Group Leader Navigation Guide

LearnDash Groups Plus

Prepared by Tangible Inc.

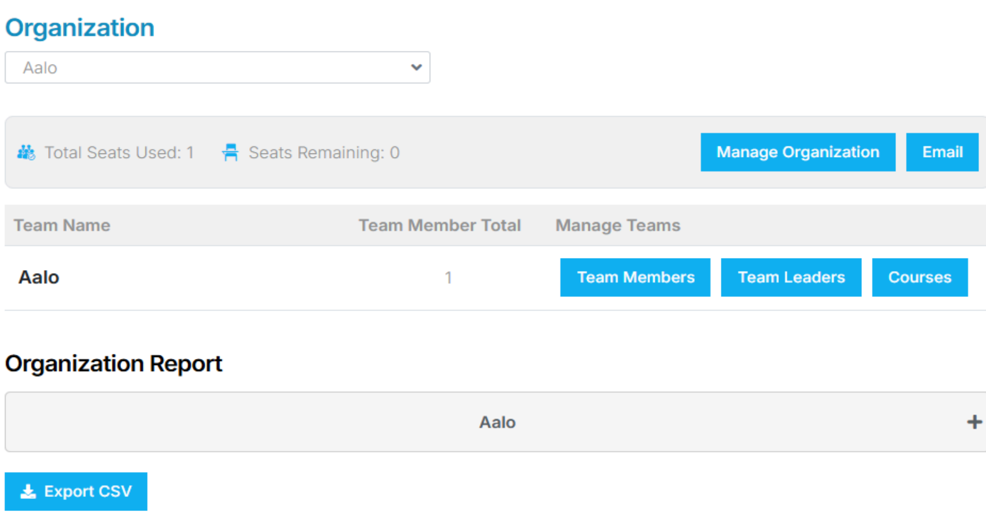
1. Logging In

1. Go to the training platform and log in with the credentials provided by your organization.
2. Click the **Organization Dashboard** link in the site menu.

> **Tip:** Bookmark this page for quick access. If you don't see a link in the menu, use the URL provided by your administrator.

2. Dashboard Overview

Your dashboard is the central hub for managing your organization's training. Here's what you'll see:



Main Dashboard — Organization header, seats, teams table, and report

Area	What It Does
Organization Name	Displays the name of the organization you're currently viewing (top left).
Change Organization	Dropdown (top right) to switch between organizations. You only see organizations assigned to you.
Total Seats Used	Number of seats currently occupied by enrolled team members.
Seats Remaining	Number of open seats available for new enrollments.
Manage Organization	Opens a popup to view, delete, or add teams. See Section 4.

Email	Opens a popup to message members of your organization. See Section 5.
Teams Table	Lists every team with its name, member count, and action buttons.
Team Members	Link to the full Team Members view for that team. See Section 6.
Team Leaders	Opens a popup to view, add, or remove leaders. See Section 8.
Courses	Opens a popup to manage courses assigned to that team. See Section 9.
Organization Report	Summary report table at the bottom of the dashboard.
Export CSV	Downloads a CSV of the organization report data.

3. Switching Organizations

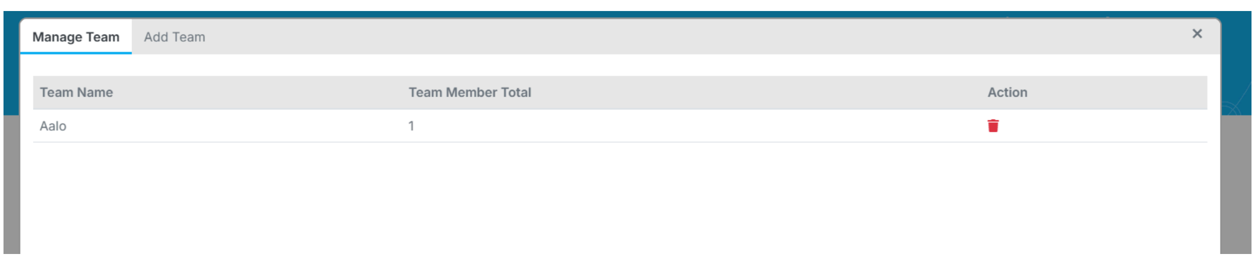
1. Look for the **Change Organization** dropdown in the top-right corner.
2. Select the organization you want to manage.
3. The page will refresh and show the teams, seats, and data for that organization.

