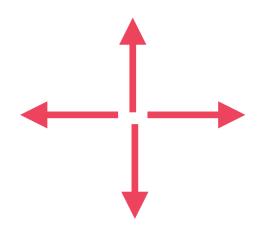
Team Administrator Training Manual



How to read this guide



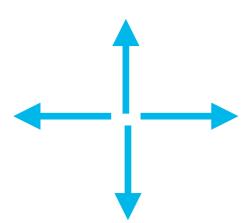
Indicates where you need to be (which page, section, or tab) in order to follow the instructions indicated by arrows



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

•••	S Sig	gn up - Swivl	×	+					
$\leftrightarrow \rightarrow$	G	cloud.swivl.com/registe	er/		0 7	☆	≡J	⊜	Incognito (2)
SW	/i∨l⊺	м				Alrea	dy have	e an acc	count? Sign in

Image: Name Image: Surname Image: Surname

rivacy - Terms

Create a new Swivl Teams account

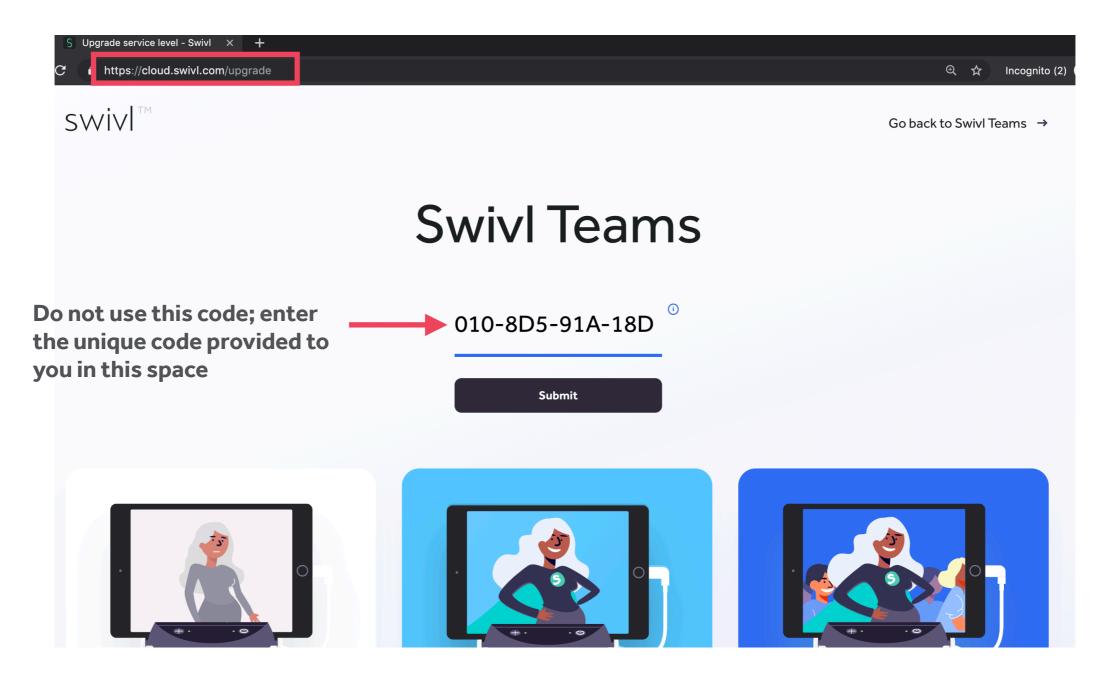
After your Team Subscription is activated, inform your Sales Representative at Swivl which email address you have been using to access Swivl, so a Pro Team code can be emailed to you.

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 <u>cloud.swivl.com/upgrade</u> (sign in first, if you are not already).



