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Team view

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With **Team View**, managers can easily support their team's learning journey. They can enroll or unenroll members from courses, track progress, manage requests, and gain insights into learning trends, all in one place.

Available from: Professional

Accessing Team View

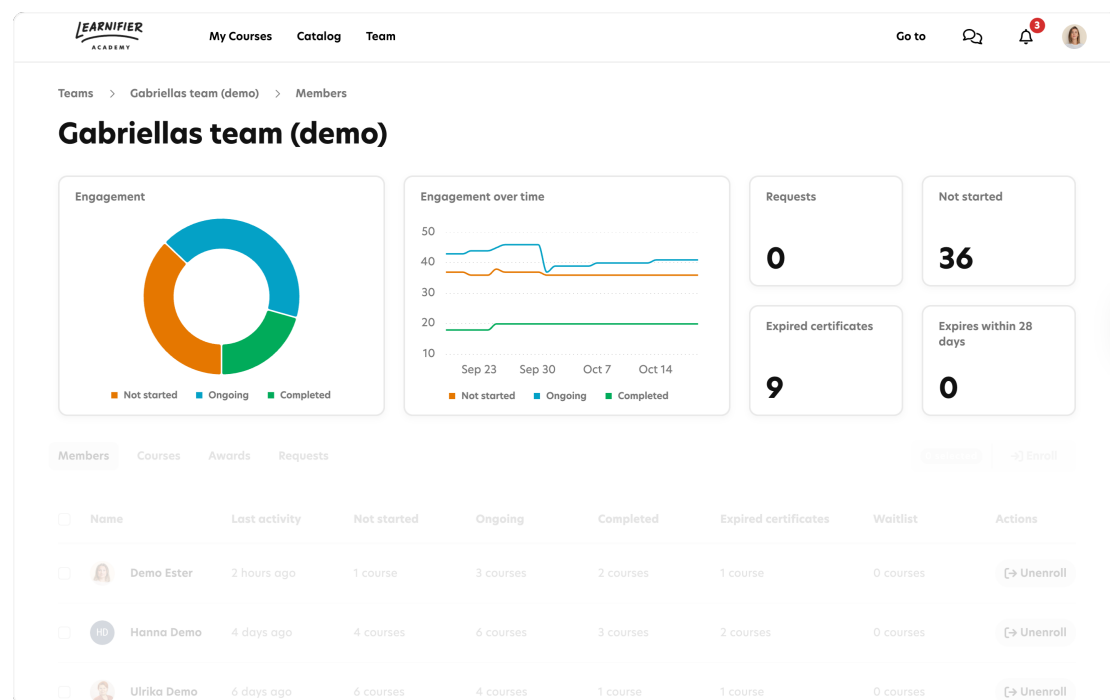
To access Team View, log in as a Learner.

