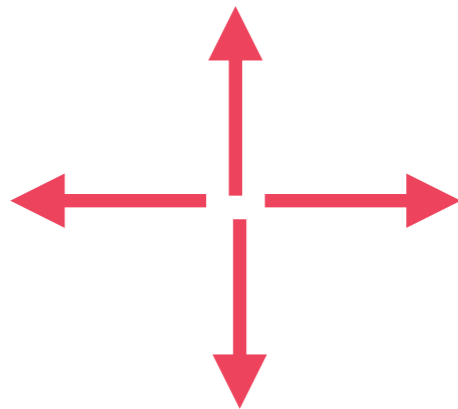# Team Administrator Training Manual

swivl

How to read this guide

Indicates where you need to be (which page, section, or tab) in order to follow the instructions indicated by arrows

Indicates where there are steps you need to take to complete the desired action. If any arrows have a number next to them, they are meant to be followed in consecutive order: 1, 2, 3...

Background information or best practices for using your Administrator portal or designing settings for your team
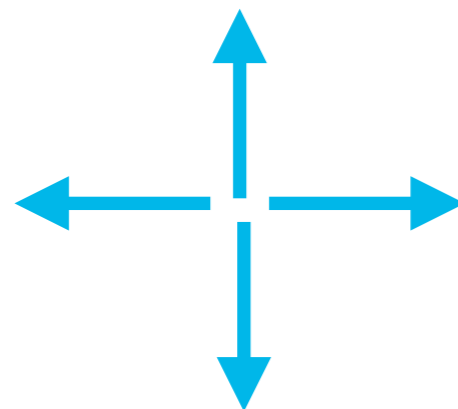
Used to identify where on the page, section, or tab to which the background information or advice pertains

Slides	Contents
4-9	How to access the Administrator portal & user side
10-12	Team Dashboard: Overview and Statistics
13-18	Settings and Security Preferences
19-27	Team Members: add, remove, lock, change account type
28-29	Team Groups: add, edit, and change member access
30-31	Team Videos and Reporting
32-33	Help Center and Important Contacts

Activating your Administrator Account

After your Team Subscription is activated, inform your Sales Representative at Swivl which email address you have been using to access Swivl, so a Pro Team code can be emailed to you.

If you do not yet have a Swivl Team email address, register for one: cloud.swivl.com/register.

Register a ***free*** Swivl account if this is the first time you're using Swivl.

Activating your Pro Team Code

When you receive your email containing your Team Pro Code, visit cloud.swivl.com/upgrade (sign in first, if you are not already).

