Team view

Ester Andersson - 2024-07-23 - Functions

With Team View, the team manager has more responsibility and easier access to information about the team and its learning progress. They also get permission to view specific users' course statuses more in-depth.

Available from: Professional

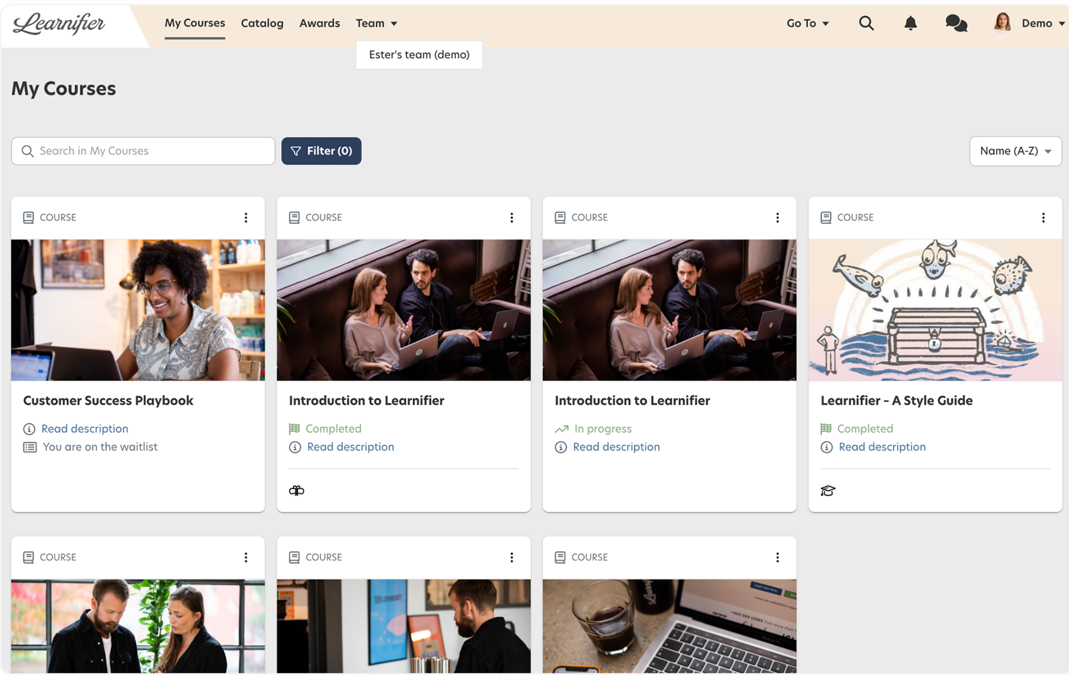
Note

- Introduction
- How does a team manager enroll members in courses?
- How to send course applications to the team manager?

