Team view

Ester Andersson - 2026-11-17 - Functions

What is Team View?

Team View gives managers a central overview of their team members' learning activities in Learnifier. Managers can track progress, manage course enrollments, review enrollment requests, and view certificates and awards. When enabled, Team View can also show learning activities across multiple portals within the same Learnifier environment.

What is it used for?

Use Team View to follow your team's learning progress, identify members who may need support, manage course participations and requests, and keep track of certificates and their expiration dates.

Availability

Team View is available in the **Professional** and **Enterprise** plans. You need **manager permissions** to access Team View.

Access Team View

1. Log in to Learnifier as a learner.

2. Select **Team** in the main navigation. The Team tab is shown if you have manager permissions.

3. If you manage more than one team, open the team you want to view.

Note: If the Team tab is missing, contact your Learnifier administrator to check your permissions.

Set up teams

Before managers can use Team View to follow their team members' learning activities, teams need to be set up in Learnifier.

There are two ways to create and manage teams:

- **Manual setup** – Administrators can create and manage teams manually in Learnifier.
- **Integration** – Teams can also be managed through an integration. This is particularly useful for organizations with many employees or frequently changing team structures.

Recommendation: For larger organizations, managing teams through an integration can reduce manual administration and help keep team structures up to date.

Contact Learnifier to learn more about the integration options available for your organization.

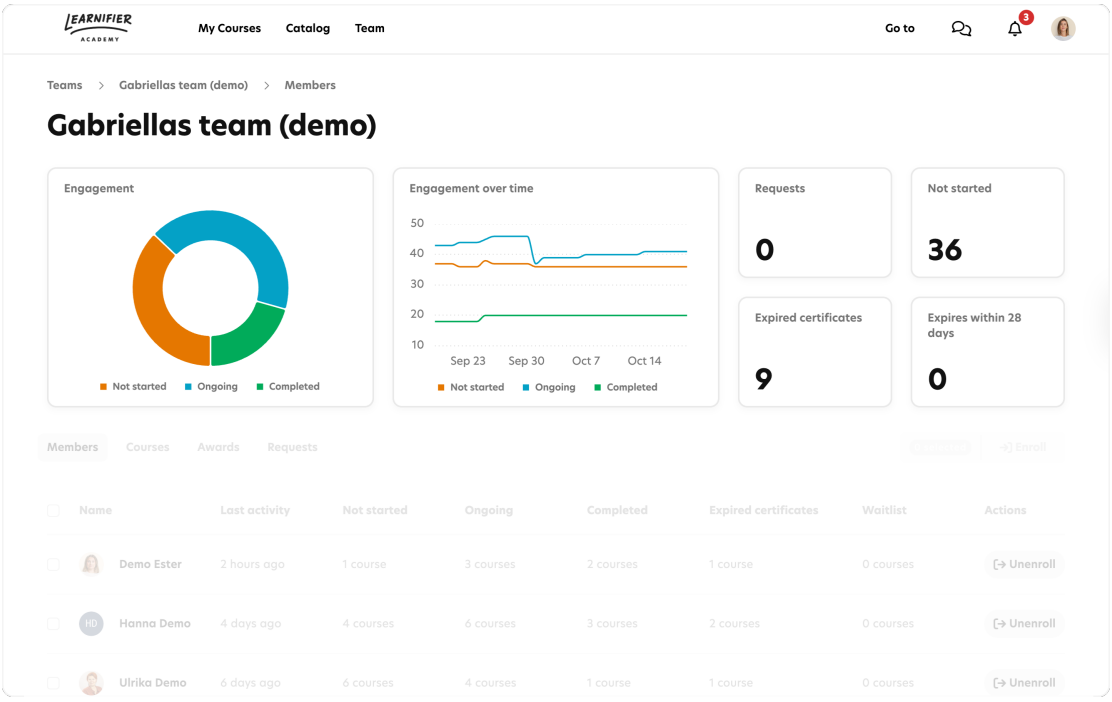
Monitor your team's learning progress

Team View includes three dashboard perspectives:

- **Team Dashboard** – an overview of learning activity across your team.
- **Individual Member Dashboard** – progress and status for a specific team member.
- **Course-Specific Dashboard** – your team's progress in a specific course.