Do not use this code; enter the unique code provided to you in this space

Accepting the User Agreement
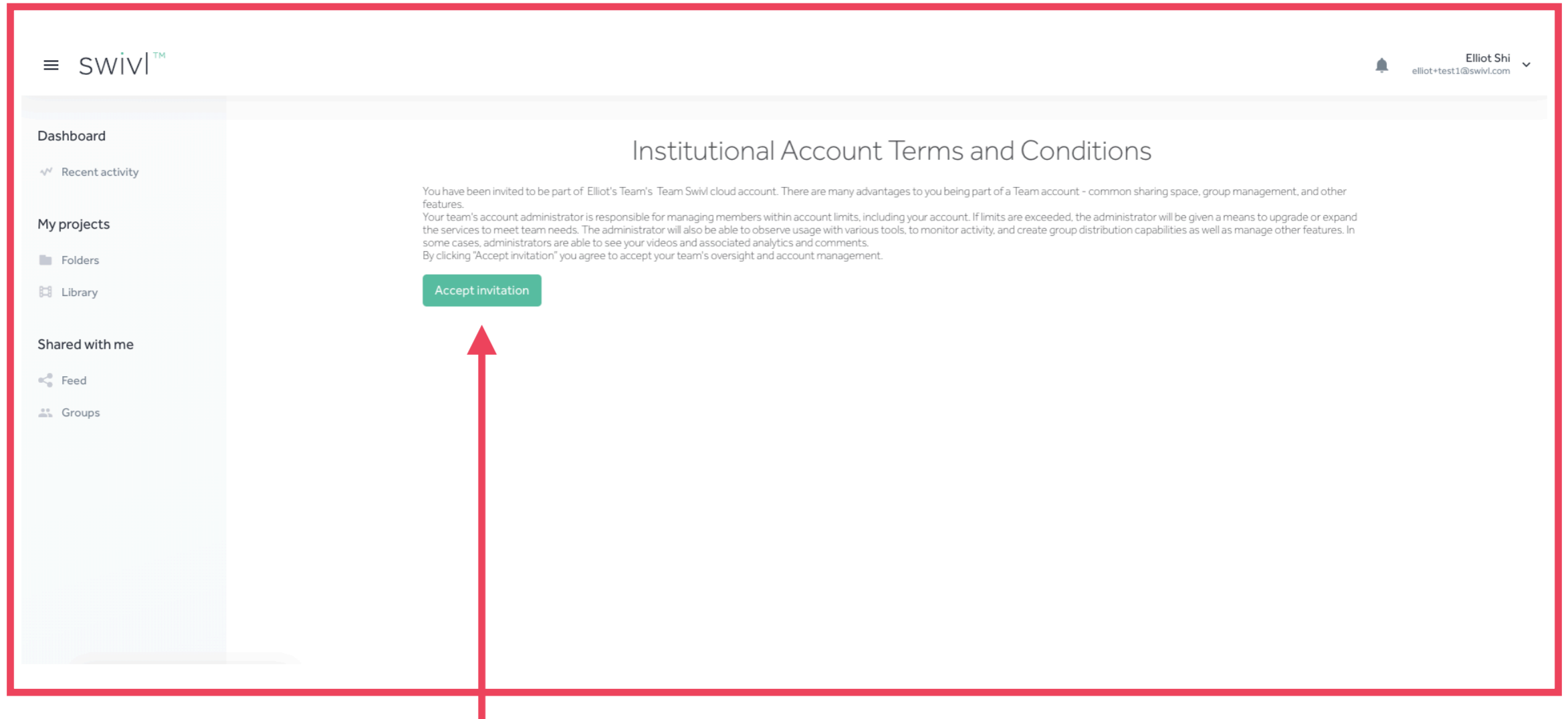
Read the Account Terms and Conditions and Accept your Invitation.

Accessing the Administrator Portal

Once you log into your Swivl Team account, you will automatically be in your Administrator Portal.