Introduction

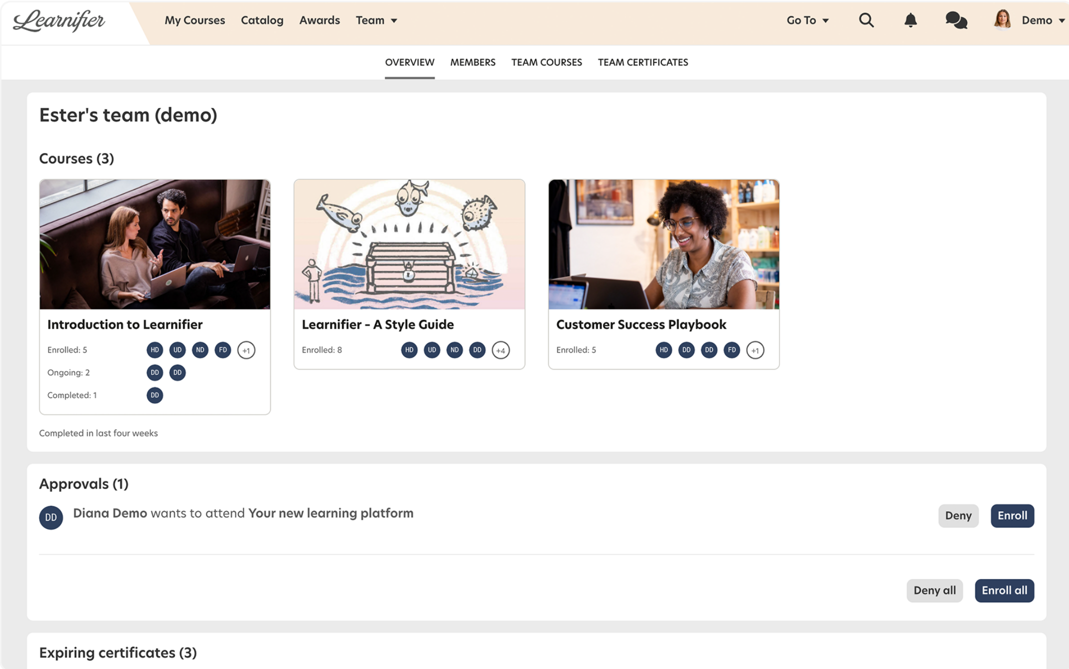
1. **Enter Team View**

To enter the team view portal, log in as a learner. If you are a team manager, you will see the “Team” tab where you can choose your team.



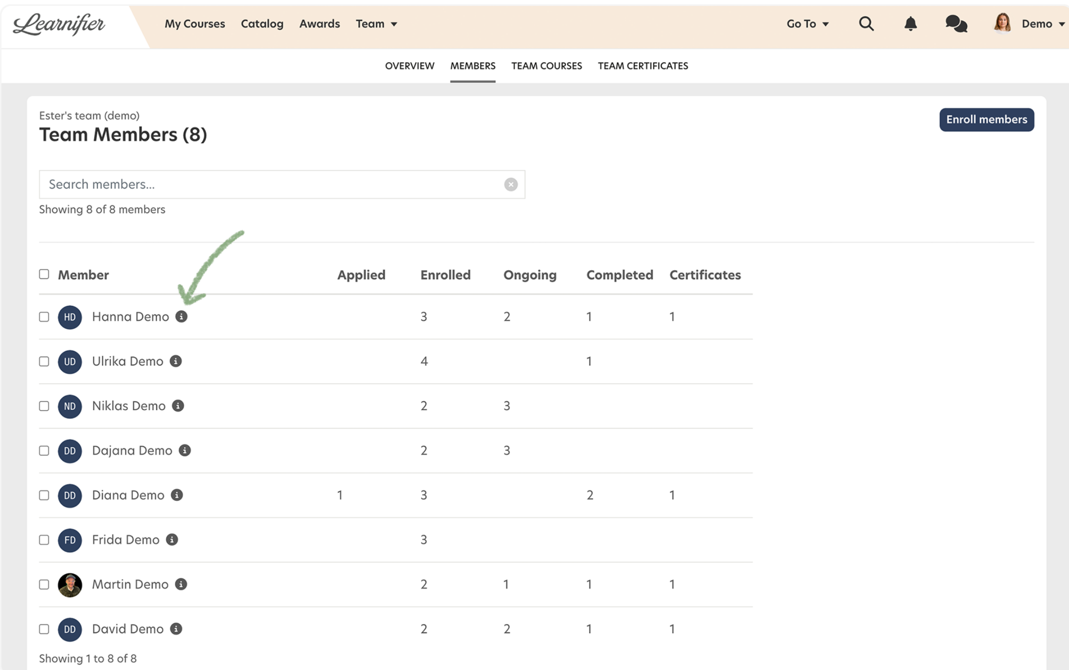
1. **The “Overview” tab**

On the overview tab, you will get an overall overview of how it’s going for your team members. For example, under “Courses” you will see how many have applied, enrolled, and completed specific courses. Under “Approvals”, you can deny or enroll members’ course applications.



