

## 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

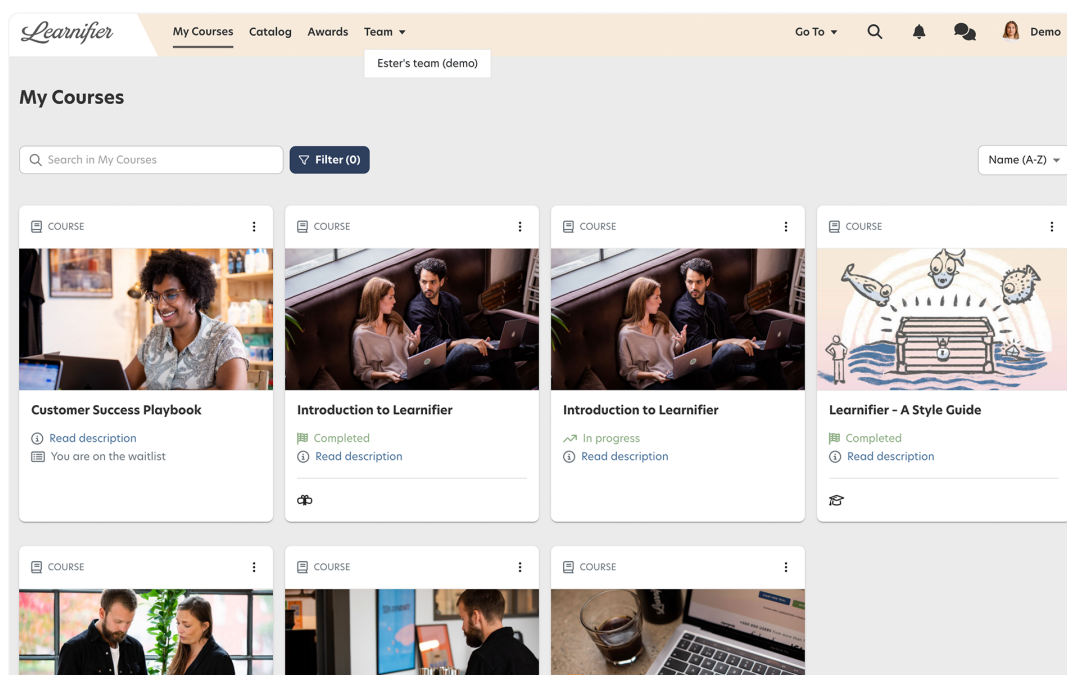
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## Introduction

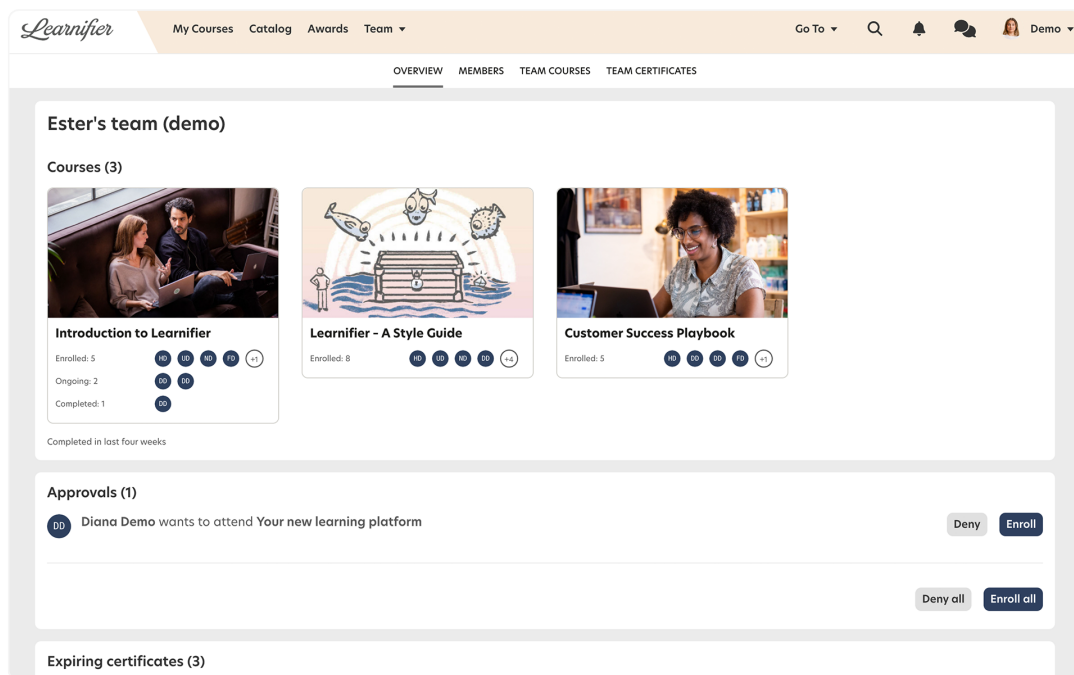
### 1. Enter Team View

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.



