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Performance DNA Administrator Guide

Hierarchy Import Functionality

5/12/2025

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	Surname	Employee Number	Manager	Position	Region	Location	Team	Company	Date	Product Knowledge	Agent	Customer	Info ID	Product Sales
Walt	Disney	1000000001	1000000001	Agent	London	London	Team 1	My Company	10/10/2019	100	1	1	1	1
Camelot	Kingdom	1000000002	1000000001	Agent	London	London	Team 2	My Company	10/10/2019	2	2	2	2	2
Leanne	James	1000000003	1000000001	Agent	London	London	Team 3	My Company	10/10/2019	3	3	3	3	3
Walter	Scott	1000000004	1000000001	Agent	London	London	Team 4	My Company	10/10/2019	4	4	4	4	4
Robert	Scott	1000000005	1000000001	Agent	London	London	Team 5	My Company	10/10/2019	5	5	5	5	5
Robert	Scott	1000000006	1000000001	Agent	London	London	Team 6	My Company	10/10/2019	6	6	6	6	6
Robert	Scott	1000000007	1000000001	Agent	London	London	Team 7	My Company	10/10/2019	7	7	7	7	7
Robert	Scott	1000000008	1000000001	Agent	London	London	Team 8	My Company	10/10/2019	8	8	8	8	8
Robert	Scott	1000000009	1000000001	Agent	London	London	Team 9	My Company	10/10/2019	9	9	9	9	9
Robert	Scott	1000000010	1000000001	Agent	London	London	Team 10	My Company	10/10/2019	10	10	10	10	10
Robert	Scott	1000000011	1000000001	Agent	London	London	Team 11	My Company	10/10/2019	11	11	11	11	11
Robert	Scott	1000000012	1000000001	Agent	London	London	Team 12	My Company	10/10/2019	12	12	12	12	12
Robert	Scott	1000000013	1000000001	Agent	London	London	Team 13	My Company	10/10/2019	13	13	13	13	13
Robert	Scott	1000000014	1000000001	Agent	London	London	Team 14	My Company	10/10/2019	14	14	14	14	14
Robert	Scott	1000000015	1000000001	Agent	London	London	Team 15	My Company	10/10/2019	15	15	15	15	15
Robert	Scott	1000000016	1000000001	Agent	London	London	Team 16	My Company	10/10/2019	16	16	16	16	16
Robert	Scott	1000000017	1000000001	Agent	London	London	Team 17	My Company	10/10/2019	17	17	17	17	17
Robert	Scott	1000000018	1000000001	Agent	London	London	Team 18	My Company	10/10/2019	18	18	18	18	18
Robert	Scott	1000000019	1000000001	Agent	London	London	Team 19	My Company	10/10/2019	19	19	19	19	19
Robert	Scott	1000000020	1000000001	Agent	London	London	Team 20	My Company	10/10/2019	20	20	20	20	20
Robert	Scott	1000000021	1000000001	Agent	London	London	Team 21	My Company	10/10/2019	21	21	21	21	21
Robert	Scott	1000000022	1000000001	Agent	London	London	Team 22	My Company	10/10/2019	22	22	22	22	22
Robert	Scott	1000000023	1000000001	Agent	London	London	Team 23	My Company	10/10/2019	23	23	23	23	23
Robert	Scott	1000000024	1000000001	Agent	London	London	Team 24	My Company	10/10/2019	24	24	24	24	24
Robert	Scott	1000000025	1000000001	Agent	London	London	Team 25	My Company	10/10/2019	25	25	25	25	25
Robert	Scott	1000000026	1000000001	Agent	London	London	Team 26	My Company	10/10/2019	26	26	26	26	26
Robert	Scott	1000000027	1000000001	Agent	London	London	Team 27	My Company	10/10/2019	27	27	27	27	27
Robert	Scott	1000000028	1000000001	Agent	London	London	Team 28	My Company	10/10/2019	28	28	28	28	28
Robert	Scott	1000000029	1000000001	Agent	London	London	Team 29	My Company	10/10/2019	29	29	29	29	29
Robert	Scott	1000000030	1000000001	Agent	London	London	Team 30	My Company	10/10/2019	30	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.