Accessing the User Side

To access the user side of your account, click on your name and email in the upper right corner and then click on "Switch to User."
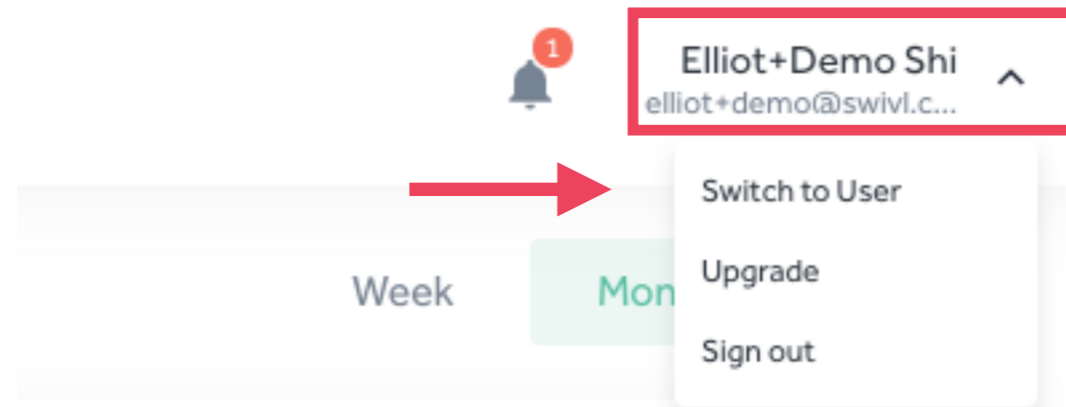
Alternatively, click the "Team" button in the bottom left corner
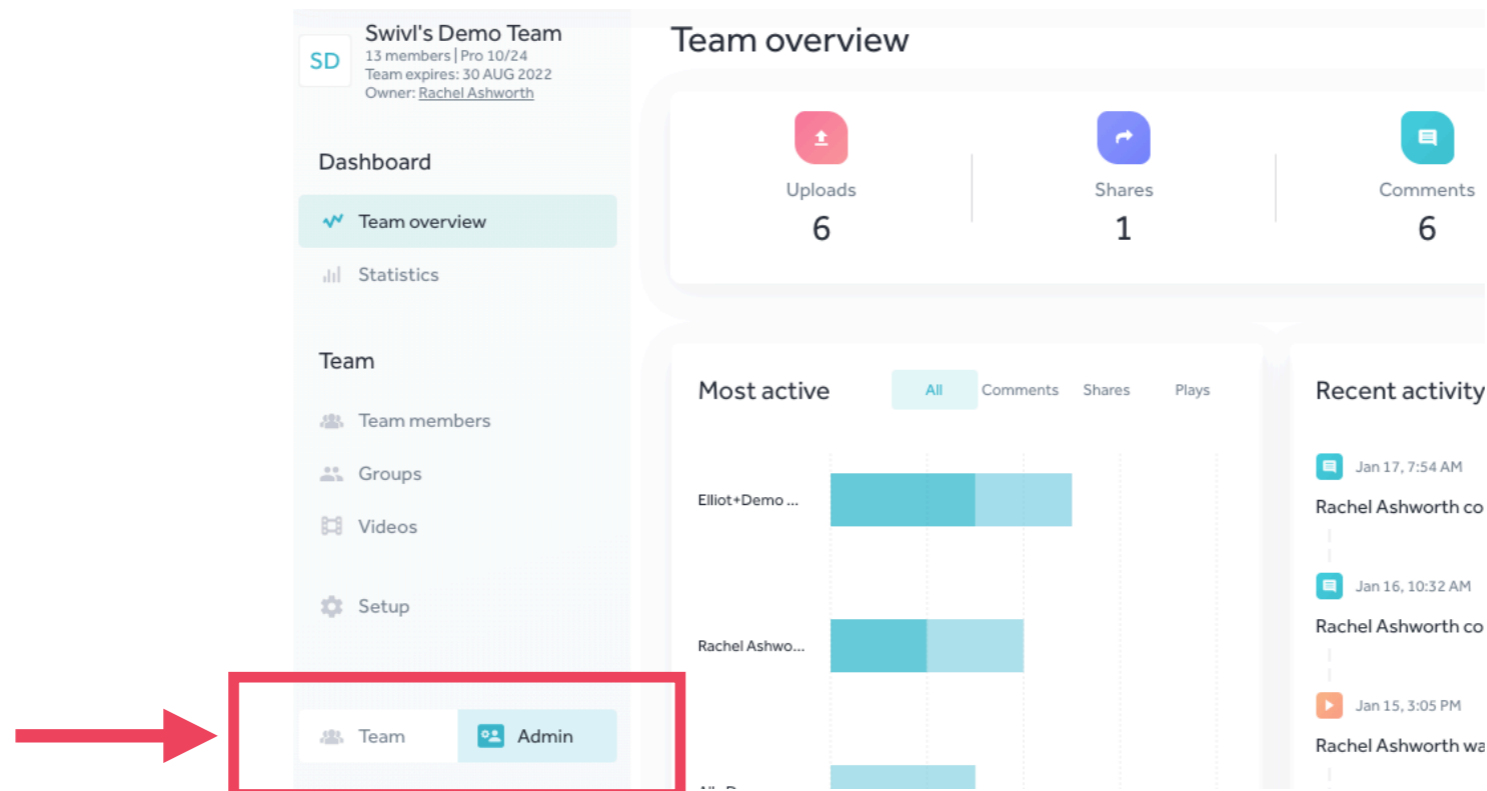
Team Subscription and Composition

Under your Team Name, find your subscription expiration and how many members you have at each service level, according to the number of users your account has been allotted.

Dashboard - Overview

Filter view by week, month, or year

View most active and recent activity by comments, shares, and views

Dashboard - Overview (continued)

Scroll down to the bottom of the Overview page to identify the types of projects your team members produce most and whether or not they are using a Swivl robot.