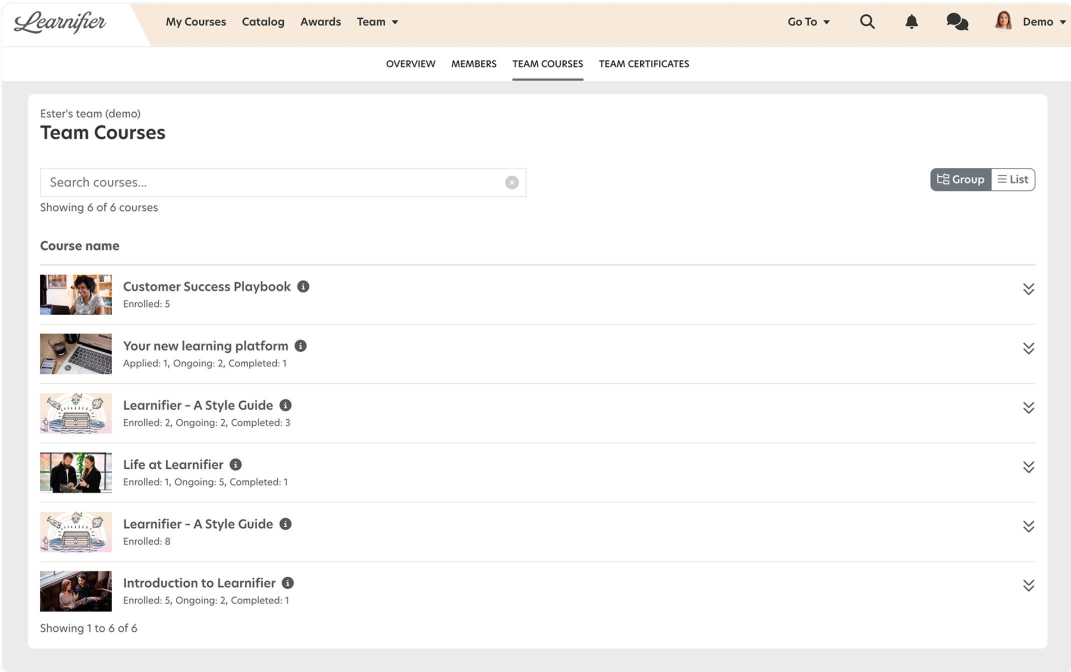
1. **The “Members” tab**

Under the “Members” tab, you can access more information about a member’s learning progress by clicking on the “I” button.



