



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

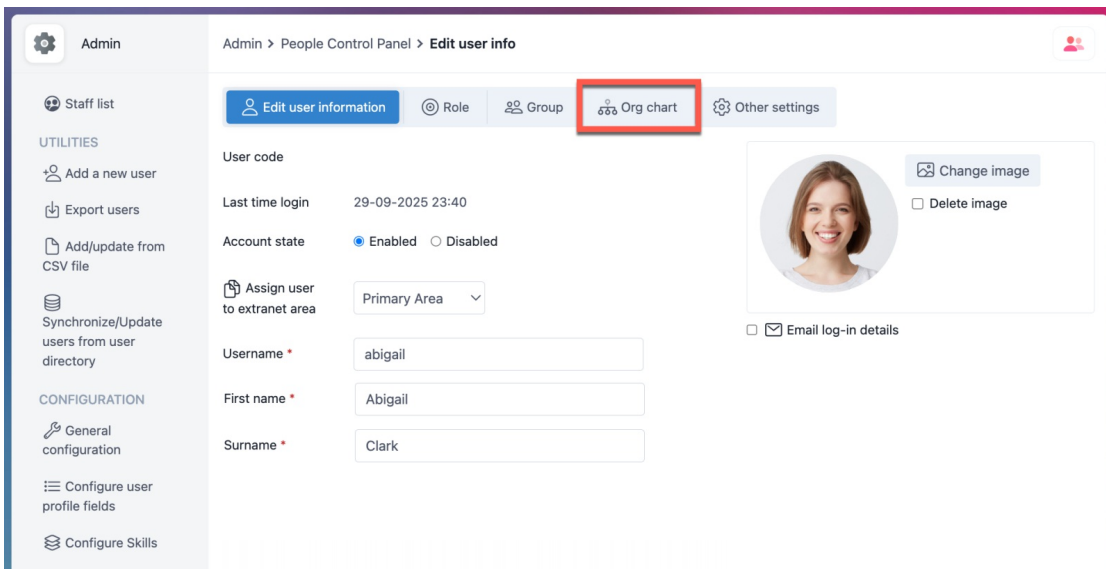
1. Making manual updates per user

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 like '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 area shows 'User licences' (Licence limit: Unlimited, Active users: 54, Remaining users: Unlimited) and tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. Below is a search bar and a table of users with columns for Photo, Full name, Job Title, Role, Group, Extranet area, and Last time login. The table lists four users: Abigail Clark, Alan Metcalfe, Alison Kelly, and Amelia Jackson.

| 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"/> |

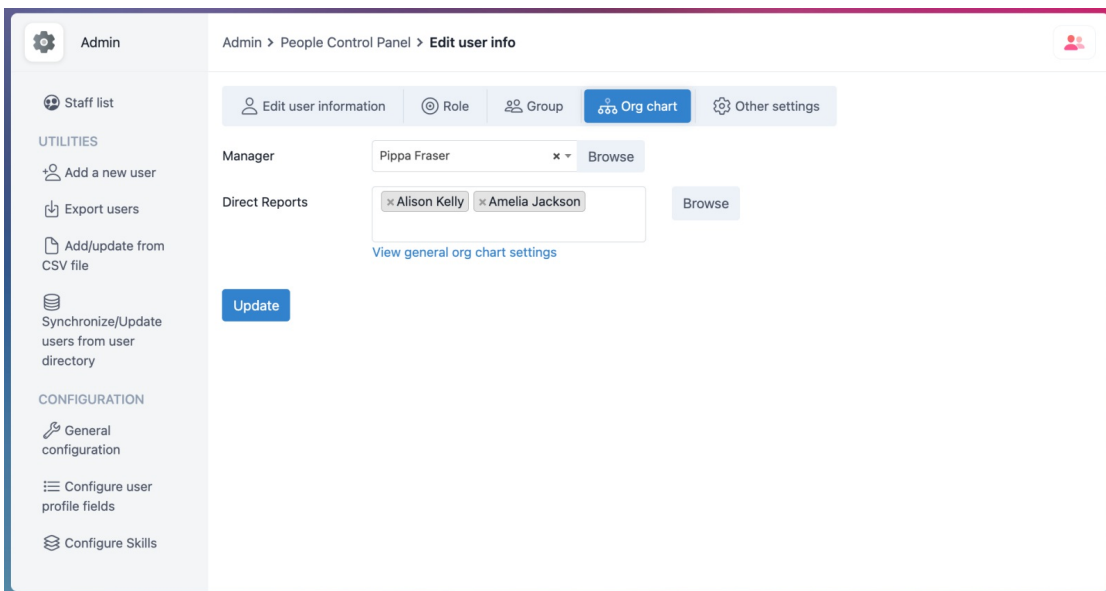
Select a user and navigate to the **Org Chart** tab.



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.

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 > 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:

The screenshot shows the 'Admin > People Control Panel' interface. On the left-hand navigation menu, the 'Add/update from CSV file' option is highlighted with a red box. The main panel displays user statistics: 'User licences' (Unlimited), 'Licence limit' (Unlimited), 'Active users' (54), and 'Remaining users' (Unlimited). Below this, there are tabs for 'Users', 'Power users', 'Roles', 'Groups', and 'Password policy'. A search bar is present, and a list of users is shown with columns for Photo, Full name, Job Title, Role, Group, Extranet area, and Last time login. The 'Add/update from CSV file' option is highlighted in the left-hand menu.

- 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](#)