Project type

- 79% Single video
- 9% Multi-marker
- 6% Screencast
- 4% Slides
- 2% Multi-camera

Robot usage

- 69% No robot
- 31% C Series robot
- 0% Gen 2 robot (old)
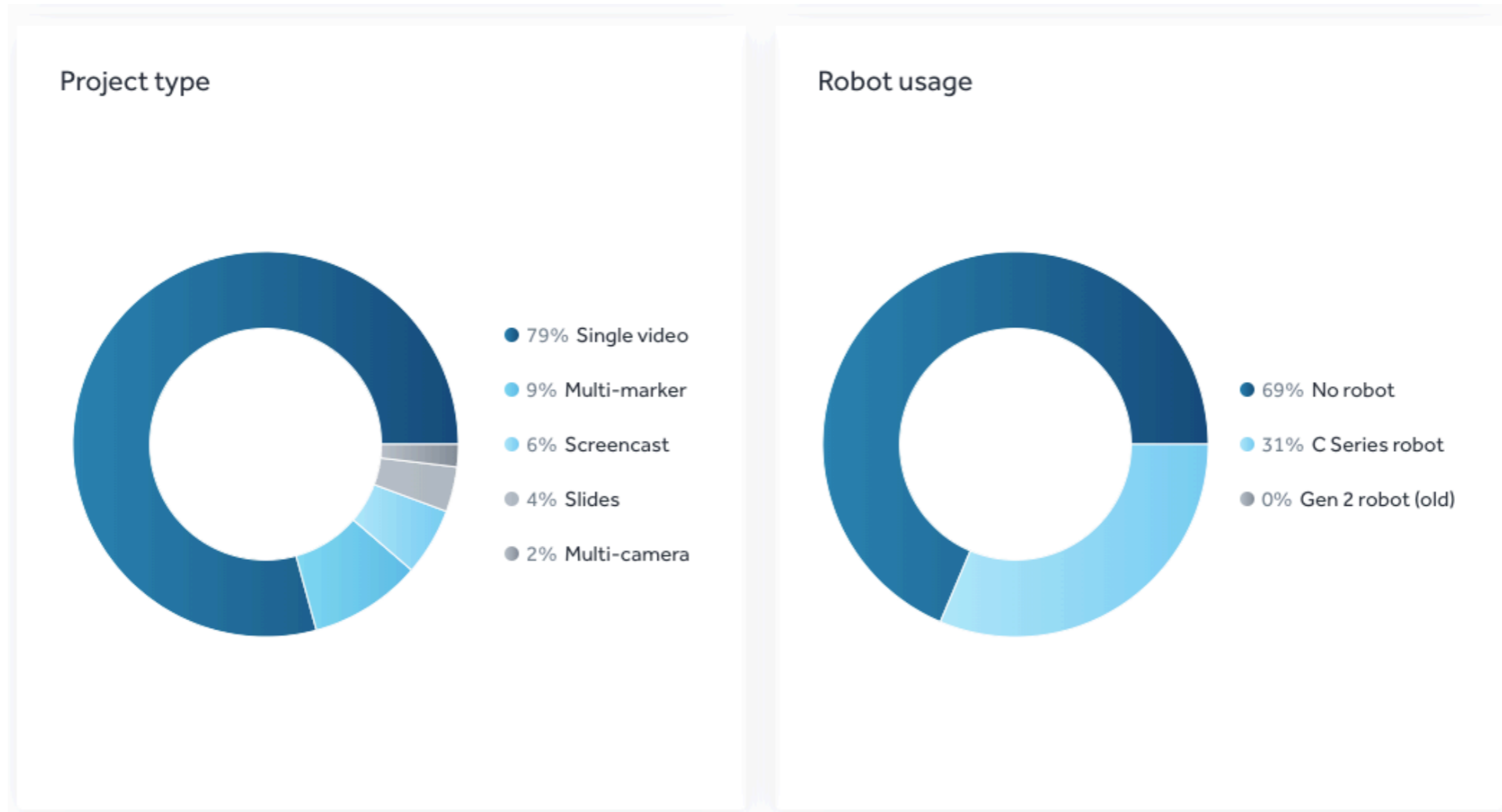
*If you notice a sudden drop in robot usage this month, perhaps your team members are experiencing technical issues? Contact support@swivl.com immediately!

Dashboard - Statistics

Access deeper analytics sorted by Team Member, Group, and User Label.

