

CADLearning Group Updates

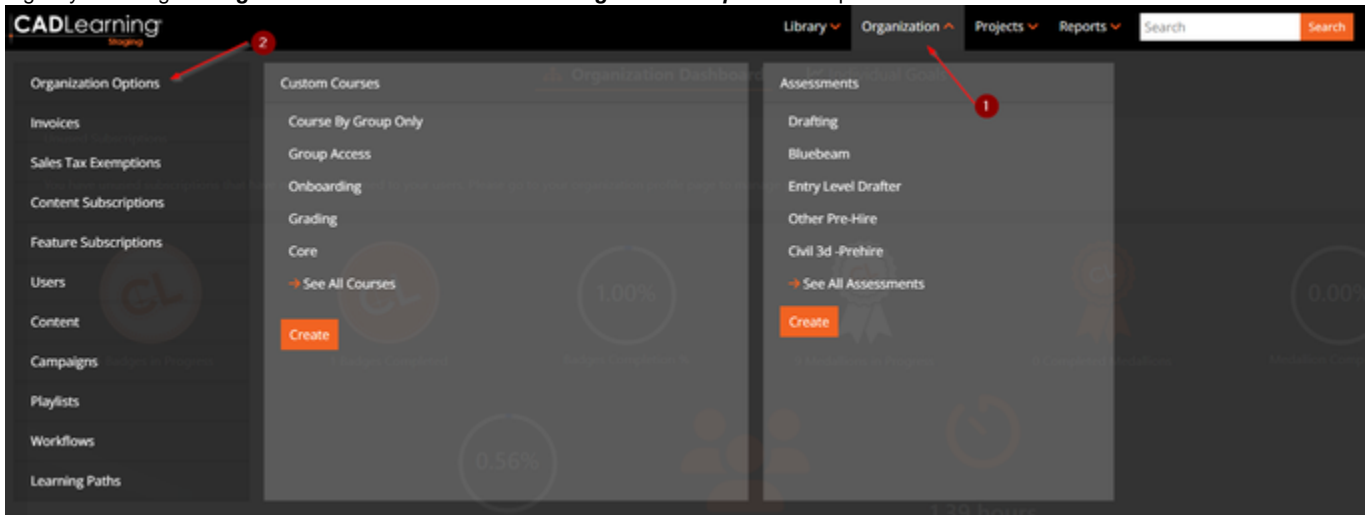
CADLearning Groups now give you full control of visibility in your organization.

Group Creation

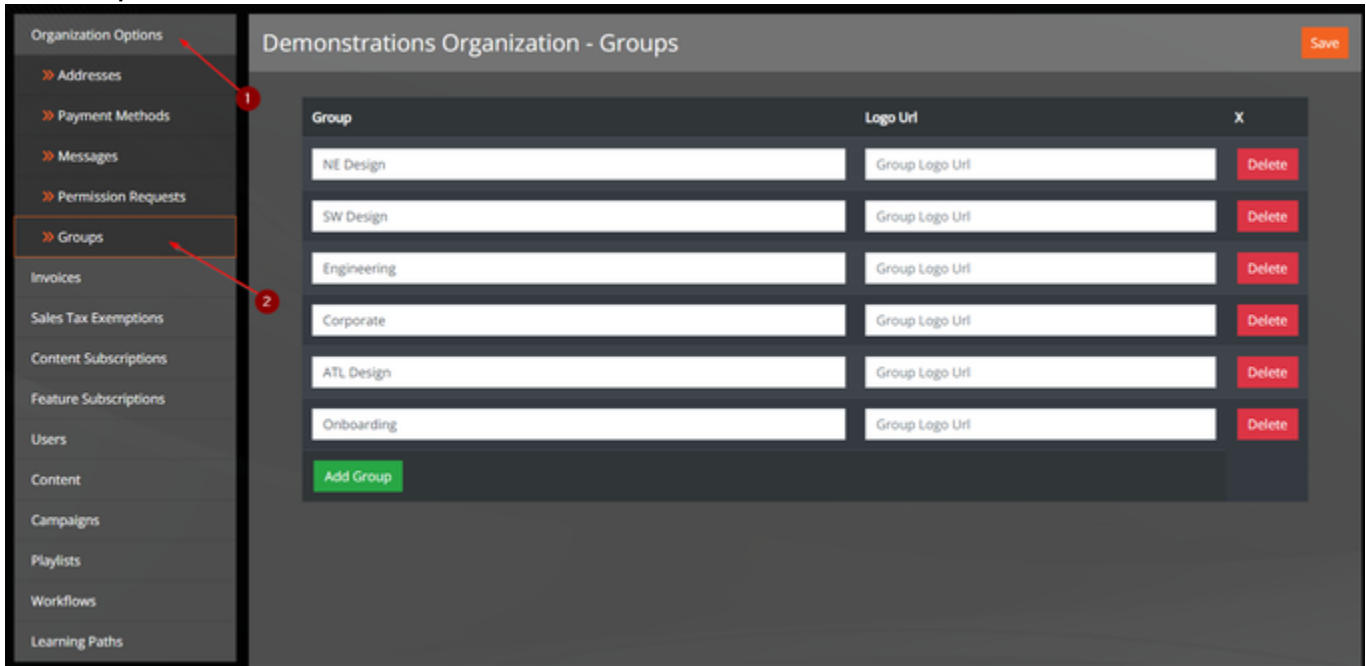
Groups are now defined for the organization on a new page, allowing admins to setup or modify groups without having to have a user assigned. Each group can now have a unique logo by adding an image link to the group.