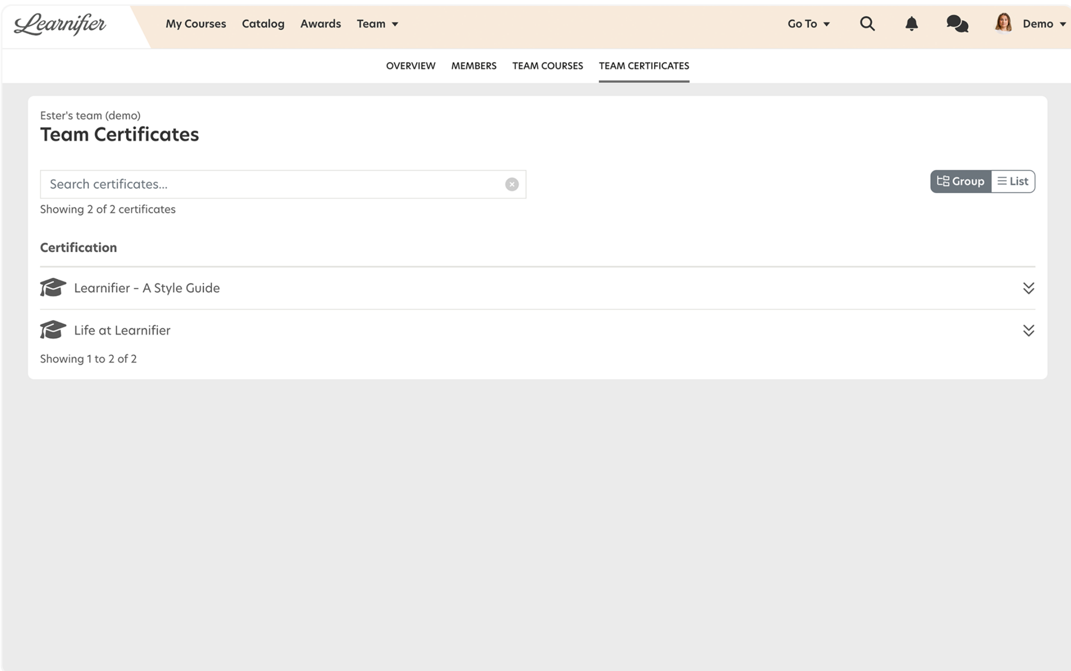
1. **The “Team courses” tab**

Under the “Team courses” tab, you will find all courses your members are enrolled in.



1. **The “Team certificates” tab**

Under the “Team certificates” tab, you will find all certificates your members have.

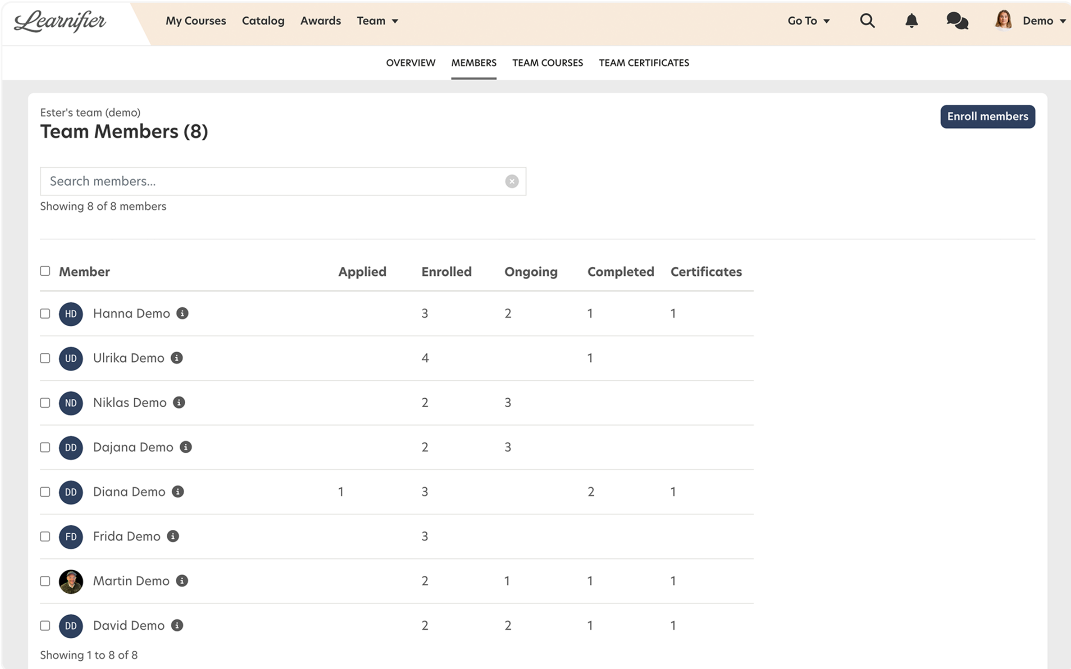


How does a team manager enroll members in courses?

