

Wellness Wave Surfing

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Team view 4

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Accessing Team View

To access Team View, log in as a Learner.

If you have manager permissions, you'll see a Team tab in the main navigation.

Click it to access your team or teams.

Team View Dashboards

Team View offers three dashboards: **Team Dashboard**, **Individual Member Dashboard**, and **Course-Specific Dashboard**



Each dashboard includes:

- **Engagement** (pie chart) - visualises the current overall participation status.
- **Engagement over time** (line graph) - tracks changes in participation over time.
- **Requests** - number of pending enrolment requests. Click to view and manage.
- **Not started** - shows enrolments that members haven't started yet. Click to get a detailed list.
- **Expired certificates** - number of expired certificates. Click to get a detailed list.
- **Certificates expiring within 28 days** - highlights upcoming expirations. Click to get a detailed list.

Members Tab

The Members tab provides a **Team Dashboard** and lists all your team members along with their learning progress.

[Image]

From the member overview, you can quickly **enrol**, **unenrol**, or **add members to a waitlist** for specific courses. Select one or more members to perform an action.

[Image]

Use **Filter** to find specific courses.

[Image]

Individual team member

Click a member's name to:

- Access the **Individual Member Dashboard** to view overall progress and status.
- View detailed course progress and status.
- Enrol, unenrol or add to waitlist for a specific course.
[Image]

Courses Tab

Under **Team Courses**, you'll find all the courses your team members are currently enrolled in.

[Image]

From here, you can:

- Click a course name to access the **Course-Specific Dashboard**, which provides overall course progress and status for your team.
- **Enrol or unenrol** team members in courses (pick a course and use **multi-select** to manage several members at once).
- View the number of available seats and waitlist spots.
Note: Click a **column header** to sort the list.

Awards Tab

The **Awards** tab displays all certificates and awards earned by your team members.

[Image]

From here you can:

- See all Certificates and Diplomas awarded to your team members.
- Download attached documents (if available).

Requests Tab

For courses with moderated enrolment, you can manage pending course applications in the **Requests** tab. From here, you can approve or decline requests directly. Your actions will automatically update the member's enrolment status.

[Image]

Moderated enrolment is set in the course settings in the **catalogue builder**.

[Image]

Communications to notify Managers and Team members

Admins can set up Automated Communication to keep both managers and learners (team members) informed. For example:

1. Notify managers when a team member applies for a course.
2. Notify learners when their course application is approved.

To enable notifications, create an **Automated Communication** with these triggers:

1. When a Team member has requested to take a course

Audience: Team Manager

Participant → Status → Is not Activated

and

Participant → Source → Is Course Catalog

2. When a Team manager has approved a request to take a course

Audience: Participant

Participant → Status → Is Activated

and

Participant → Source → Is Course Catalog