To define groups, you will need to be an organization administrator.

Begin by selecting the **Organization** menu and then choose **Organization Options** to expand the sub menu.



Select **Groups** from the menu tree.



On this screen, you can click the "Add Group" button to create a new user group. Enter a name for the new group. The URL for a group logo is optional, enter that if applicable.

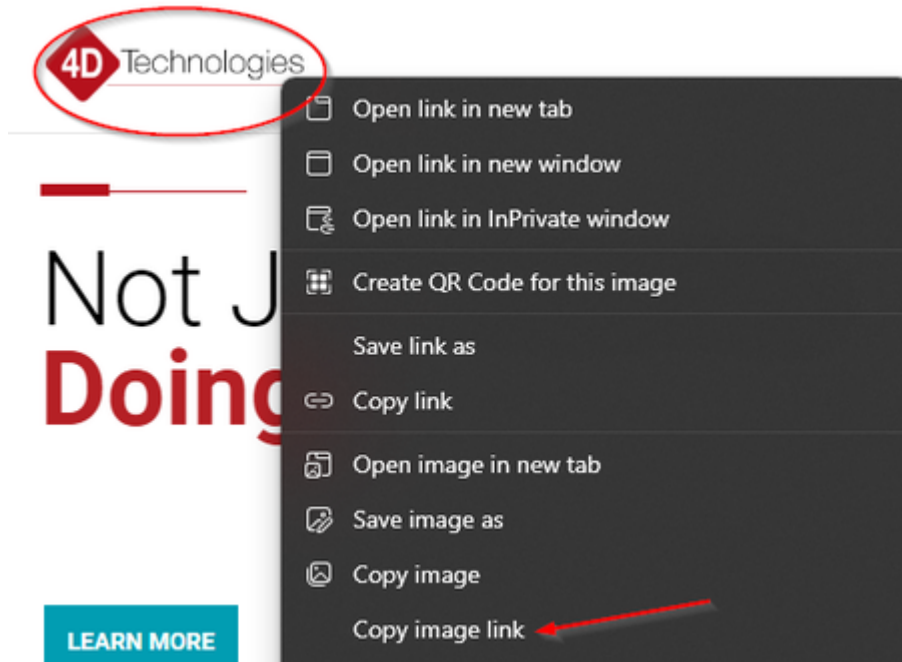
Demonstrations Organization - Groups

Save

Group	Logo Url	X
NE Design	Group Logo Url	Delete
SW Design	Group Logo Url	Delete
Engineering	Group Logo Url	Delete
Corporate	Group Logo Url	Delete
ATL Design	Group Logo Url	Delete
Onboarding	Group Logo Url	Delete

Add Group

For example, if you want to include a logo from a particular business unit, you can go to the website for that unit and pull the URL for the image. Once you find the logo on the website, right-click the logo and select "Copy image link" (The selection may vary based on your browser).



You can paste this link in the "Logo Url" field in the **Groups** menu. The logo will appear in portal for anyone assigned to that Group. Click the "Save" button to save your changes.

Demonstrations Organization - Groups

Save

Group	Logo Url	X
NE Design	Group Logo Url	Delete
SW Design	Group Logo Url	Delete
Engineering	Group Logo Url	Delete
Corporate	Group Logo Url	Delete
ATL Design	Group Logo Url	Delete
Onboarding	Group Logo Url	Delete
1 4D Technologies	2 https://www.4dtechnologies.net/wp-content/uploads/	Delete

Add Group

You can modify a group name or logo at any time, just update the text and click "Save" to capture your changes.

You can delete any existing group at any time by clicking the "Delete" button for that row. This will remove the group name from all users it is currently assigned to. Click "Save" to capture your changes.