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**

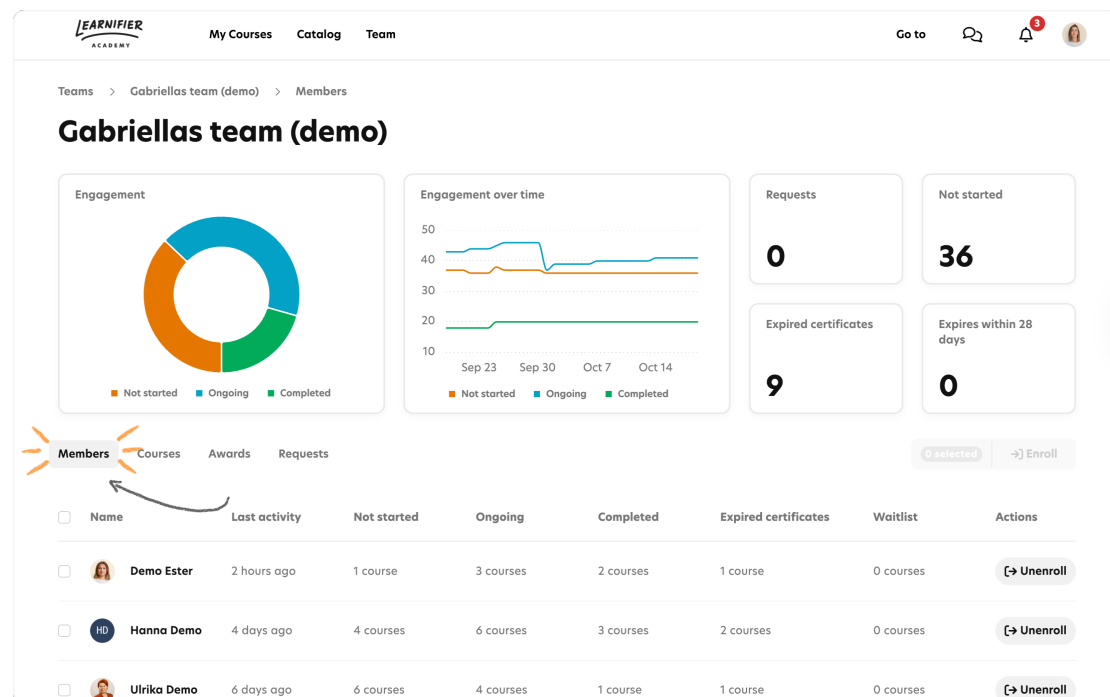


Each dashboard includes:

- **Engagement** (pie chart) - visualizes the current overall participation status.
- **Engagement over time** (line graph) - tracks changes in participation over time.
- **Requests** - number of pending enrollment requests. Click to view and manage.
- **Not started** - shows enrollments 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.