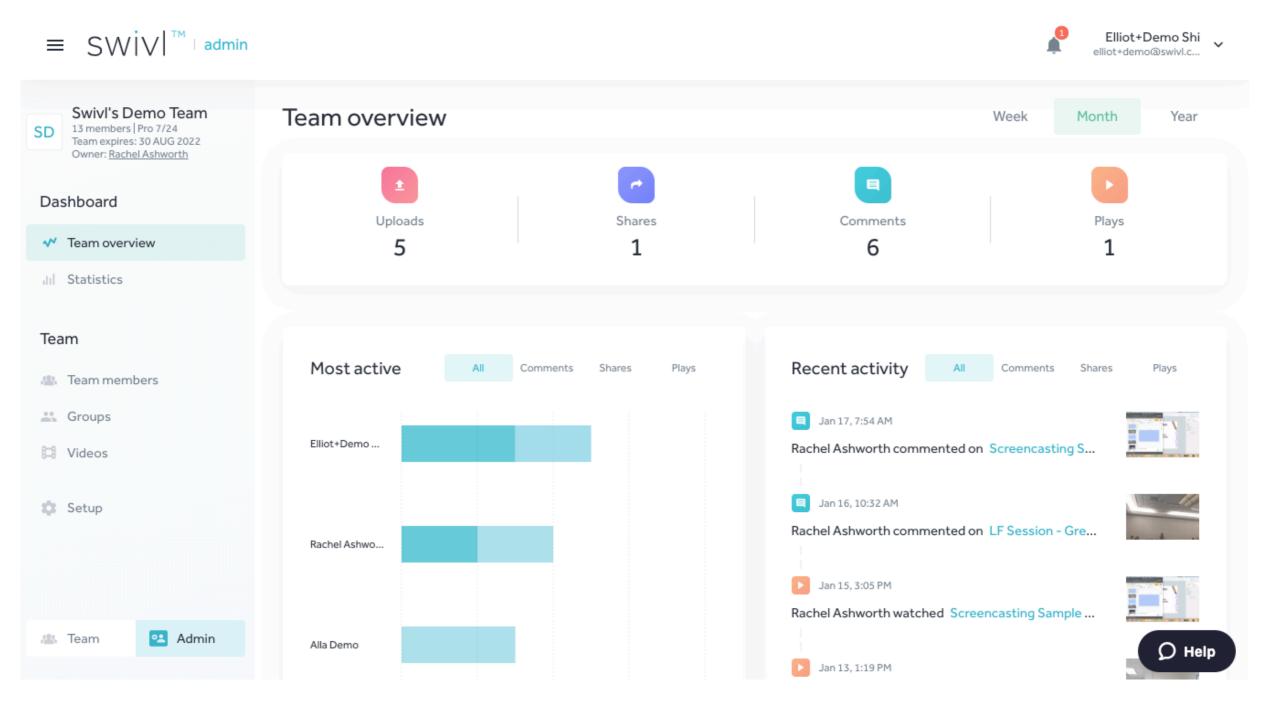
Accepting the User Agreement

≡ SWIV ™	■ Elliot Shi elliot+test1@swivl.com
My projects Folders Folders Folders Folders Folders Folders Folders Folders Folders Folders Folders	Institutional Account Terms and Conditions e been invited to be part of Elliot's Team's Team Swid cloud account. There are many advantages to you being part of a Team account - common sharing space, group management, and other s. am's account administrator is responsible for managing members within account limits, including your account. If limits are exceeded, the administrator will be given a means to upgrade or expand ices to meet team needs. The administrator will also be able to observe usage with various tools, to monitor activity, and create group distribution capabilities as well as manage other features. In ages, administrators are able to see your videos and associated analytics and comments. Ing "Accept invitation" you agree to accept your team's oversight and account management.
Shared with me	

Read the Account Terms and Conditions and Accept your Invitation.