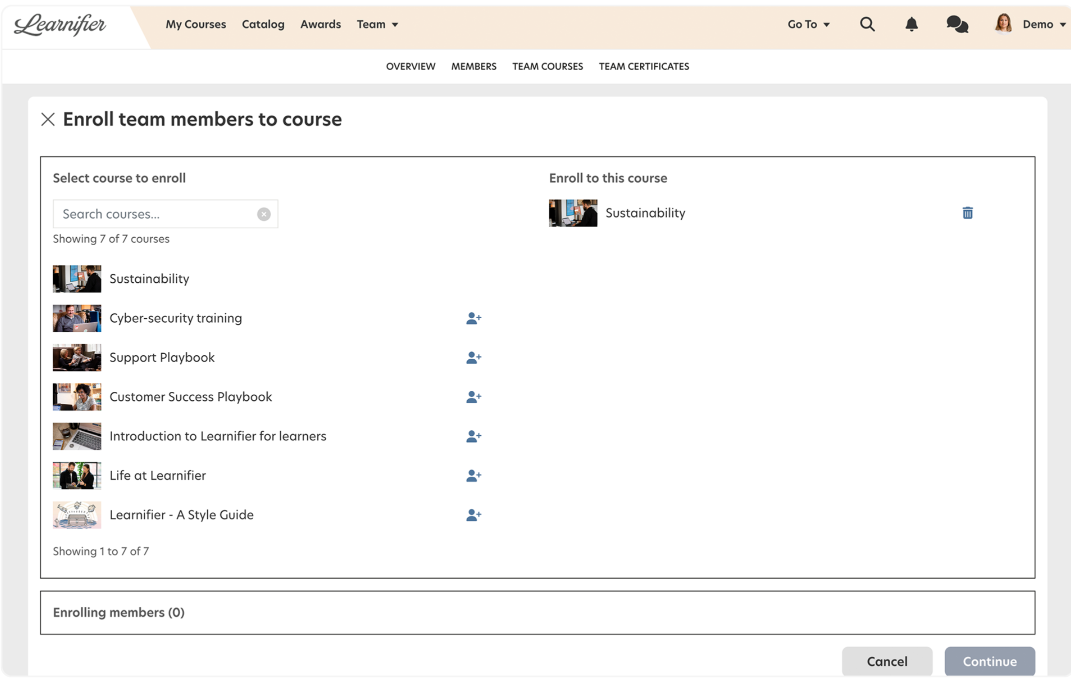
1. In order for a team manager to enroll members in a course, the administrator must first make sure the course is managed by Team View.

    1. Go to the project from the administrator interface
    2. Under the “Settings” tab, check the box “Managed by team”.

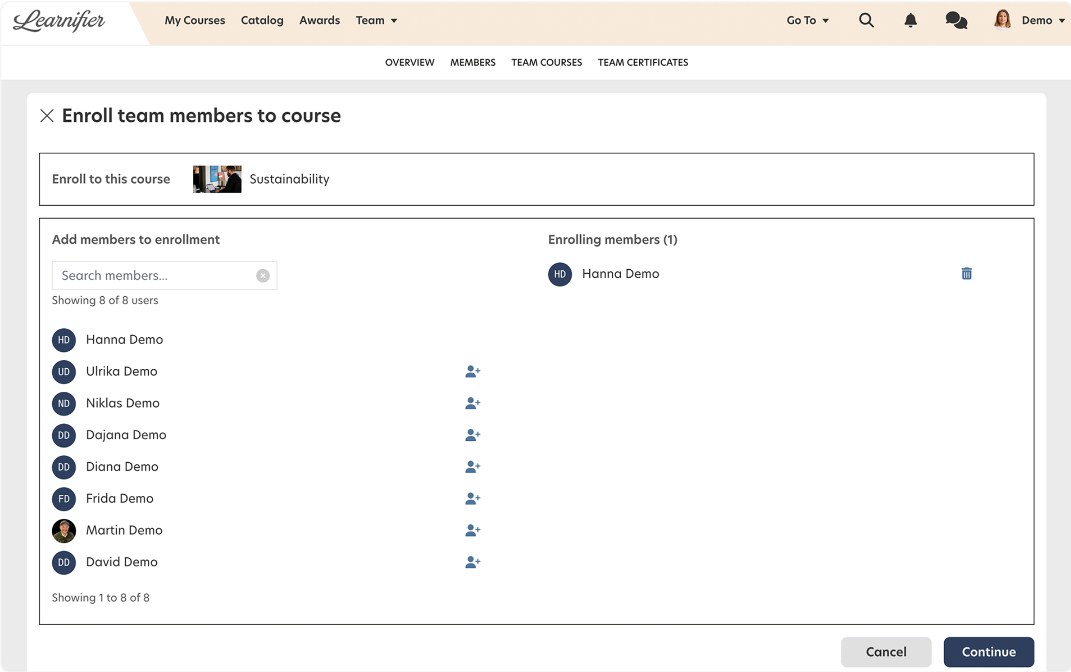
2. To enroll a member in a course, go to the "Members" tab.