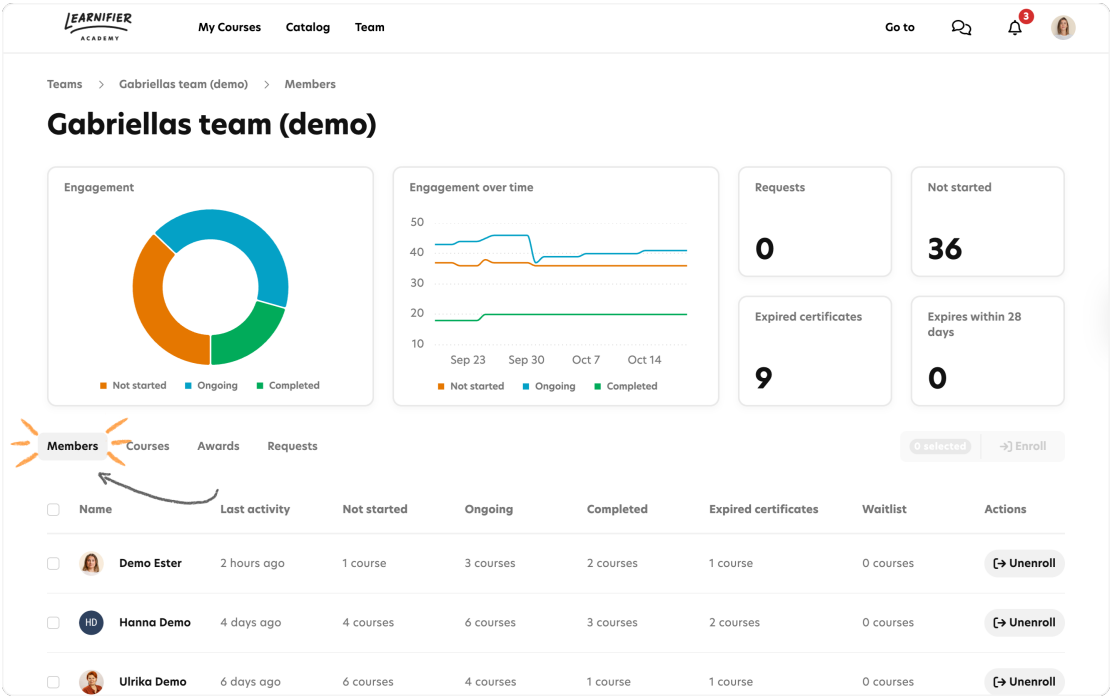
Each dashboard includes the following indicators:

- **Engagement** – a pie chart showing participation status.
- **Engagement over time** – a line chart showing how participation changes over time.
- **Requests** – the number of pending enrollment requests. Select to view and manage requests.
- **Not started** – enrollments that team members have not started. Select to view a detailed list.
- **Expired certificates** – certificates that have expired. Select to view a detailed list.
- **Certificates expiring within 28 days** – upcoming certificate expirations. Select to view a detailed list.



View and manage team members

The **Members** tab lists your team members and shows their learning progress. It also gives you access to the Team Dashboard.