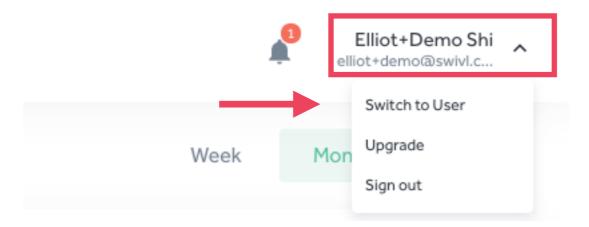
Accessing the Administrator Portal

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

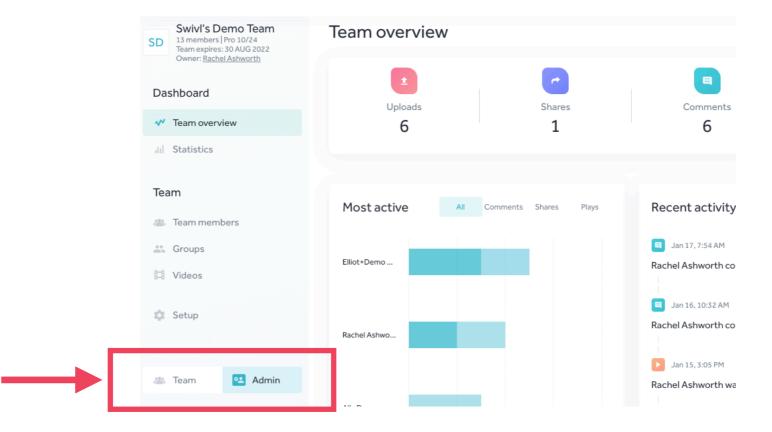


Accessing the User Side

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

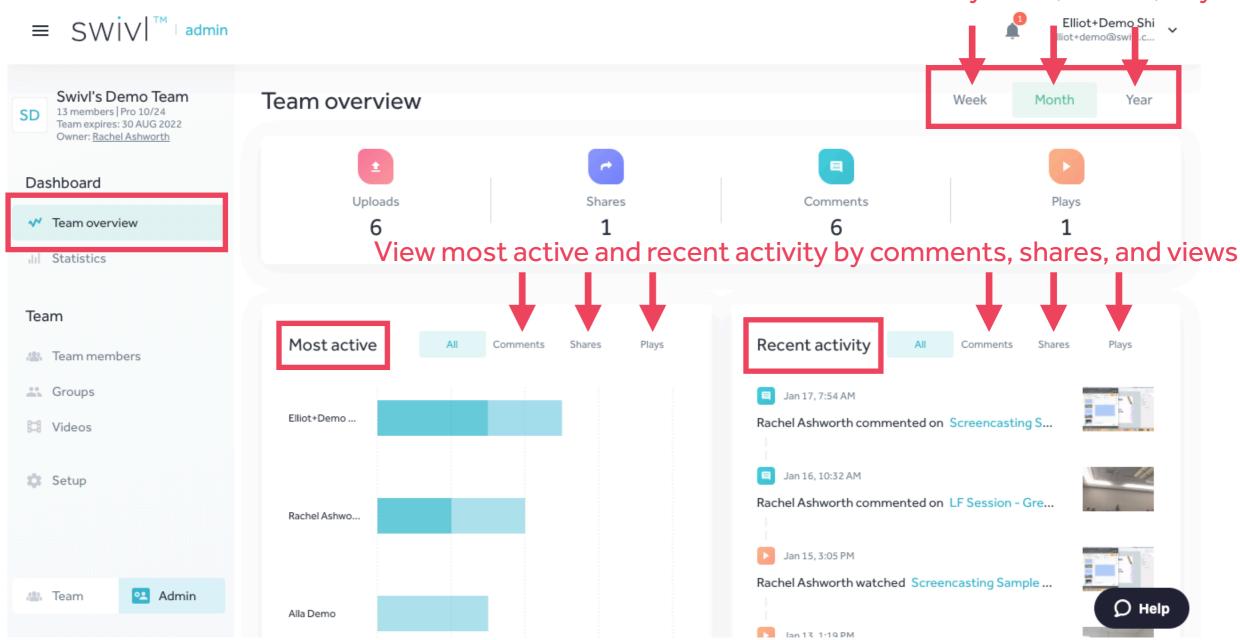


Team Subscription and Composition

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.

SWIV'S Demo Team Is members | Pro 8/24 Team expires: 30 AUG 2022 Owner: Rachel Ashworth Dashboard ✓ Team overview Istatistics