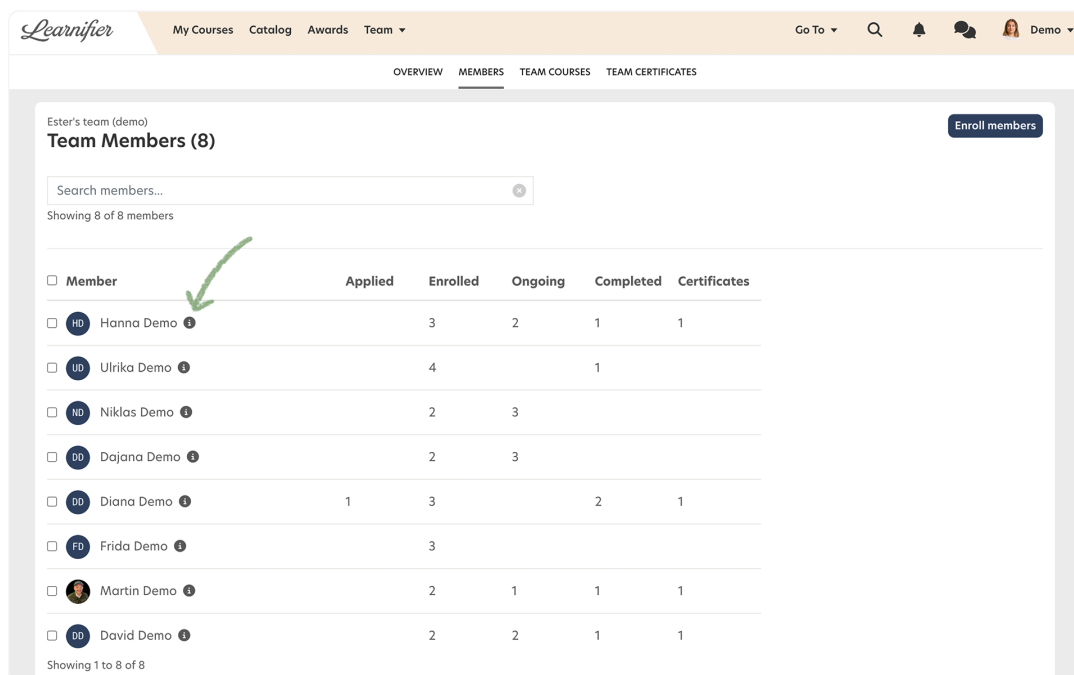
### 1. The “Overview” tab

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.