Name	Videos Uploaded	Videos Shared	Videos Played	Comments Made	Last Active
Rachel Ashworth	1	0	7	7	17 Jan, 2020
Okharchenko+Demo K	25	12	0	2	08 Jan, 2020
Amanda+Demo Regan	7	5	5	31	05 Nov, 2019
Alla Demo	5	0	3	0	30 Dec, 2019
Elliot+Demo Shi	11	9	3	13	09 Jan, 2020
Mbilorosiuk+Demo Bilorosiuk	0	0	0	0	
Amanda+Demo1 Regan	2	1	0	0	14 Oct, 2019
Rachel+Demo1 Swivl	0	0	0	0	
Reggie Deyo	0	0	0	0	
Camille Smith	0	0	0	0	

Setup / Security

We recommend starting with Security if this is your first time setting up Swivl. Go to the Team - Setup/ Security section to define the privacy and sharing preferences for yourself and your team.

Define your security preferences for accessing team content

Define the sharing preferences for your team members

Setup - User Labels

User labels are optional but will help you identify and sort team members in your team table quickly and easily.

*User Labels are not shared with your users. They are for Administrator view only.

Setup - Rubrics

Incorporate your own templates, frameworks, or "look-fors" as Rubrics for time-stamped commenting.

Setup - Rubrics (cont.)

Click add new rubric; give your Rubric a title and type in each section from your form as individual Standards. Ask your CS team if you need help organizing your specific framework into our Rubric system.

Rubrics/User View

This is what your team members will see when they leave time-stamped comments

Setup - Tags

Create your own video "hashtags" or your users can populate this tag library when they provide a title and summary for their video. You may delete any tags, which will remove tags from any associated videos.

Press this button to add a new user label!

We recommend using video tags to encourage organization; assembling best practice libraries is a simple task when you can filter videos out of your feed by searching for specific tags.

Team - Team Members

The Team Members table is interactive! Click on each user to learn more about them.

Team - Team Members / Add New Members
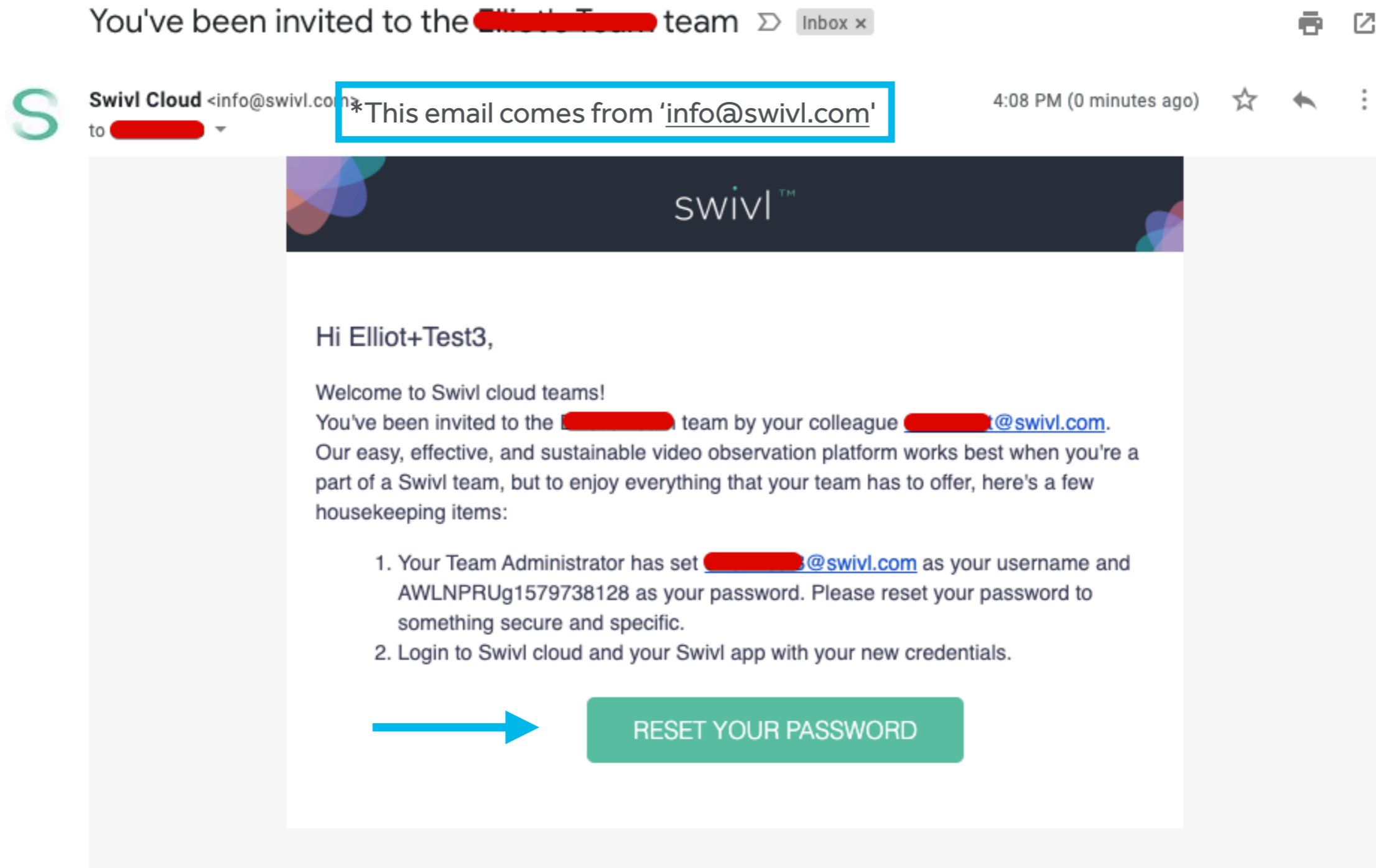
Email invitation for NEW Users of Swivl

