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Performance DNA Administrator Guide

Hierarchy Import Functionality

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Hierarchy Import Functionality

Organizations can upload files containing their organizational hierarchy to be processed as part of the **OrgData Import** using the **Import Users** page.

IMPORT USERS

Please upload your orgdata files here for processing in the next scheduled run. The filename chosen must match the name in the Name column.

Name	Upload	Result
OrgDataUsers.csv	CHOOSE FILE	Not Uploaded

Submit

The screen will provide an upload control for each file specified in the import configuration file. These should all be .CSV files.

The following shows an example hierarchy. In this example, Tony Price is the manager at the top level. The format of the file must match that specified in the OrgData configuration for it to be processed correctly.

Firstname	Lastname	Employee Number	Manager	Position	Region	Location	Team	Company	Date	Product Knowledge	Agent	Customer	Info ID	Product Sales
John	Price	1000000001		Agent	London	London	Team 1	My Company	10/10/2010	100	1	1	1	1
Camille	Price	1000000002	1000000001	Agent	London	London	Team 2	My Company	10/10/2010	20	2	2	2	2
Lee	Price	1000000003	1000000001	Agent	London	London	Team 3	My Company	10/10/2010	30	3	3	3	3
Walter	Price	1000000004	1000000001	Agent	London	London	Team 4	My Company	10/10/2010	40	4	4	4	4
Robert	Price	1000000005	1000000001	Agent	London	London	Team 5	My Company	10/10/2010	50	5	5	5	5
Delia	Price	1000000006	1000000001	Agent	London	London	Team 6	My Company	10/10/2010	60	6	6	6	6
William	Price	1000000007	1000000001	Agent	London	London	Team 7	My Company	10/10/2010	70	7	7	7	7
Anthony	Price	1000000008	1000000001	Agent	London	London	Team 8	My Company	10/10/2010	80	8	8	8	8
John	Price	1000000009	1000000001	Agent	London	London	Team 9	My Company	10/10/2010	90	9	9	9	9
Crystal	Price	1000000010	1000000001	Agent	London	London	Team 10	My Company	10/10/2010	100	10	10	10	10
Lee	Price	1000000011	1000000001	Agent	London	London	Team 11	My Company	10/10/2010	110	11	11	11	11
David	Price	1000000012	1000000001	Agent	London	London	Team 12	My Company	10/10/2010	120	12	12	12	12
John	Price	1000000013	1000000001	Agent	London	London	Team 13	My Company	10/10/2010	130	13	13	13	13
John	Price	1000000014	1000000001	Agent	London	London	Team 14	My Company	10/10/2010	140	14	14	14	14
John	Price	1000000015	1000000001	Agent	London	London	Team 15	My Company	10/10/2010	150	15	15	15	15
John	Price	1000000016	1000000001	Agent	London	London	Team 16	My Company	10/10/2010	160	16	16	16	16
John	Price	1000000017	1000000001	Agent	London	London	Team 17	My Company	10/10/2010	170	17	17	17	17
John	Price	1000000018	1000000001	Agent	London	London	Team 18	My Company	10/10/2010	180	18	18	18	18
John	Price	1000000019	1000000001	Agent	London	London	Team 19	My Company	10/10/2010	190	19	19	19	19
John	Price	1000000020	1000000001	Agent	London	London	Team 20	My Company	10/10/2010	200	20	20	20	20
John	Price	1000000021	1000000001	Agent	London	London	Team 21	My Company	10/10/2010	210	21	21	21	21
John	Price	1000000022	1000000001	Agent	London	London	Team 22	My Company	10/10/2010	220	22	22	22	22
John	Price	1000000023	1000000001	Agent	London	London	Team 23	My Company	10/10/2010	230	23	23	23	23
John	Price	1000000024	1000000001	Agent	London	London	Team 24	My Company	10/10/2010	240	24	24	24	24
John	Price	1000000025	1000000001	Agent	London	London	Team 25	My Company	10/10/2010	250	25	25	25	25
John	Price	1000000026	1000000001	Agent	London	London	Team 26	My Company	10/10/2010	260	26	26	26	26
John	Price	1000000027	1000000001	Agent	London	London	Team 27	My Company	10/10/2010	270	27	27	27	27
John	Price	1000000028	1000000001	Agent	London	London	Team 28	My Company	10/10/2010	280	28	28	28	28
John	Price	1000000029	1000000001	Agent	London	London	Team 29	My Company	10/10/2010	290	29	29	29	29
John	Price	1000000030	1000000001	Agent	London	London	Team 30	My Company	10/10/2010	300	30	30	30	30

Choose each of the files that need to be updated and then click **Submit**.

Once the files have been uploaded they will be processed as part of the next configured **OrgData** run and the user hierarchy will be updated.

Notes:

- If you are managing Training Manager users through Performance DNA, ensure that you have first created and mapped the Portal Employee ID Field mapping in Performance DNA -> System Settings -> General Settings tab.
- Portal users may only have one Portal role at a time. Users who have been assigned to the Portal Trainer role cannot become Portal Managers and vice versa.
- Users who have the Portal administrator role and any other Portal role will be treated as Portal administrators only.
- OrgData** deletes the file specified after it has been imported.

For more information please refer to the **OrgData** documentation.