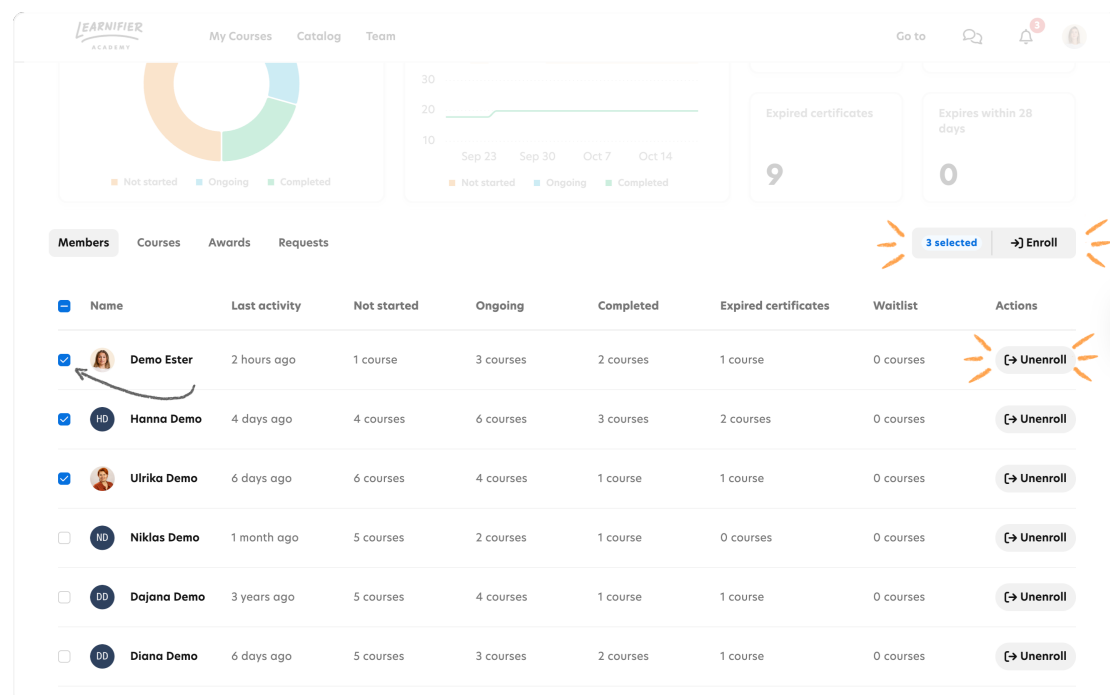
Members Tab

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

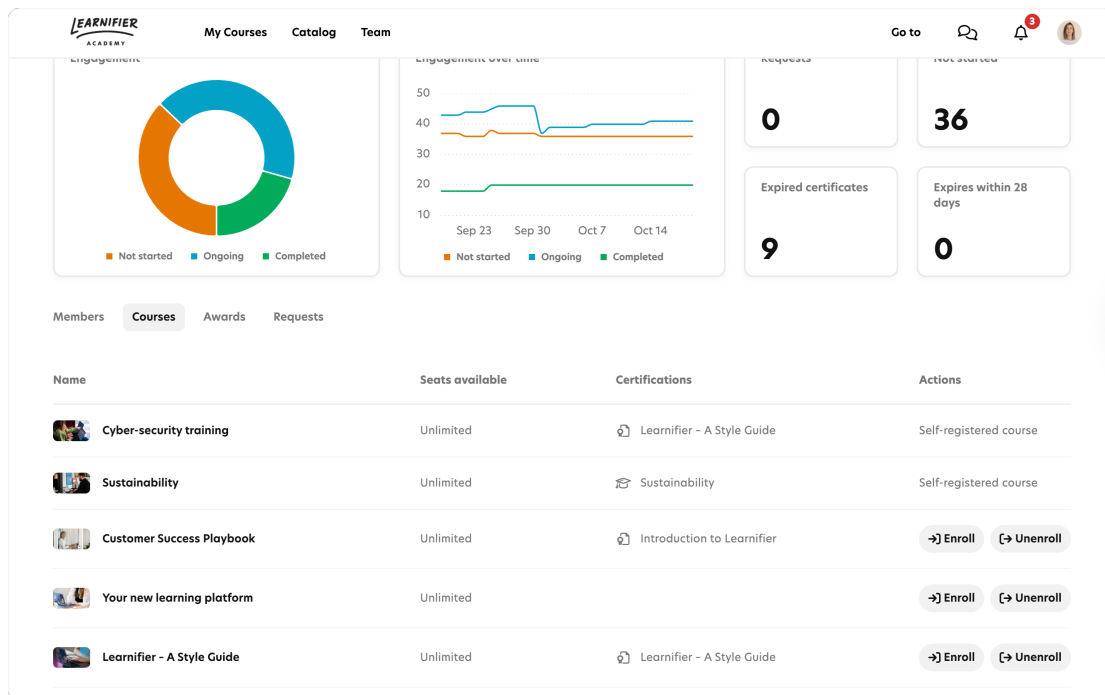


From the member overview, you can quickly **enroll**, **unenroll**, or **add members to a waitlist** for specific courses.

Select one or more members to perform an action.