This is the email your team members will receive if they **do not** already have a Swivl account. They must first reset their password before proceeding to accept the invite.

You've been invited to the ~~Elliots Team~~ team ⟩ Inbox ✕   🖶 ⤢

S   **Swivl Cloud** <info@swivl.com>   *This email comes from 'info@swivl.com'   4:08 PM (0 minutes ago)   ☆   ↩   ⋮
    to ~~━━━~~ ▾

swivl ™

Hi Elliot+Test3,

Welcome to Swivl cloud teams!
You've been invited to the ~~━━━~~ team by your colleague ~~━━~~t@swivl.com.
Our easy, effective, and sustainable video observation platform works best when you're a part of a Swivl team, but to enjoy everything that your team has to offer, here's a few housekeeping items:

1. Your Team Administrator has set ~~━━━~~@swivl.com as your username and AWLNPRUg1579738128 as your password. Please reset your password to something secure and specific.
2. Login to Swivl cloud and your Swivl app with your new credentials.

RESET YOUR PASSWORD

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Email invitation for EXISTING Users of Swivl

This is the email your team members will receive if they **do** already have a Swivl account. They must accept the terms and conditions to accept the invite.

User View: Accepting the Team Invitation

No matter if your team member is brand new to Swivl or they already had an account, they MUST accept this agreement to join your team. If they bypass this step, they will not complete the process to join your team.

Team - Team Members / Assigning User Labels

To assign user labels, check the boxes next to the users' names and click "Labels" to reveal a dropdown menu of user labels that you created earlier. Select the appropriate user label(s) and press "Apply."

Team - Team Members / Change Account Type

Pro licenses are transferrable within your team for the entire duration of your subscription. To upgrade or downgrade a user's access, check the boxes next to the users' names, click on "Account type," and select the desired account type.

Team - Team Members / Lock & Unlock

When users leave your organization and you need to keep their videos but **do not** wish for them to gain access to their account, you should Lock the user. You can Unlock the user at any time.

Team - Team Members / Remove

When users leave your organization and you no longer need access to their content, simply Exclude the user. The user will still be able to access their Swivl Team account after being removed from your Team.

Team - Groups / Add new Group

Groups are private sharing folders among any number of individuals. Pro users can share videos to the group, Standard users can view and comment on those videos.