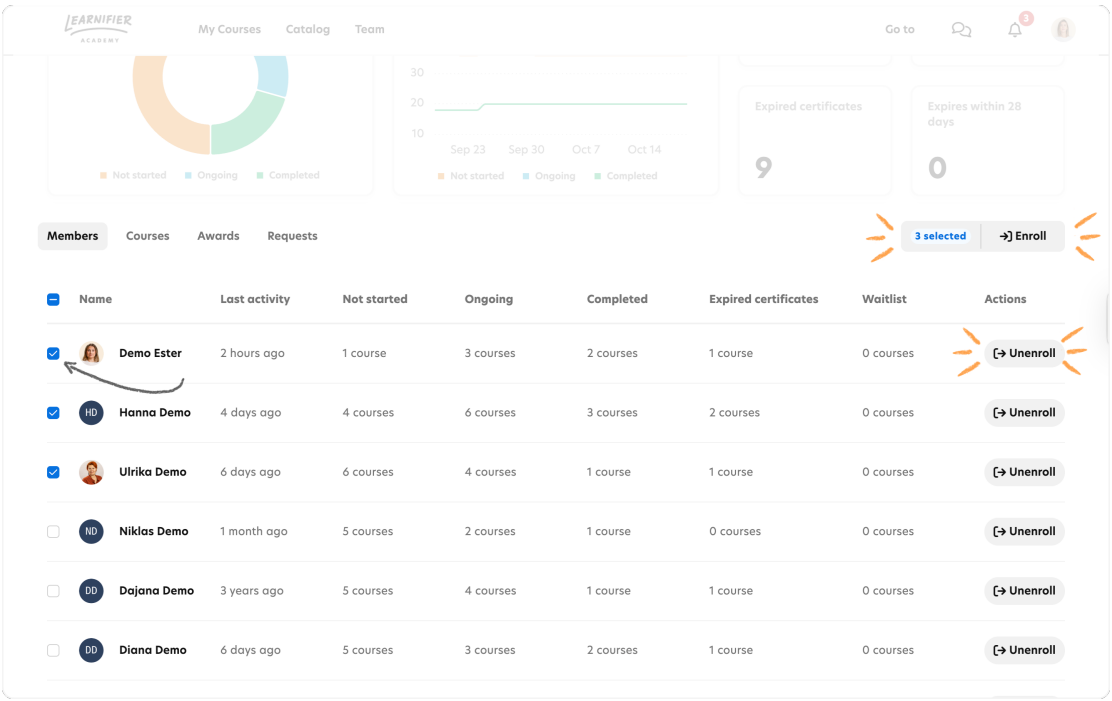
Manage enrollments for multiple members

1. Open the **Members** tab.

2. Select one or more team members.

3. Choose the relevant action to enroll or unenroll members, or add them to a course waitlist.

4. Select the relevant course and complete the action.



Use **Filter** to find specific courses.

View an individual team member

1. Open **Members**.

2. Select a member's name.

3. Review the **Individual Member Dashboard** and the member's detailed course progress and status.

You can also enroll or unenroll the member, or add them to a course waitlist, where these actions are available.

View and manage team courses

Open the **Courses** tab to view courses that members of your team are currently enrolled in.

From here, you can:

- Select a course name to open the **Course-Specific Dashboard** and review your team's progress in that course.
- Enroll or unenroll several team members in a course by selecting the course and using multi-select.
- View the number of available course seats and waitlist places.

Select a **column header** to sort the course list.

Review course participations

Open the **Participations** tab for an overview of your team members' course participations across all courses they have been enrolled in.

Use this view to review participations across members and courses in one place.

View certificates and awards

Open the **Awards** tab to see certificates and diplomas awarded to your team members.

From here, you can:

- Review certificates and diplomas earned by team members.
- Download attached documents when available.

To identify certificates that have expired or will expire within 28 days, use the relevant indicators in Team View.

