



This quick reference guide (QRG) explains how to locate your team and run reports. This guide is for Member and Volunteer teams only.

## 1 What are Teams?

The team structure is one of the most important steps in a successful learning platform. Users can be part of as many teams as needed. You can be a user in one team and a Team Leader/Admin in another team. To view Teams you belong to, click on the Teams tab.

Teams are used to organise learners, assign learning and streamline reporting



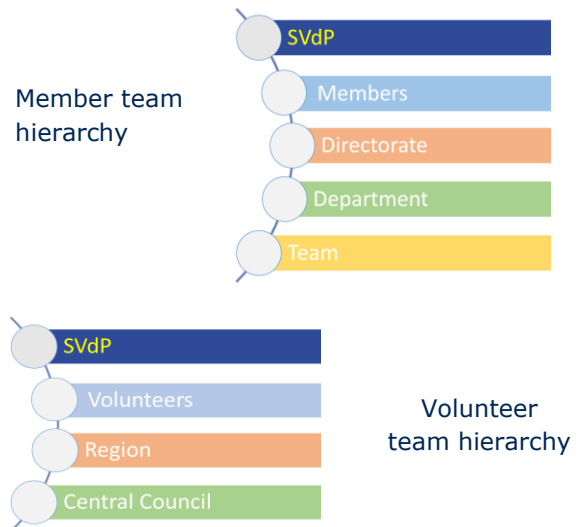
You must be a Team Leader or Team Admin of the Team to run reports. Contact [Learning@vinnies.org.au](mailto:Learning@vinnies.org.au) if you do not have the permissions and require this access level.

## 2 Team Hierarchies

There can be several independent hierarchies and learners can be included in all of them - the more teams there are, the more reporting options around these teams are available.

**Parent Team:** This team encompasses the entire St Vincent de Paul Society NSW. This allows for easier reporting, on the whole organisation - In this instance is the Parent Team is SVdp.

**Hierarchy:** The parent team can have an unlimited number of teams and sub teams under it. These “trees” of teams are known as Team Hierarchies.



When you are assigned as a Team Leader/Admin you will be able to see your Team and any sub-teams that belong to it.



### 3 Viewing Teams

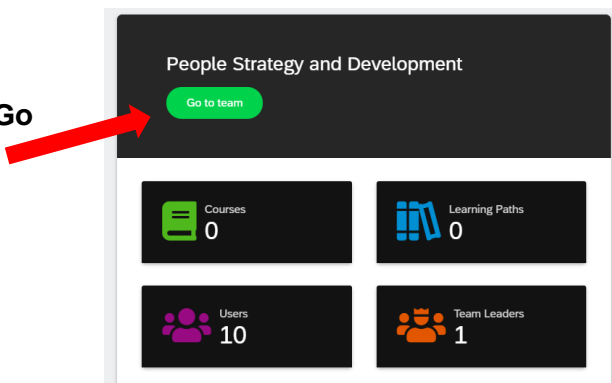
There are three ways to view Teams.

- Team view – Provides an alphabetical list of teams. To find a team scroll or use the search function if you know the Team name.
- Chart view – Is a graphical representation of the teams in a hierarchy. You can click on a Team from this view.
- Tree view – Presents team in an outline form with the ability to drill down from team to sub-team by clicking on the arrow next to the sub-team name then click on the Team name.



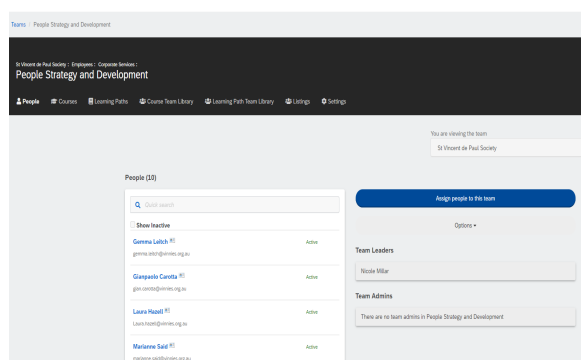
### 4 Viewing Team Information

Tree view will take you to a metrics page which provides a quick overview of the team. Select **Go to Team** to view more team information.



To view more detailed information, using Teams or Chart view select the **Team Name** from the Teams or Chart view.

This page opens on the People Tab where you can view/search for people in the Team. The next step contains more details.





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The screenshot shows the 'Teams' page for 'People Strategy and Development'. At the top, there are navigation tabs: 'People', 'Courses', 'Learning Paths', 'Course Team Library', 'Learning Path Team Library', 'Listings', and 'Settings'. Below the tabs, the page title is 'People Strategy and Development'. A search bar and a 'Show Inactive' checkbox are present above a list of team members. The list includes Gemma Leitch, Gianpaolo Carotta, Laura Hazell, and Marianne Said, all marked as 'Active'. On the right side, there is a section for 'Team Leaders' (Nicole Millar) and 'Team Admins' (None).

From these tab selections you can view courses and learning paths that have been assigned to the Team requiring completion, also a Course and Learning Path Library containing available Learning for the Team

List of people in the Team. Click on a name to view their recent activity, achievements and progress/completion of assigned courses and learning paths

These are the Team Leaders and Team Admin

*\*To protect the privacy of our Members and Volunteers Screen shots used in this document containing names have come from our Administration view.*