4. Manage Organization

Clicking **Manage Organization** opens a popup with two tabs:

4a. Manage Team Tab

Lists all your teams with Team Name, Team Member Total, and a Delete action.



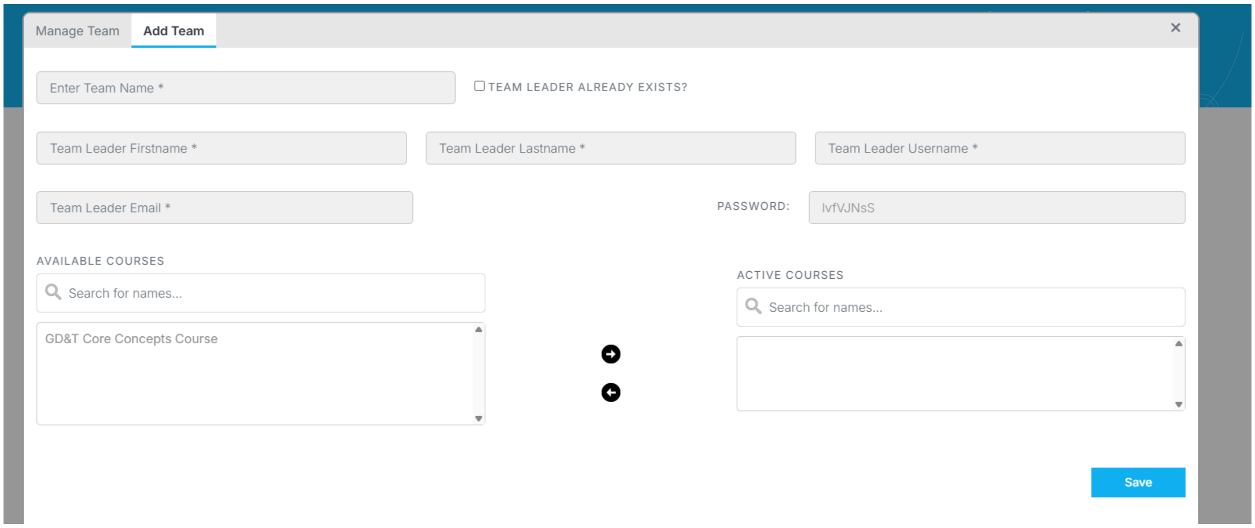
Manage Organization — Manage Team tab

4b. Add Team Tab

Create a new team by filling in:

1. **Team Name**
2. **Team Leader**: Select an existing leader, or uncheck “Team Leader already exists?” to create a new one (first name, last name, username, email, password).
3. **Courses**: Move courses from Available to Assigned using the arrow buttons.