Use **Filter** to find specific courses



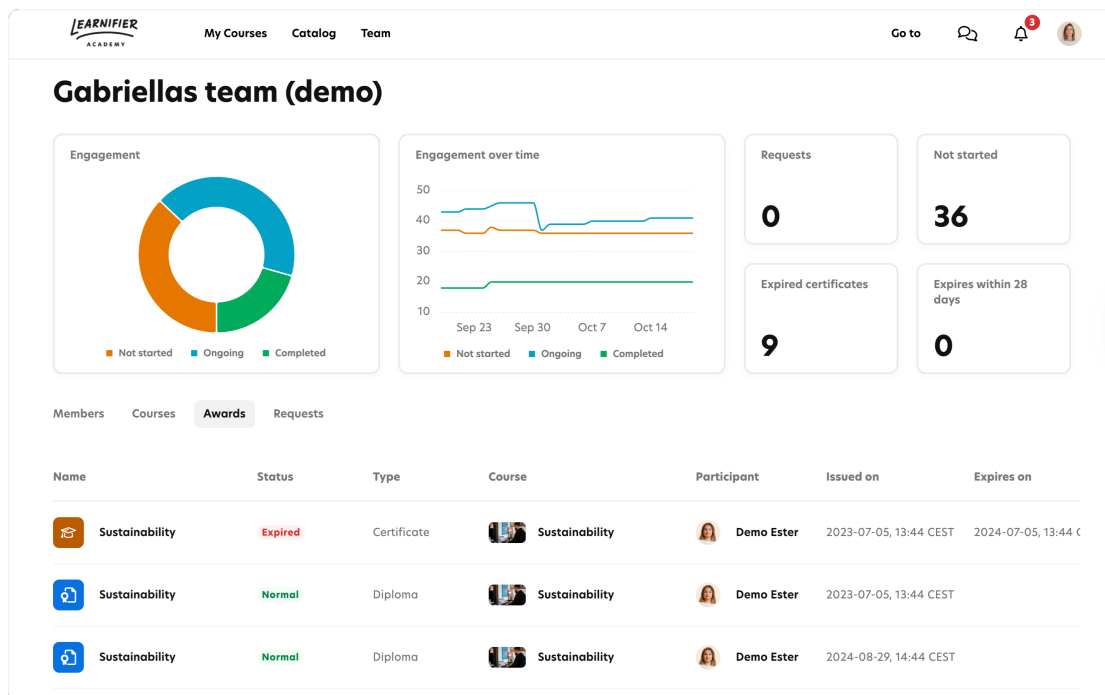
From here, you can:

- click a course name to access and view the **Course-Specific Dashboard**, providing overall course progress and status in your team.
- **enroll or unenroll** 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.



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 enrollment, 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 enrollment status.

The screenshot shows the 'Requests' tab for the 'Gabriellas team (demo)'. The top navigation bar includes 'My Courses', 'Catalog', and 'Team'. The main header shows 'Teams > Gabriellas team (demo) > Requests'. Below the header, there are four summary cards: 'Requests' (1), 'Not started' (37), 'Expired certificates' (9), and 'Expires within 28 days' (0). To the left of these cards are two charts: 'Engagement' (a donut chart with segments for 'Not started', 'Ongoing', and 'Completed') and 'Engagement over time' (a line chart showing engagement levels from Sep 30 to Oct 21). Below the charts, there are tabs for 'Members', 'Courses', 'Awards', and 'Requests' (which is active and has a red notification badge). The 'Requests' tab shows a table with columns: 'Team member', 'Course', 'Date', and 'Actions'. The first row shows 'Frida Demo' for the 'Customer Success Playbook' course, dated '10/24/2025'. The 'Actions' column for this row has 'Accept' and 'Decline' buttons. A curved arrow points from the 'Requests' tab to the table. At the bottom right, there is a 'Items per page' dropdown set to '8'.

Moderated enrollment is set in the course settings in the **catalog builder**.

The screenshot shows the 'Customer Success Playbook' course settings in the 'Enrollment dates' tab. The left sidebar has tabs for 'Visibility', 'Categories', 'Enrollment dates' (which is active), and 'Audience'. The main content area is titled 'Enrollment dates' and includes the instruction 'Adjust if and how learners should enroll and/or unenroll from this project.' Below this, there is a toggle for 'Enrollment' which is turned on. Under the 'Enrollment' section, there are two radio buttons: 'Direct' (which is unselected) and 'Moderated' (which is selected). The 'Moderated' option has a description: 'Learners can apply to be enrolled to this course. An administrator needs to approve the enrollment.' Below the radio buttons, there are two date pickers for 'Start date' and 'End date'. Below these, there is a checkbox for 'Allow Learner to cancel enrollment request before it is approved' which is currently unchecked. At the bottom of the settings panel, there is a 'Unenrollment' section with a toggle that is currently disabled. At the bottom right of the entire settings window, there are 'Cancel' and 'Save' buttons, and a blue circular button with three dots.

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