Demonstrations Organization - Groups

Save

Group	Logo Url	X
NE Design	Group Logo Url	Delete
SW Design	Group Logo Url	Delete
Engineering	Group Logo Url	Delete
Corporate	Group Logo Url	Delete
ATL Design	Group Logo Url	Delete
Onboarding	Group Logo Url	Delete
4D Technologies	https://www.4dtechnologies.net/wp-content/uploads/	Delete

Add Group

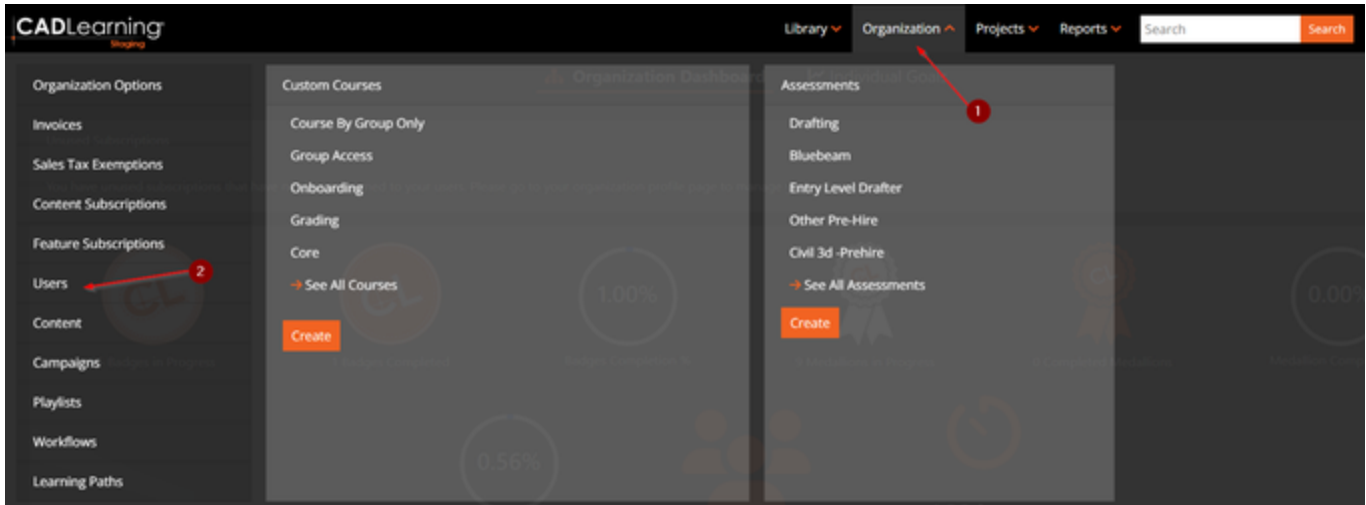
Note: New groups must be created from the Organization Options menu and can no longer be created on the fly from the user screen.

Group Security Permissions

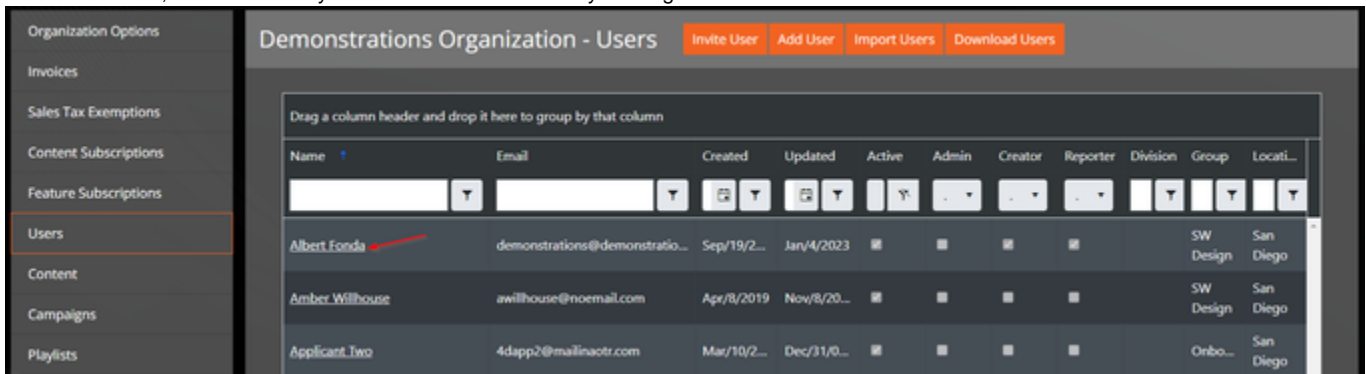
New security role options have been added for the *Reporting*, *User Admin*, *Content Creator*, and *Learning Path Administrator* roles to restrict access to the user groups the admin has been added to. This new functionality essentially allows for group administrators.

These options are found on the edit user screen. To access that screen, you must be an organization administrator.

