TEAMS - Creating a Team (CSV import)

Before you begin, please note:

- This process is for importing solid-line, reports-to hierarchy only
- Can be completed using the [reports-to template](#)
- Requires that your employee data has already been imported

1. Populate your CSV

Open the reports-to template and you'll see four columns (Username, Supervisor Username, Role Name, Team Name).

For a valid import, your CSV is required to have the first two columns populated as follows:

- **Username** – entered for each employee (usually their work email address)*
- **Supervisor Username** - each employee's supervisor's username (also usually their work email address).

*Verify Usernames via *Administration settings > Contributor Configuration > Edit/delete Contributors*. Assigning a Contributor's work email as their Username is the recommended setting and is the method shown in the template example).

Username	Supervisor username
CEO@yourdomain.com	
emp1@yourdomain.com	CEO@yourdomain.com
emp2@yourdomain.com	CEO@yourdomain.com
emp3@yourdomain.com	emp1@yourdomain.com
emp4@yourdomain.com	emp1@yourdomain.com

NOTE - It is important to ensure the chain of command is continuous from top to bottom, **make sure to leave a blank for the Supervisor Username of your top manager (CEO, City Administrator, etc.)**

The remaining columns can also be used for importing (but are not required).

- **Role Name** – often mapped to an employee's job title, if left blank it can be filled in manually later.
- **Team Name** – if not entered, a default name will be created, which can be manually updated later.

2. Import your CSV

Once the CSV is ready to be imported:

1. Click the Gear icon (at the bottom of the Main Navigation) and go to *Administration settings > TEAMS View > Import structure*
2. Make the appropriate Category and Chart Selections
3. Click "Choose File" to locate your CSV and then click "Upload"

NOTE – if you have edited the column headings in any way, you will be prompted to re-map them to the original headings.

If your CSV upload is successful, your process from CSV to TEAMS view should resemble something like this:

Username	Supervisor username
CEO@yourdomain.com	
emp1@yourdomain.com	CEO@yourdomain.com
emp2@yourdomain.com	CEO@yourdomain.com
emp3@yourdomain.com	emp1@yourdomain.com
emp4@yourdomain.com	emp1@yourdomain.com