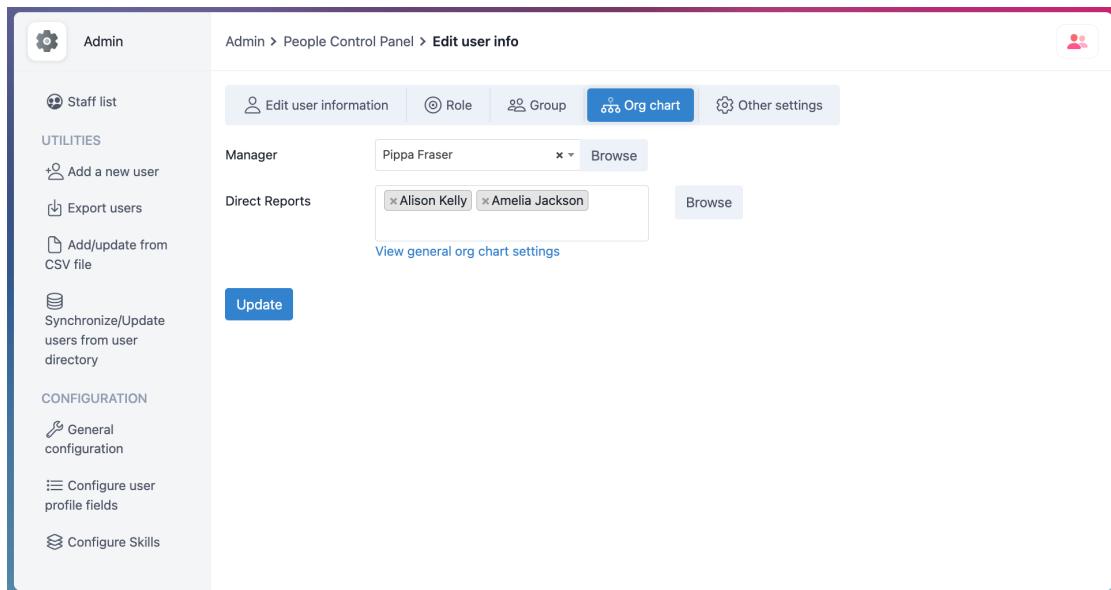
Specify the user's manager and their direct reports.

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.

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.
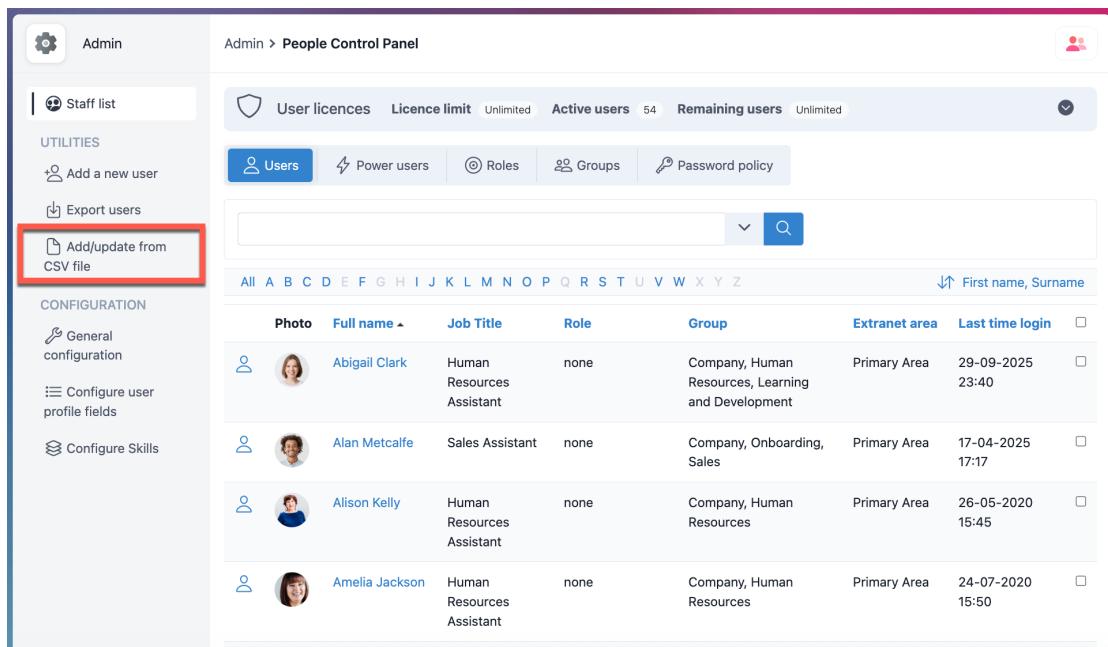
- Repeat for all users in the CSV.

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

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:

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
☐	☑	☐	☐	☐					
	☑	☐	☐	☐	Update	jennifer	Jennifer	Langdon	29
	☑	☐	☐	☐	Update	pippa	Pippa	Fraser	37
	☑	☐	☐	☐	Update	vanessa	Vanessa	Wright	23
	☑	☐	☐	☐	Update	stephanie	Stephanie	Hunter	11
	☑	☐	☐	☐	Update	victor	Victor	McLean	11
	☑	☐	☐	☐	Update	jason	Jason	Reid	215
	☑	☐	☐	☐	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