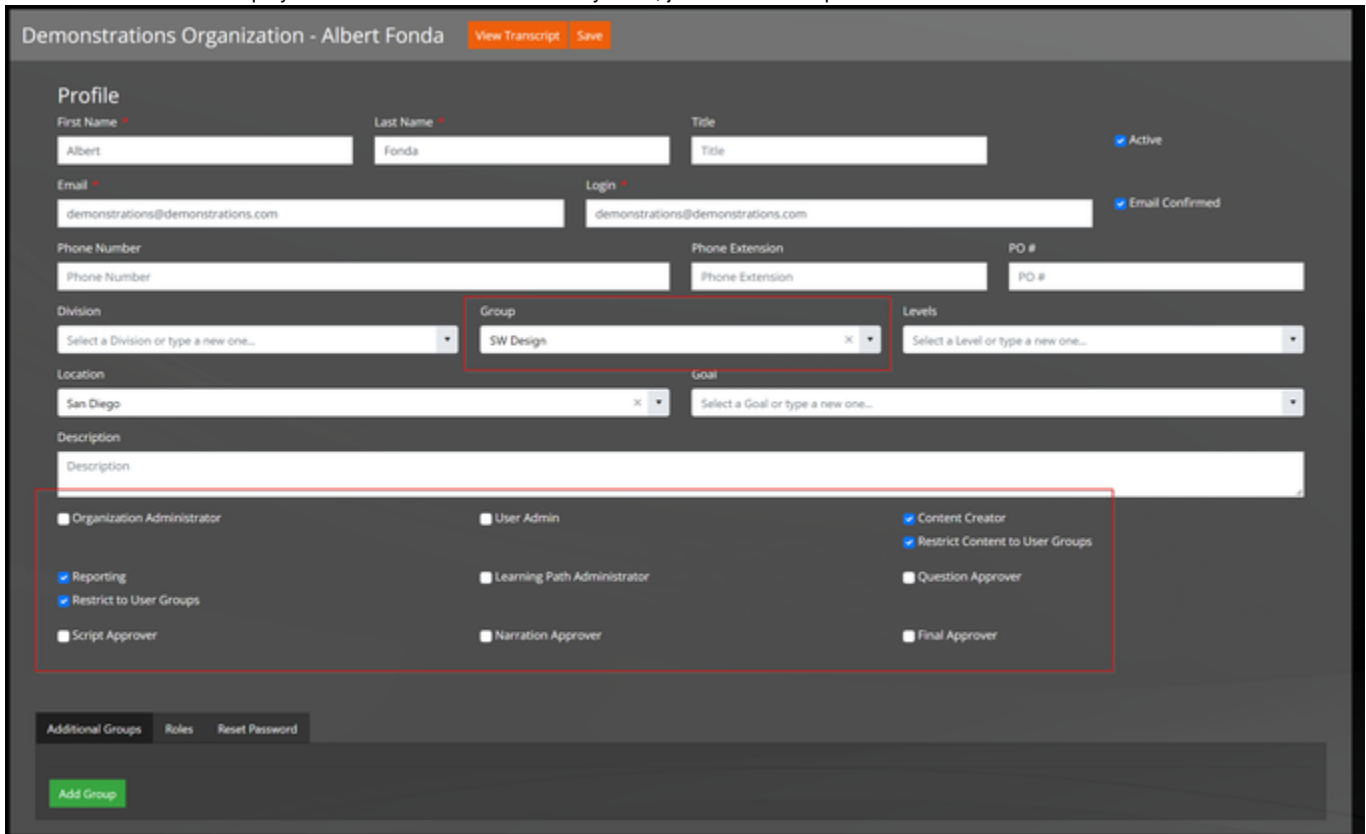
Begin by selecting the **Organization** menu, and then selecting the **User** menu option.



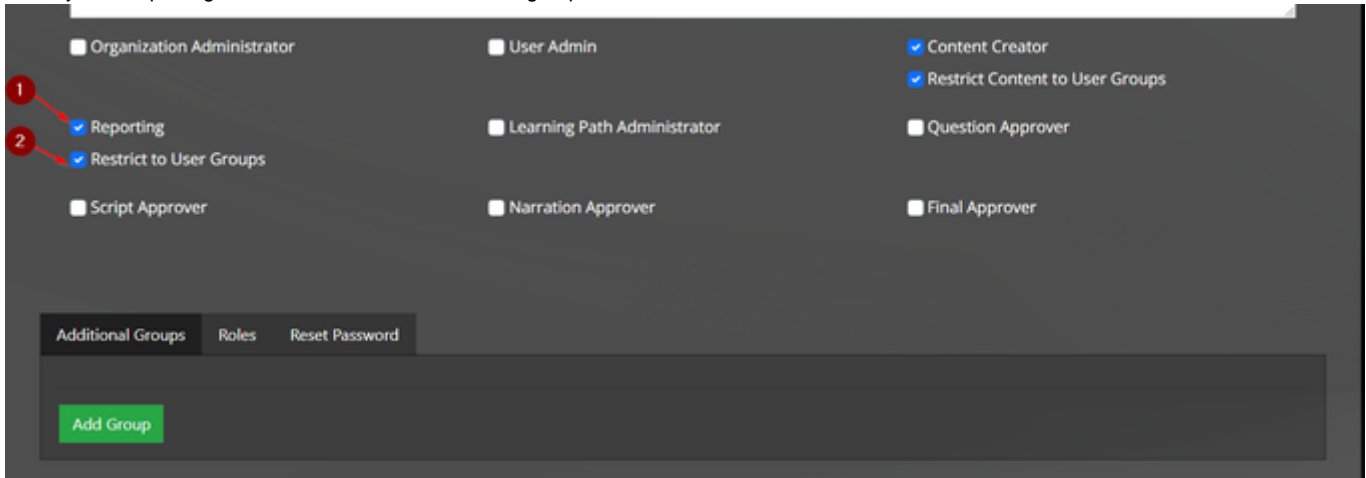
From the user list, select the user you would like to work with by clicking on the user's name.



