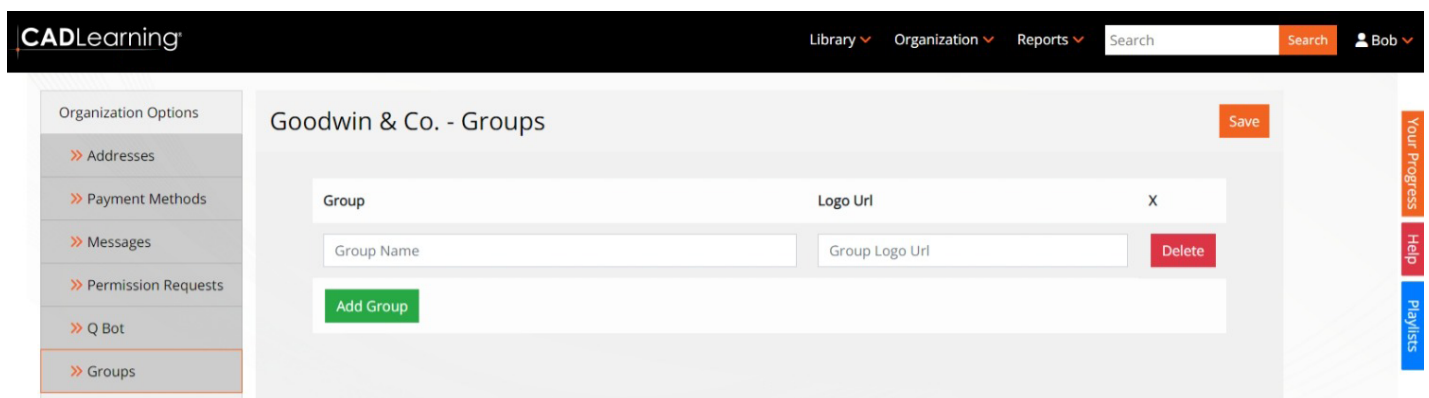


# January 2023 Release FAQs

## Groups and Roles

### How do I create a new group?

Organization Administrators can build out groups by expanding the Organization tab and selecting Organization Options. Choose Groups. Here, you can add groups and input an image URL to display a unique logo for each group. Click Save.



### Where do I find an image URL?

A logo URL can come from several places. Right-click on a website logo and choose Copy Image Link, or store an image in any database that can generate a public link.

### What does the image URL do?

The image URL lets your teams, offices, business units, or subcontractors customize their portal with their unique branding.

### What happens if I restrict Reporting, User Administration, Content Creation, or Learning Path Administrator Roles by User Group?

On the Organization drop-down, Users tab, when you select the Reporting, User Administration, Content Creation, or Learning Path Administrator Role, you will now see an option to Restrict by User Group. By selecting this, a user will only receive the appropriate permissions for the groups they have access to, not for the entire organization. This gives organizations full control over how they allocate permissions to their role. For example, any custom content created by a user set as Restricted by Group, will only appear in that group, not in the full organization's library.

# January 2023 Release FAQs

## What does the new Learning Path Administrator permission do?

Based on customer feedback, the new Learning Administrator role carves out the ability to create and assign roles and goals from the Custom Content Creator role. Now, you can choose whether administrators can build roles, custom courses, or both.

## How can I add multiple people to a group?

You can use the import function to bulk update existing users. Simply download the available template, add the users you want to update (email address, first name, last name), and fill in the group field. Then import that file, and the system will match the user by email address and update the record with the new data. Please note that bulk uploads only work for one group. They must be added manually to additional groups.

## What happens if I delete a group?

If you choose to delete a group, that group will be removed from all user accounts.

## Can someone be in more than one group?

Yes, a user can be in multiple groups. On the user detail screen, in the lower section of the screen, you can define Additional Groups for a user. Please note that users have the same permissions in any group they are added to.

## Organization Dashboard

### What are the icons at the top?

These widgets provide at-a-glance information about trends in your organization, answering questions like:

- How many badges and medallions are in progress?
- How many are complete?
- How much time did I save?

If you have a widget you would like to add, [let us know](#).



# January 2023 Release FAQs

## Pop Quiz

### Why would I want to skip a question?

Skip allows you to bypass a question and move on to the next if you are unsure of the answer. If you do not know the answer and happen to guess it correctly, it will be removed from your learning path too early.