Team - Groups / Change Member Access

Team - Videos

As long as you have enabled view access in your Security tab of the Setup menu, you will be able to watch all of the videos your team members upload. Search by name or user and filter by type, date, or tag.
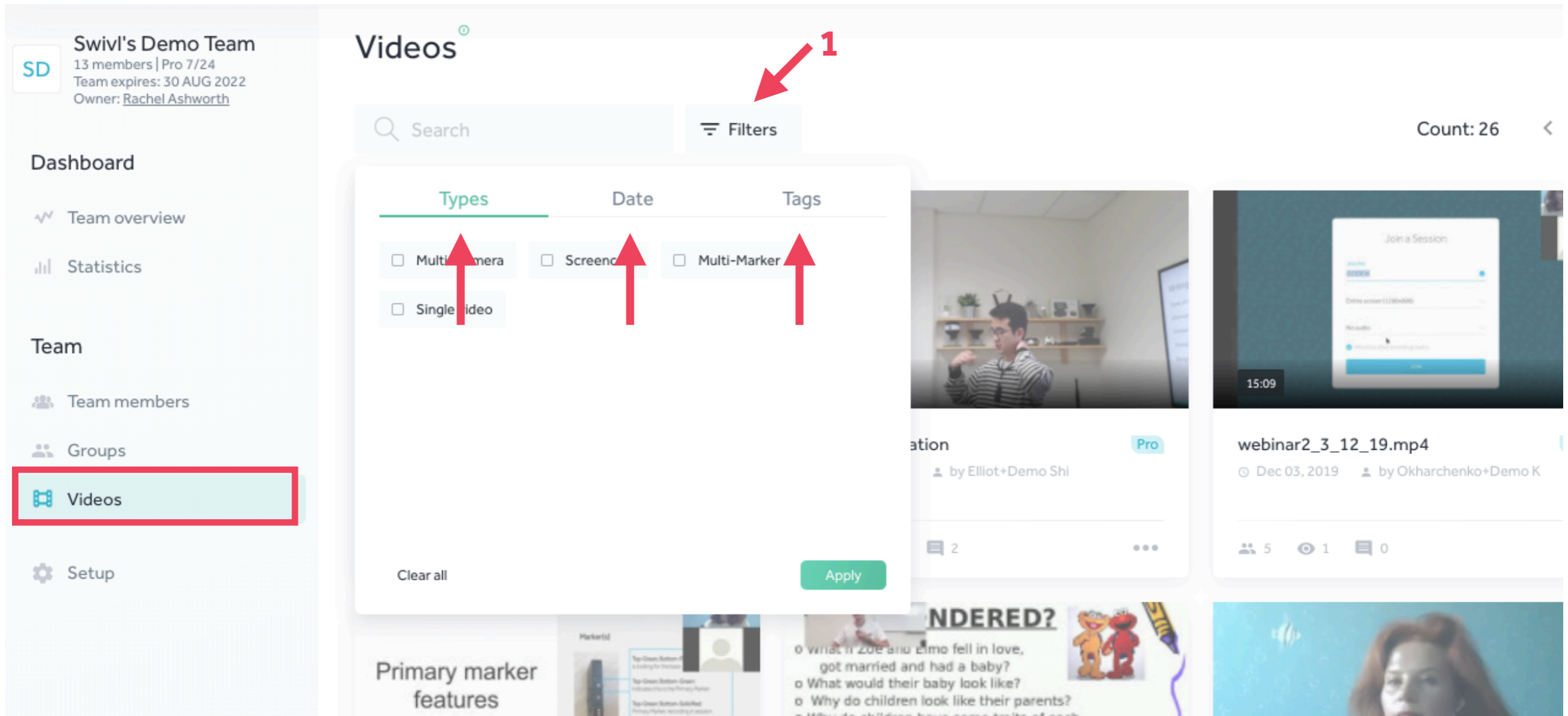
Team - Videos / Reporting

Click on the three dots at the corner of any video in your videos menu to either share it to a Group on your team or access the analytics report. Analytics include: video owner, title, summary, viewers, student vs. teacher talk time, comments, rubrics, and shares.

Help Center

Click the HELP icon at the bottom right hand corner at any time to search for articles or video tutorials for using Swivl. If you still need assistance, click on 'Contact us' to submit a support ticket.

Important Contacts

Articles/Videos: <u>swivl.com/setup</u>
Email Support: <u>support@swivl.com</u>
Call Support: 1-888-837-6209
Hours: 7:00am-4:00pm PDT, Monday-Friday
@Swivl

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