

# **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:

The screenshot shows the Organization Dashboard interface. At the top, there is a section titled "Organization" with a dropdown menu currently set to "Aalo". Below this, a summary bar displays "Total Seats Used: 1" and "Seats Remaining: 0", along with "Manage Organization" and "Email" buttons. A table lists the organization's teams, with columns for "Team Name", "Team Member Total", and "Manage Teams". The table shows one team named "Aalo" with 1 member, and buttons for "Team Members", "Team Leaders", and "Courses". Below the table is an "Organization Report" section with a dropdown menu set to "Aalo" and a "+" button, and an "Export CSV" button.

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

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

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

### 3. Switching Organizations

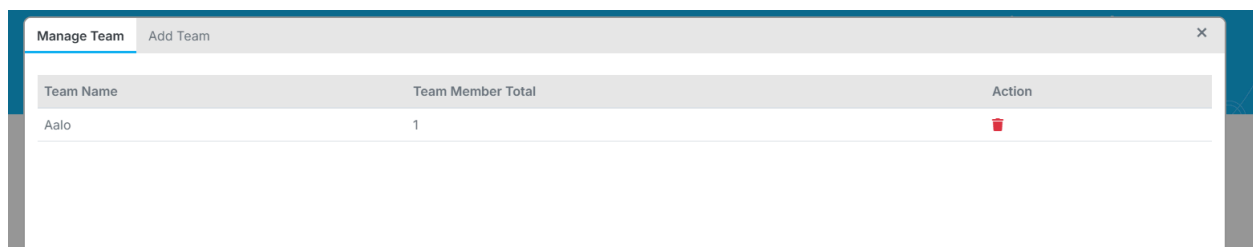
1. Look for the **Change Organization** dropdown in the top-right corner.
2. Select the organization you want to manage.
3. The page will refresh and show the teams, seats, and data for that organization.


### 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.



Team Name	Team Member Total	Action
Aalo	1	

*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**.

The screenshot shows a web form titled "Add Team" within a "Manage Team" window. The form contains the following elements:

- Team Name:** A text input field labeled "Enter Team Name \*".
- Team Leader Information:** Four text input fields: "Team Leader Firstname \*", "Team Leader Lastname \*", "Team Leader Username \*", and "Team Leader Email \*".
- Password:** A text input field labeled "PASSWORD:" with the value "lvfVJNsS".
- Course Selection:** Two lists of courses. The "AVAILABLE COURSES" list has a search bar "Search for names..." and one visible item: "GD&T Core Concepts Course". The "ACTIVE COURSES" list also has a search bar "Search for names..." and is currently empty. Two plus signs (+) are positioned between the lists, indicating a move action.
- Save Button:** A blue button labeled "Save" is located at the bottom right of the form.

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.

**Rodes Test** [Add Seats](#) [Add Team Member](#) [Import List](#) [Email Team](#)

Team Member Name	Username		Edit Team Member Information	
John Doe	john_doe@rode.com		<a href="#">Edit</a>	<a href="#">Change Password</a>

[Export CSV](#)

**Team Member Name**  **Course Name**  [Filter](#)

**Last Login Date:** Feb 24, 2026

Date / Time	Event
Feb 19, 2026 21:33 pm	Accessed eBook – Applications and Stacks Workbook
Feb 19, 2026 21:33 pm	Accessed eBook – GeoTol Pro 2020 Fundamentals Workbook

*Team Members view — header buttons and member list*

## 6a. Header Buttons

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

## 6b. Member List Table

Column	Details
<b>Team Member Name</b>	First and last name.
<b>Username</b>	Login username.
<b>Email Icon (✉)</b>	Click to email that member directly.
<b>Edit / Change Password</b>	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.

**Team Member Name**  **Course Name**

**Last Login Date:** Feb 24, 2026

Date / Time	Event
Feb 19, 2026 21:33 pm	Accessed eBook – Applications and Stacks Workbook
Feb 19, 2026 21:33 pm	Accessed eBook – GeoTol Pro 2020 Fundamentals Workbook

**Course:** GD&T Specialty Concepts Course ( 0% ) **Time spent:**  
00:00:00

Lock	Lesson	Completed On	Time Spent	
	Intro- GD&T Specialty Units Course Overview		00:00:00	▼
	Unit 7: Virtual Condition and Material Boundary Modifiers		00:00:00	▼
	Unit 8: Datum Reference Frame II - Datum Targets and Irregular Surfaces		00:00:00	▼
	Unit 9: The Datum Reference Frame III Advanced Concepts		00:00:00	▼
	Unit 10: Form Tolerances		00:00:00	▼
	Unit 11: Profile Tolerancing		00:00:00	▼

*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:

Firstname	Lastname	Username	Email	Action
John	Doe	john_doe@rode.com	john_doe@rode.com	Remove

*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.