4. Click **Save**.



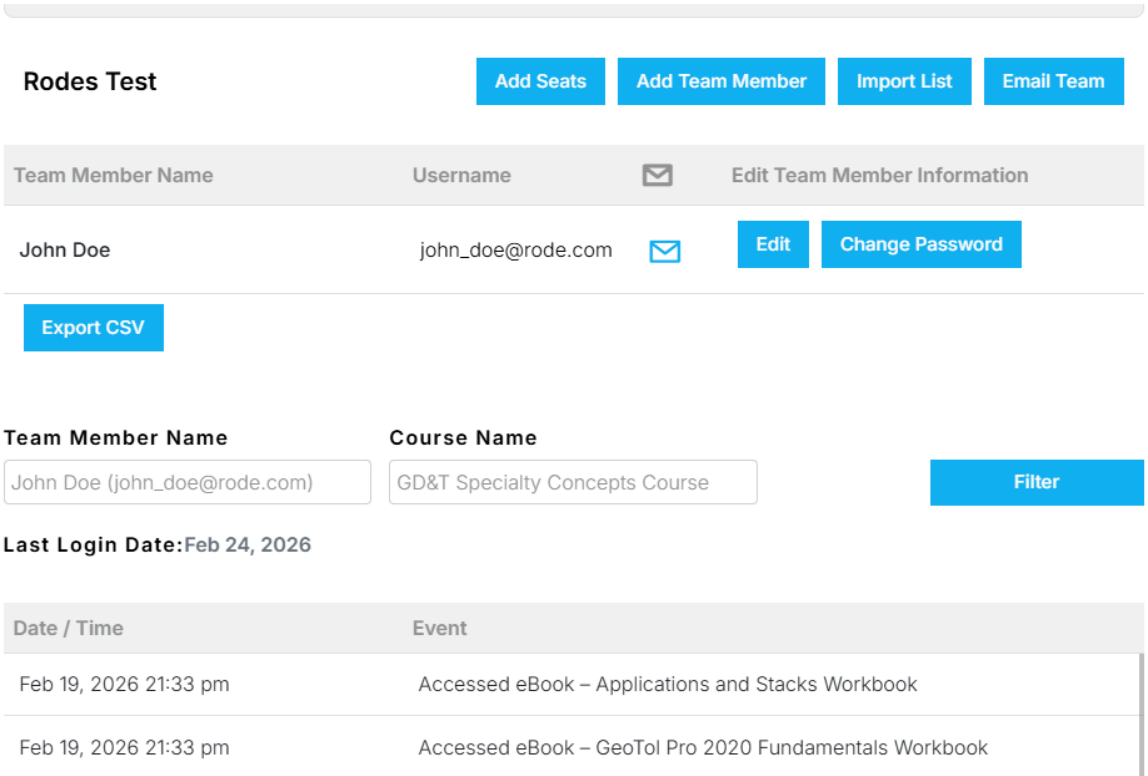
Manage Organization — Add Team tab

5. Emailing Your Organization

1. Click the **Email** button in the header bar.
2. A popup will open where you can compose and send a message to members of your organization.

6. Team Members View

Clicking **Team Members** takes you to a dedicated page for that team. A **Back to Organization** button appears in the header to return to the main dashboard.



Team Members view — header buttons and member list

6a. Header Buttons

Button	What It Does
Add Seats	Purchase additional seats.
Add Team Member	Opens a popup to create a new member (first name, last name, username, email, password).
Import List	Opens a popup to bulk-import members via CSV upload.
Email Team	Opens a popup to email members of this specific team.