#### Pop Quiz!

How do you alternate between the Trim command and the Extend command?

- ☐ use the shortcut menu
- ☐ click with the left mouse button when done
- ☐ right-click or press ENTER on the keyboard
- ☐ press and hold the SHIFT key

[Submit Answer](#)[Skip](#)

## User List

### Why don't I see all of the users in my organization?

This could be due to a filter you have saved on-screen. Be sure to check the column headers for any filters you may have applied.

This could be due to security settings. You may only have permission to see users in your group.

### How do I download a list of all of my users?

You can click the orange button for a download of all users.

If you have reporting permissions, you can access the Reports menu to download all user data in a raw format.

## Reports

### Why don't I see reports in the Organization menu?

Reports now have a dedicated menu, and you can access them from there.

### What happens if I save a report?

Any changes you have made will be saved, so the next time you view that report the settings will still be there.

### What happens if I choose Save As?

Save As allows you to create a custom version of the report in addition to the original. This allows you to save numerous configurations.

# January 2023 Release FAQs

## Where do I view my saved reports?

From the Reports menu, look to the right-most column and choose Custom Reports.

## How do I schedule report delivery?

For any report that offers scheduled delivery (and yes this includes your custom versions!), look for the orange button near the top of the screen labeled “Schedule Report Delivery.” Clicking that button will open a dialog box where you can define the frequency and recipients for your report delivery.

## What do the Clear to Save and Clear to Default buttons do?

Click Clear to Save to revert to the last saved version of the report.

Click Clear to Default to remove all saved changes and return the report to its original state.

## What do the settings drop-dows mean?

- **Type** allows you to adjust the type of visual onscreen
- **Grouping** allows you to adjust the default grouping for the report
- **Y-Axis** allows you to adjust how the groupings are being measured
- If the **Y-Axis** has a data type with more than one calculation option, a new box appears to allow you to set the aggregate
- **Aggregate sort** determines the sorting for the data on-screen

## Can I adjust the columns in the report?

Yes! You can add or remove columns to suit your needs by clicking the menu next to any column title.

You can also sort or filter the data in any column.

## Can I group my data by more than one column?

Yes! You can add additional groupings by dragging and dropping the column of choice to the group section at the very top of the report. You can even choose which group is first by arranging those column fields.

# January 2023 Release FAQs

## Benchmarking

### How can I adjust the metrics you can see in the Benchmarking panel?

Organization Administrators can select which benchmarks they would like their users to see. To change the view, expand the Organization menu, and choose Organization Options. On the Score Settings drop-down, you can select:

- **Own** to show just the user's personal score
- **Organization** to show the user's individual score and the organization's score
- **Industry** to show the user's individual score, the organization's score, and the average score of everyone in that industry

### Why don't I see any Role and/or Goal stats?

You will begin to see progress toward your role once you have completed a badge.

### Why don't I see an Organization or Industry score?

Administrators can choose to hide organization and industry scores.

### What does the Organizational Score mean?

The organization score shows the progress that all users in your organization have made toward the selected goal.

### What does the Industry Score mean?

The industry score shows the progress that all users across that industry have made toward the goal.

## Industries

### What is an industry?

Industries make it easier for you to find the best goals for your users to work on. Just select the industry you work in, and a list of related Goals appears. Looking for a goal that you built for your company? You will find it in Custom. Want it moved? Just [contact us](#) and we will help you out.



# January 2023 Release FAQs

## How do I add additional industries?

[Contact us](#) to request a new industry. Please note that industries will be visible to all customers, so must be approved by the content team. We are evaluating custom industries for future releases, so please let us know your thoughts.

## How can I view a full list of Goals?

Once you have selected a Goal, you can view all Goals available to you by selecting Add Goal at the top of the dashboard, just under the Your Roles and Goals header.

Your Roles and Goals

+ Add Goal

You can choose a Goal from the dropdown. Click Add Goal to add it to your dashboard.

## What is the Custom industry?

The Custom industry includes all the custom Goals your organization has built. [Contact us](#) to have them moved to another industry.

## Have Questions? Need Help?

We're here if you need us: [customersuccess@cadlearning.com](mailto:customersuccess@cadlearning.com)