Approve or decline course requests

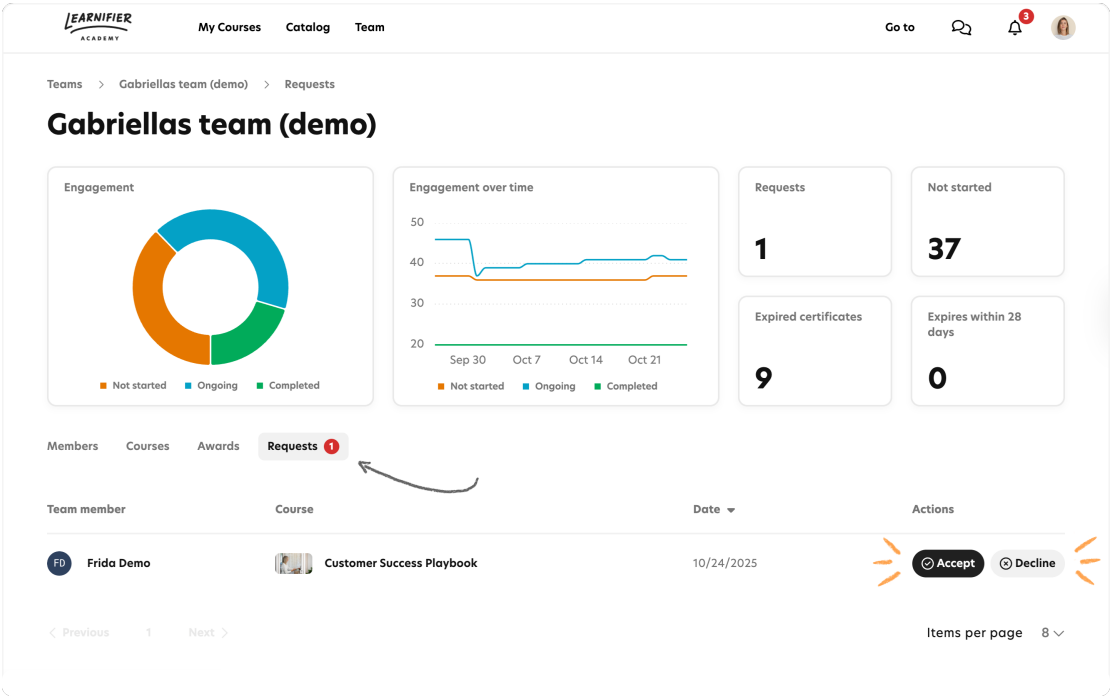
If a course uses moderated enrollment, you can manage pending course applications in the **Requests** tab.

1. Open **Requests**.

2. Find the pending application you want to review.

3. Select **Approve** or **Decline**.

The action automatically updates the team member's enrollment status.



Note: Moderated enrollment is configured in the course settings in the **Catalog Builder**.

View learning activities across portals

If your organization uses separate portals for different companies, departments, or training areas, Team View can provide a consolidated overview of your team members' learning activities across those portals within the same Learnifier environment.

This can help managers:

- See which team members have ongoing or completed courses.
- Identify members who may need support or a reminder.
- Review certificates and awards from the included portals.
- Follow the team's learning activities from one place.

By default, Team View only shows information from the current portal.

To enable visibility across portals, your Learnifier administrator can contact Learnifier for assistance. Visibility can be enabled for all or selected portals.

Important: Visibility across portals does not automatically give managers permission to enroll, unenroll, or otherwise administer courses in those portals.

Good to know

Why can't I see the Team tab?

Team View requires manager permissions. Contact your Learnifier administrator if the Team tab is missing.

How are teams created and maintained?

Teams can be created and managed manually by administrators or through an integration. Integrations can be particularly useful for larger organizations because they can reduce manual maintenance and help keep team structures updated.

Contact Learnifier for more information about integration options.

Can Team View display courses from other portals?

Yes, when cross-portal visibility has been enabled for the relevant portals within the same Learnifier environment.

By default, only information from the current portal is shown. Your administrator can contact Learnifier to request activation for all or selected portals.

Can I manage courses in another portal if I can see them?

Not automatically. Viewing learning activities across portals and having permission to administer courses are separate things.

How can managers and team members receive notifications?

Administrators can configure **Automated Communication** to notify managers and learners about course enrollment requests and approvals.

For example:

- Notify a manager when a team member requests to enroll in a course.
- Notify a learner when their course application has been approved.

Notify a manager when a team member requests a course

Audience: Team Manager

Conditions:

- Participant → Status → Is not Activated
- Participant → Source → Is Course Catalog

Notify a learner when a course request is approved

Audience: Participant

Conditions:

- Participant → Status → Is Activated
- Participant → Source → Is Course Catalog

Note: Verify that these conditions match the intended enrollment events before activating the communication.

For more information, see Automated communication.