# **Wellness Wave Health**

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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**

 ${\bf Team\ View\ offers\ three\ dashboards: \bf Team\ Dashboard,\ Individual\ Member\ Dashboard,\ and\ Course-Specific\ Dashboard}$ 



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

 $Participant \rightarrow Status \rightarrow Is \ not \ Activated$ 

and

Participant → Source → Is Course Catalog

2. When a Team manager has approved a request to take a course Audience: Participant  $\rightarrow$  Status  $\rightarrow$  Is Activated and

 $Participant \rightarrow Source \rightarrow Is\ Course\ Catalog$