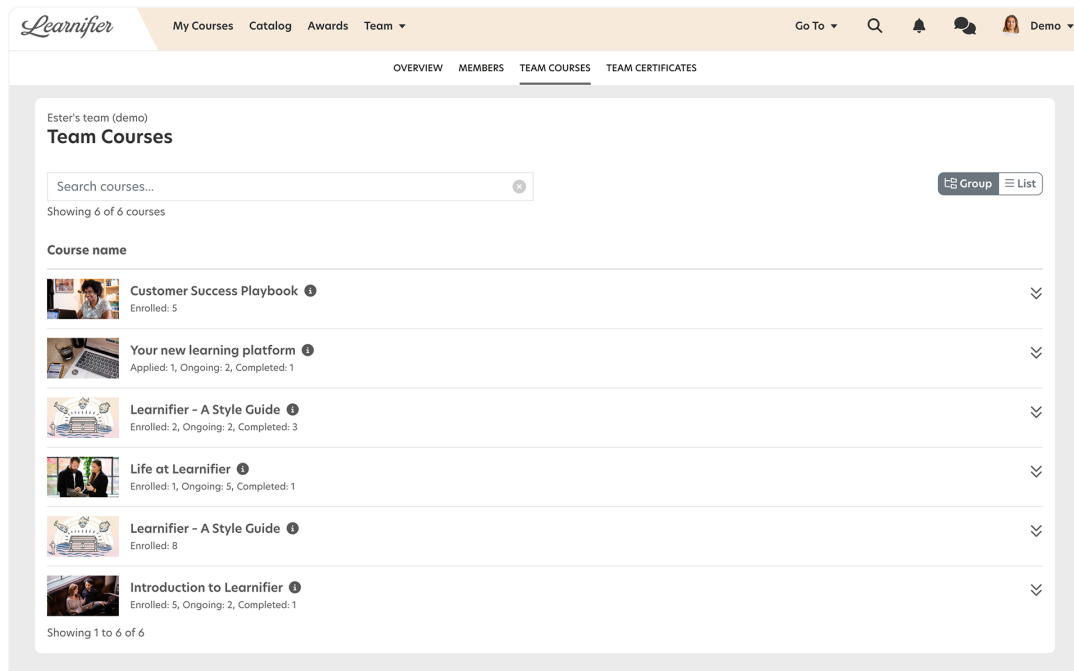
## 1. The "Members" tab

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



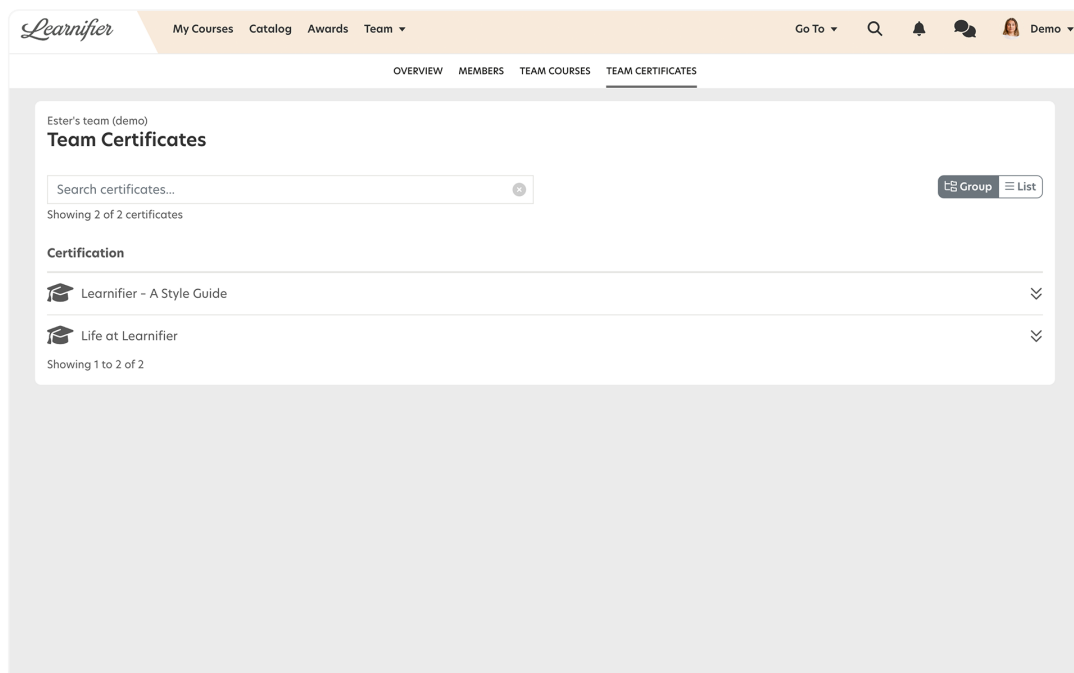
## 1. The "Team courses" tab

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.

Ester's team (demo)  
**Team Members (8)** Enroll members

Search members...  
 Showing 8 of 8 members

<input type="checkbox"/> Member	Applied	Enrolled	Ongoing	Completed	Certificates
<input type="checkbox"/> HD Hanna Demo		3	2	1	1
<input type="checkbox"/> UD Ulrika Demo		4		1	
<input type="checkbox"/> HD Niklas Demo		2	3		
<input type="checkbox"/> DD Dajana Demo		2	3		
<input type="checkbox"/> DD Diana Demo	1	3		2	1
<input type="checkbox"/> FD Frida Demo		3			
<input type="checkbox"/> Martin Demo		2	1	1	1
<input type="checkbox"/> DD David Demo		2	2	1	1

Showing 1 to 8 of 8

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

× Enroll team members to course

Select course to enroll

Search courses...  
 Showing 7 of 7 courses

- Sustainability
- Cyber-security training
- Support Playbook
- Customer Success Playbook
- Introduction to Learnifier for learners
- Life at Learnifier
- Learnifier - A Style Guide

Showing 1 to 7 of 7

Enroll to this course

Sustainability

Enrolling members (0)

Cancel Continue

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

The screenshot shows a web interface for enrolling team members into a course. The course is titled "Sustainability". The "Add members to enrollment" section contains a search bar and a list of 8 users: Hanna Demo, Ulrika Demo, Niklas Demo, Dojana Demo, Diana Demo, Frida Demo, Martin Demo, and David Demo. The "Enrolling members (1)" section shows that Hanna Demo has been selected. At the bottom right, there are "Cancel" and "Continue" buttons.

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

The screenshot shows the "Enrollment confirmation" dialog. It displays the course "Sustainability" with a thumbnail image of a person at a computer. The "Enrolling members (1)" section shows Hanna Demo with an "Edit" button next to her name. At the bottom right, there are "Cancel" and "Enroll" buttons.

## **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”.