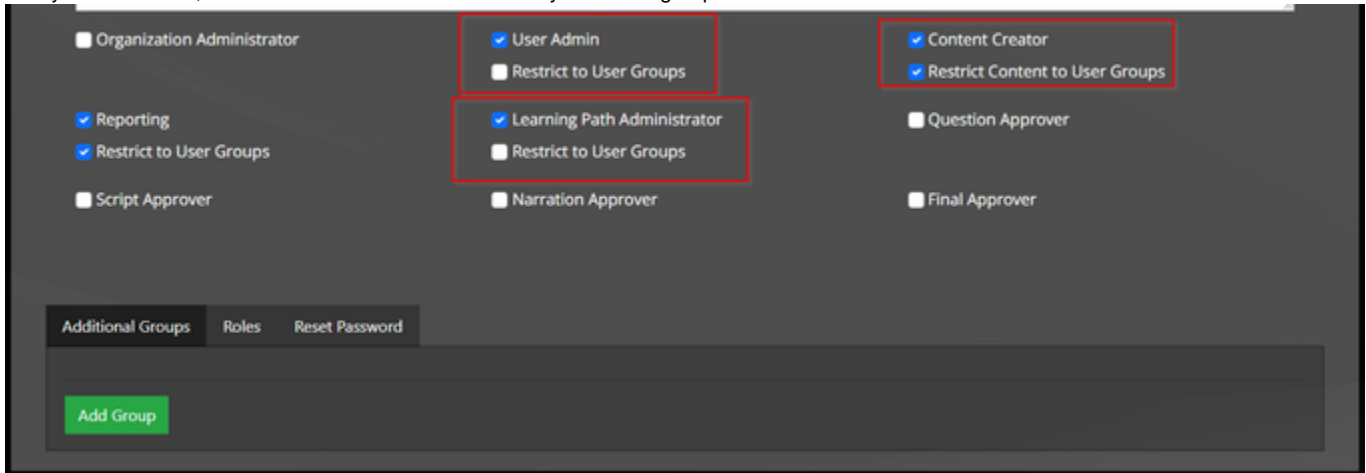
The *Edit User* screen is displayed. Look to the area with security roles, just beneath the profile details.



If you check the box for *Reporting*, a new box appears beneath it to allow you to *Restrict to User Groups*. Check this box to ensure that the user can only view reporting data on other users in the same group.