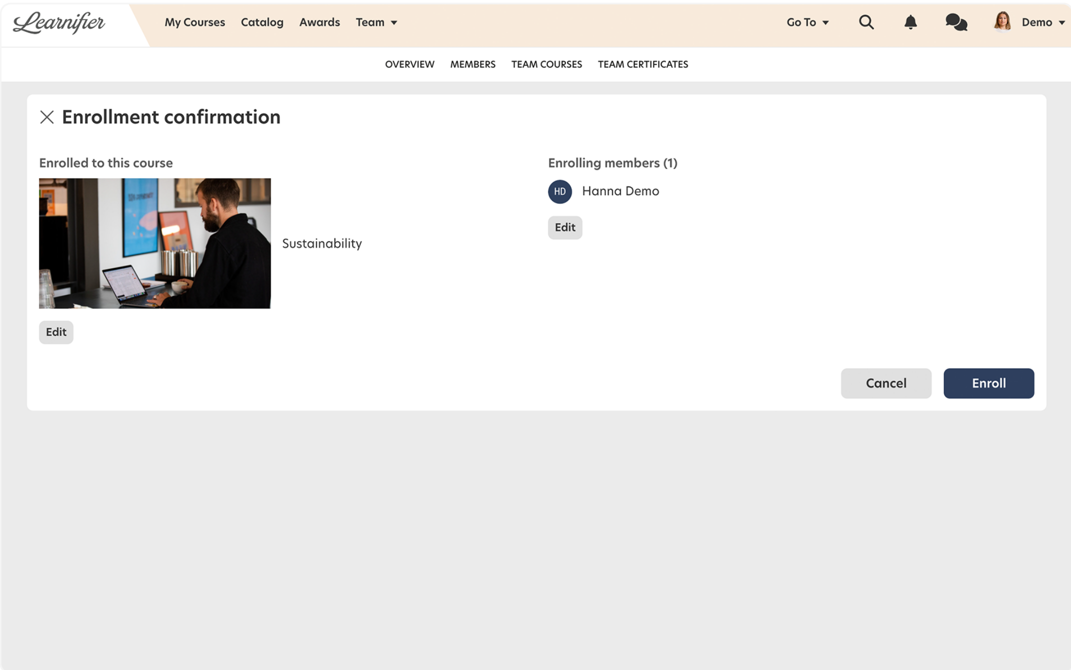
1. Click on "Enroll members" and select the course(s) you want to register for.



1. Under "Add members to enrollment," choose the members you want to register and click “Continue”



1. Confirm your registrations by clicking on "Enroll".



How to send course applications to the team manager?

1. In order for a team manager to enroll members in a course, the administrator must first make sure the course is managed by Team View.
    1. Go to the project from the administrator interface.
    2. Under the “Settings” tab, check the box “Managed by team”.
2. Go to the Catalog builder and enter the course settings.
3. Under “Enrollment”, choose “Moderated”.
4. Under “Visibility”, choose “Active”.

Tip: Would you like the team manager to receive a notification when one of their members has applied for a course?

1. Create an automated communication with the following trigger (with “Team manager” as audience)
    1. “Participant” → “Status” → “Is not activated” and “Participant” → “Source” → “Is Course catalog”.

Tip: Would you like the team member to receive a notification when their request has been accepted?

1. Create an automated communication with the following trigger (with “Participant” as the audience)
    1. “Participant” → “Status” → “Is activated” and “Participant” → “Source” → “Is Course catalog”.