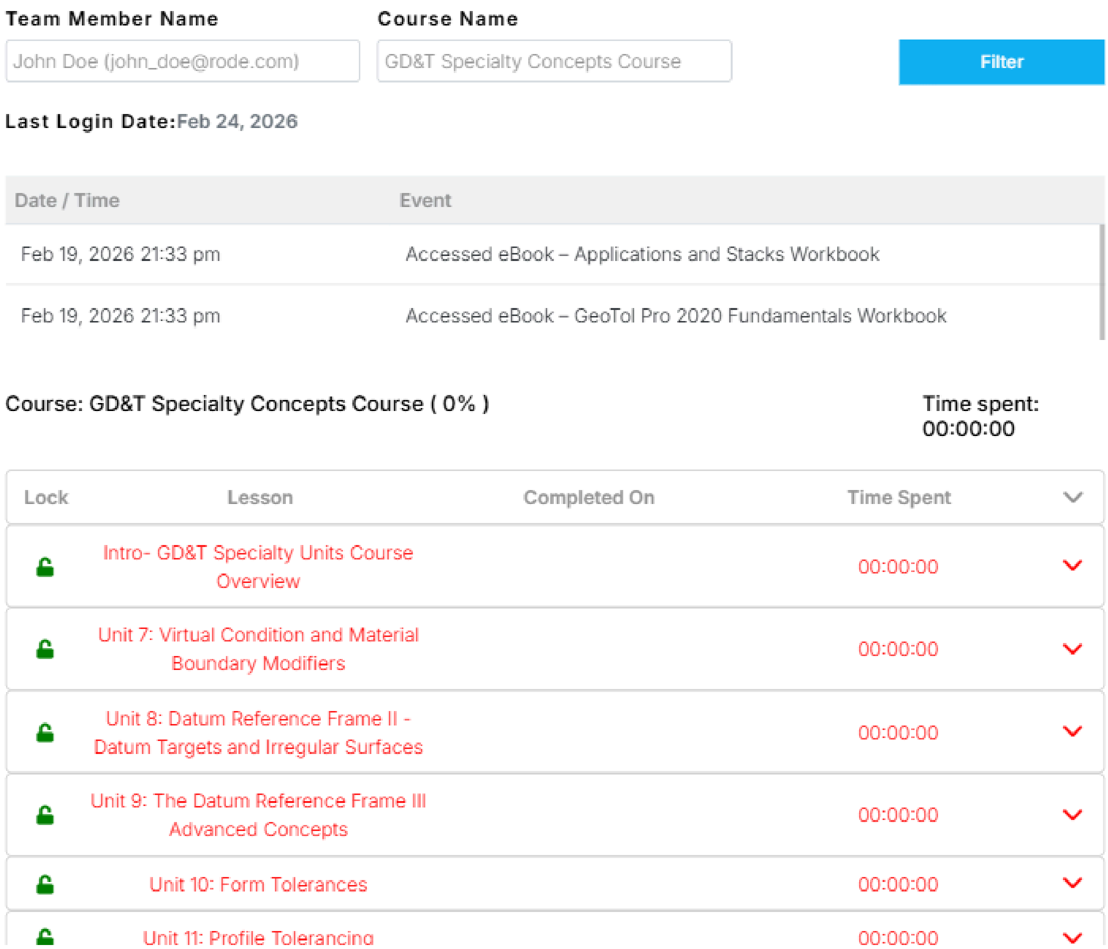
6b. Member List Table

Column	Details
Team Member Name	First and last name.
Username	Login username.
Email Icon (✉)	Click to email that member directly.
Edit / Change Password	Edit button to update member info. Change Password button to reset their password.

At the bottom of the table: **Export CSV** downloads the team member list.

7. Tracking Course Progress

Below the member table, you'll see the progress tracking section.



Filter, Login History, and Lesson/Quiz Progress

7a. Filtering

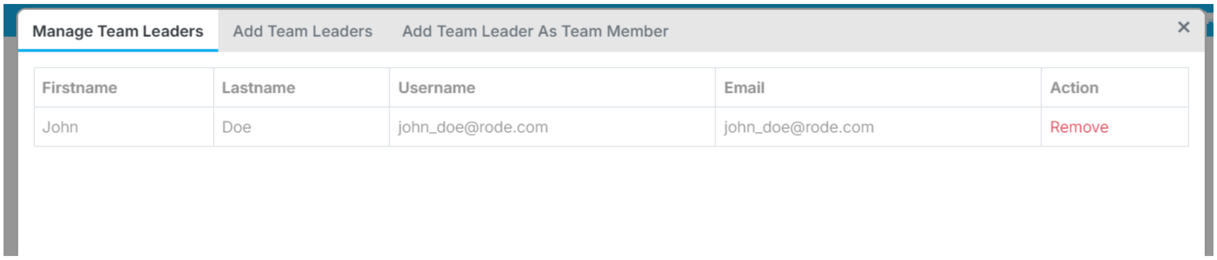
Use the dropdowns to select a **Team Member** and a **Course**, then click **Filter**. The **Last Login Date** for the selected member is shown below the filter.

7b. Login History

A table showing the member's login events and course access events with Date/Time and Event columns.

8. Managing Team Leaders

Clicking **Team Leaders** opens a popup with three tabs:



Team Leaders popup — Manage Team Leaders tab

8a. Manage Team Leaders

Table showing current leaders: First name, Last name, Username, Email, and a Remove action.

8b. Add Team Leader

Add a leader by selecting an existing user, or create a new one with first name, last name, username, email, and password.

8c. Add Team Leader as Team Member

Select a leader from the dropdown to also enroll them as a team member, so they can access the team's courses.

Use the arrow buttons to move courses between the **Available** and **Assigned** columns. Use the search box to filter by course name. Click **Save** when done.

> **Note:** The Courses button is only visible to Organization administrators and primary Group Leaders.

10. Organization Report & Export

At the bottom of the main dashboard, the **Organization Report** section shows a summary table. Click **Export CSV** to download the report data.

> **Note:** If the report table shows "Table is loading..." and no data appears, no team members have active course enrollments yet.