# Wellness Wave Surfing



# Team view 4

Jane Doe - 2025-12-08 - Comments (0) - Travel (new)

### 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