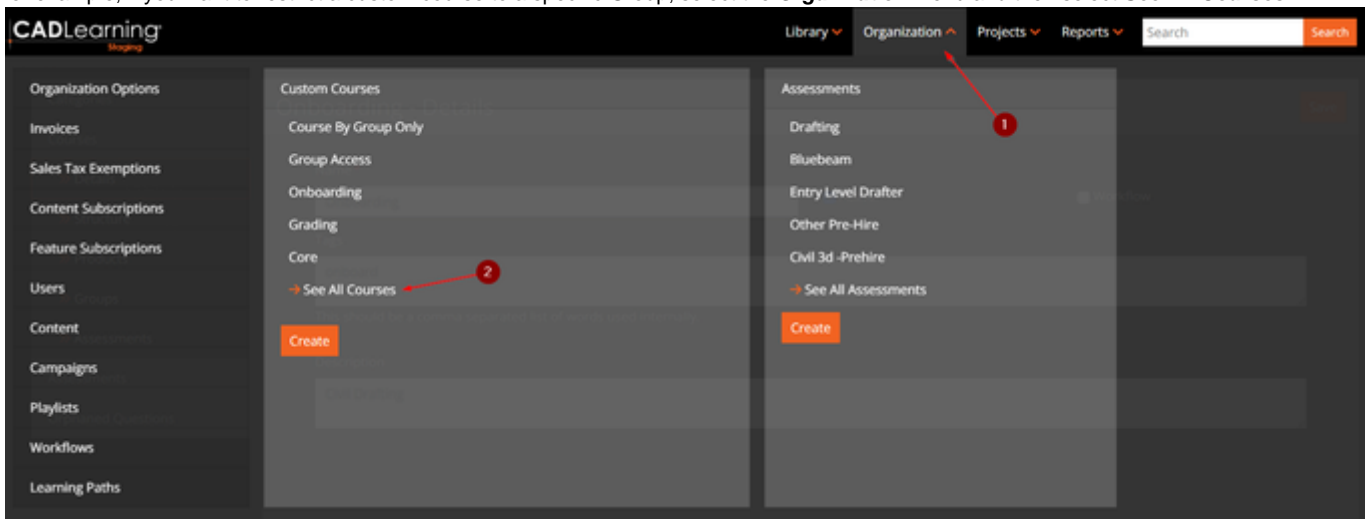


The same option is available for the User Admin, Content Creator, and Learning Path Administrator roles. By checking *Restrict to User Groups* for any of these roles, access will be limited items owned by the same group the user is in.

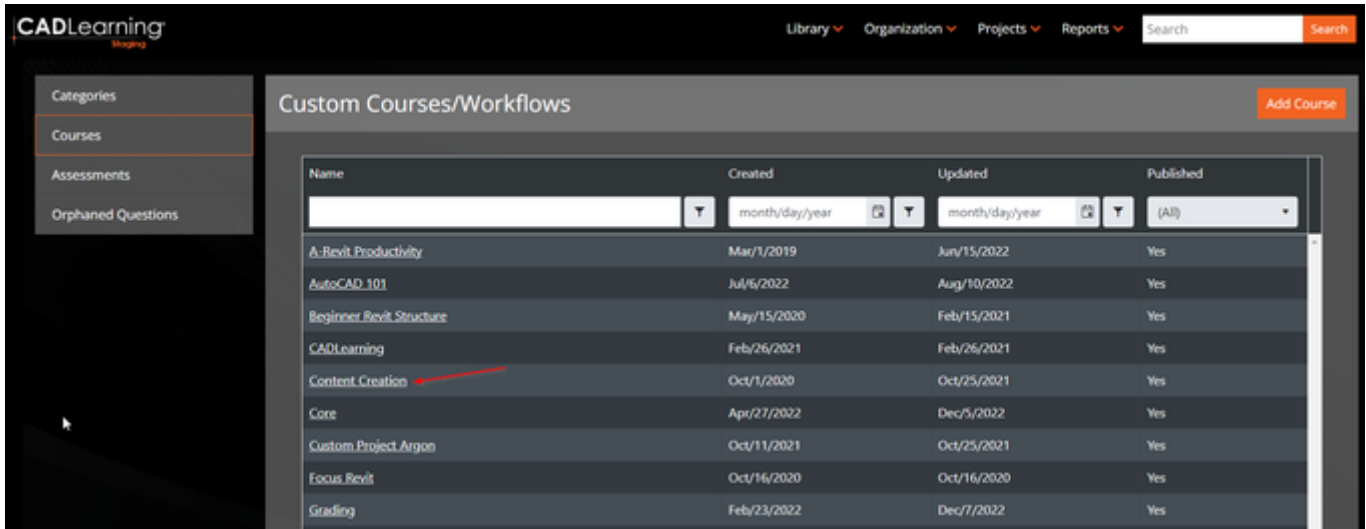


This ensures that each group can have unique custom courses, assessments, goals, and roles that can only be modified by the appropriate content creators and learning path administrators. To achieve this, a new tab for *Group* definition has been added to the screens for each of those entities.

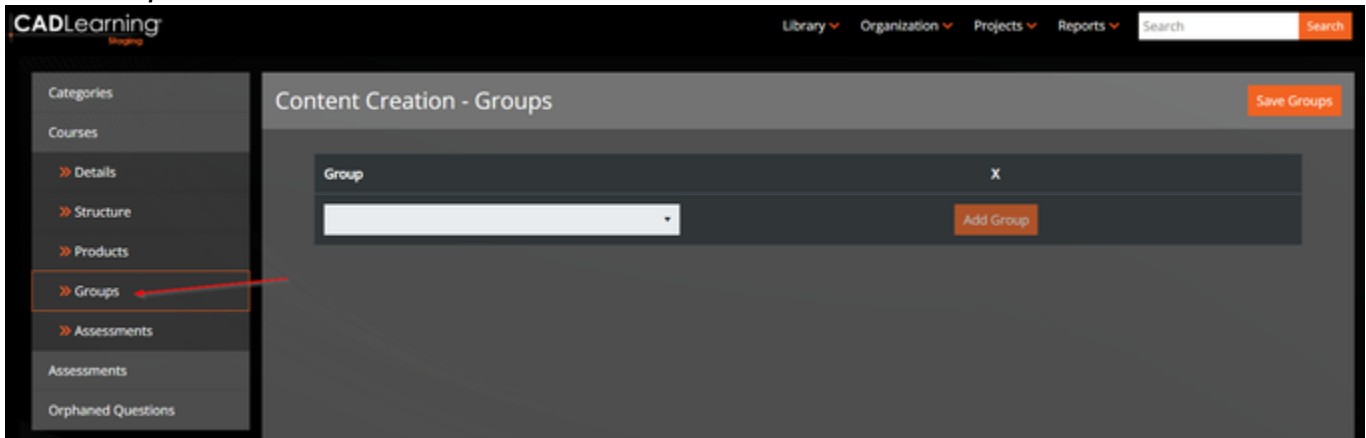
For example, if you want to restrict a custom course to a specific Group, select the **Organization** menu and then select **See All Courses**



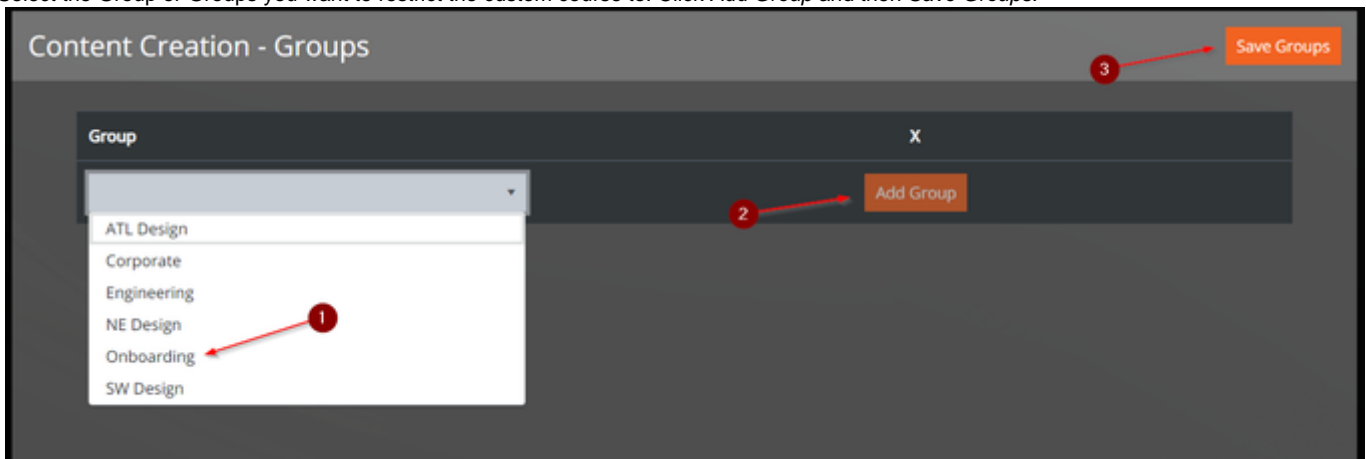
Select the course you want to add Groups to.



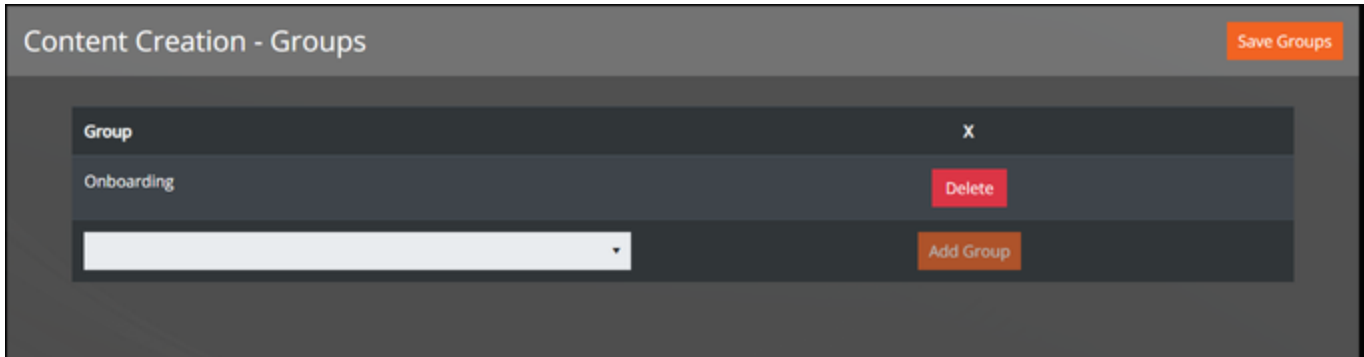
Select the **Groups** menu



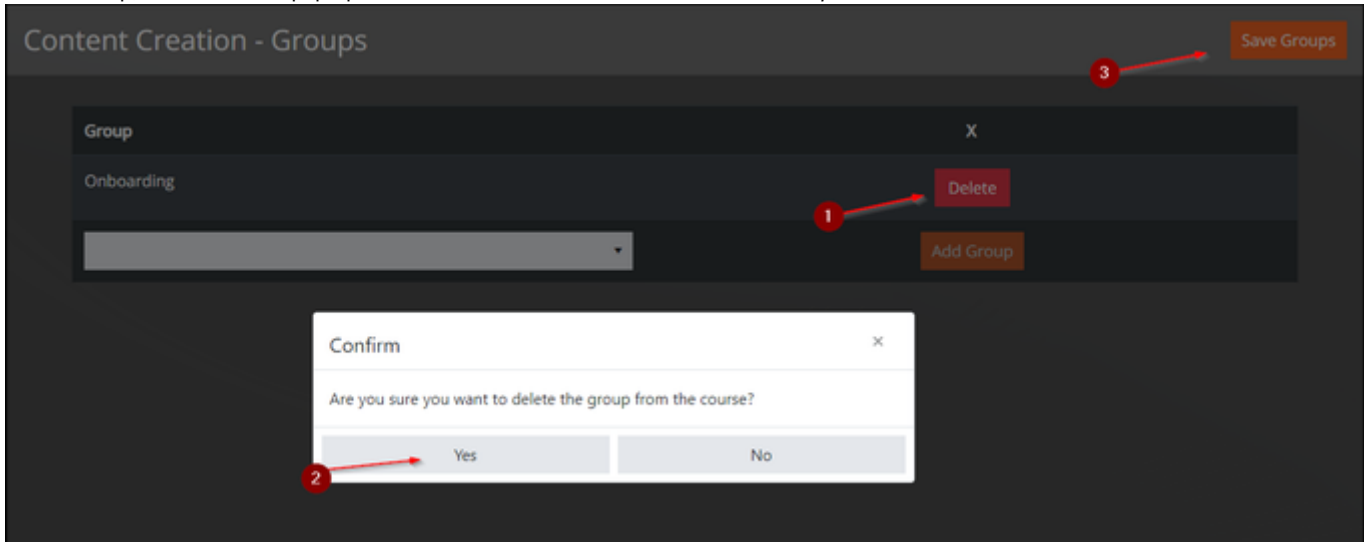
Select the Group or Groups you want to restrict the custom course to. Click *Add Group* and then *Save Groups*.



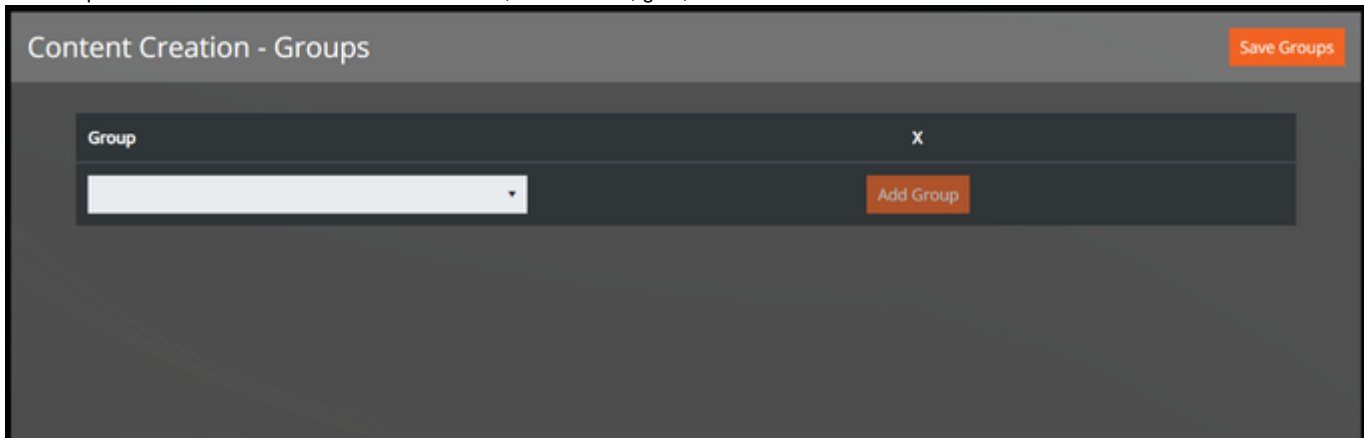
Once you have saved the Group, the menu will appear like this.



You can also remove Groups from custom courses, assessments, goals, and roles at any time. All you have to do is click *Delete* next to the desired Group, click *Yes* in the pop-up confirmation window, and then select *Save Groups*.



The Group restriction will be removed from the course, assessment, goal, or role.



Need help creating your groups? Contact us at customersuccess@cadlearning.com.