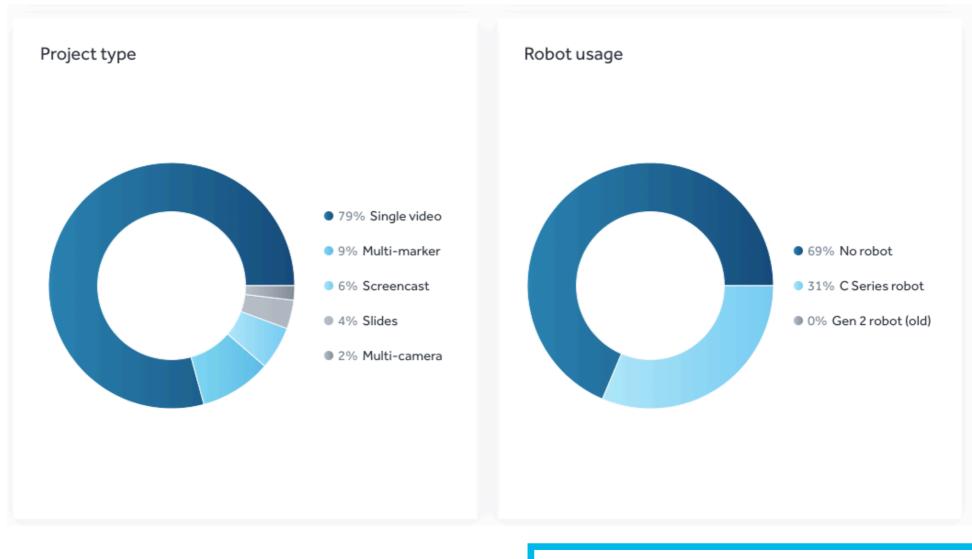
Dashboard - Overview



Filter view by week, month, or year

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.



*If you notice a sudden drop in robot usage this month, perhaps your team members are experiencing technical issues? Contact <u>support@swivl.com</u> immediately!

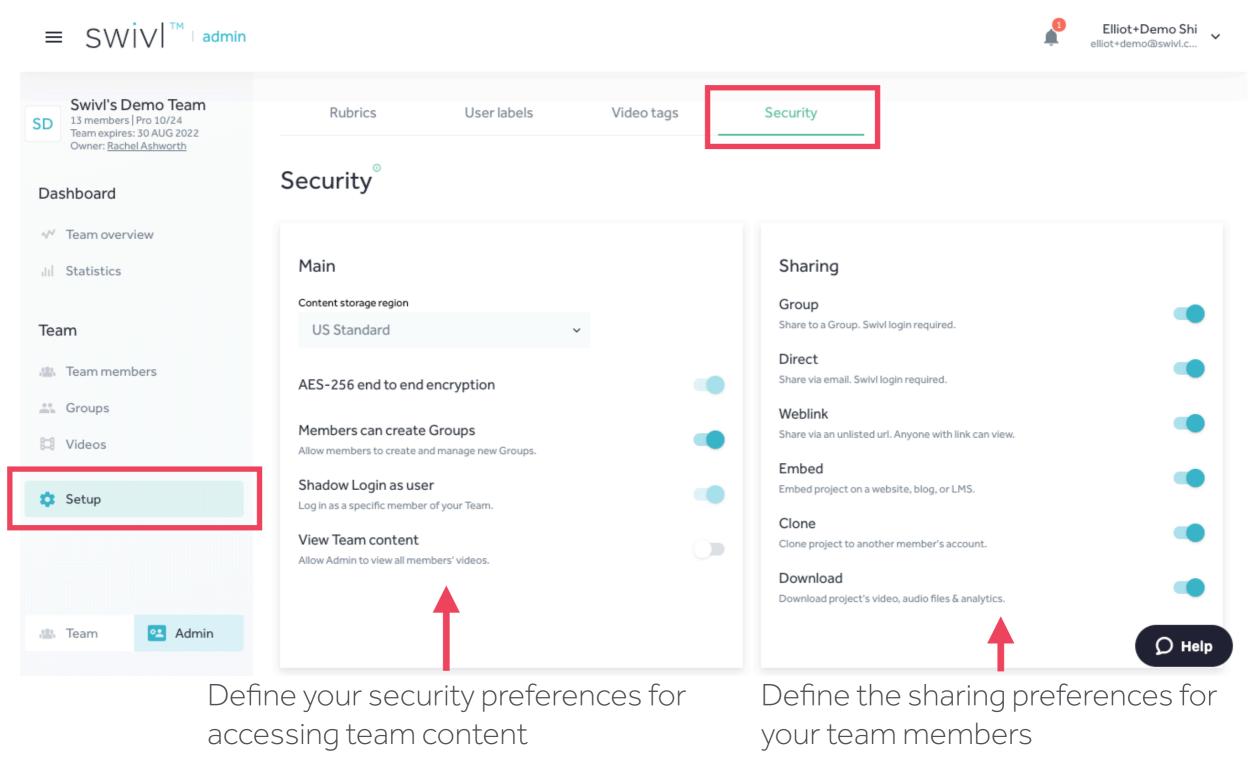
Dashboard - Statistics

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

≡ SWIVI [™] admin					e e	Elliot+Demo Shi liot+demo@swivl.c 🗸
SD Swivl's Demo Team 13 members Pro 7/24 Team expires: 30 AUG 2022 Owner: Rachel Ashworth	Statistics	Members Groups	User labels		± De	ownload statistics
Dashboard	Q Search			Co	ount: 13 Show: 15	~ < >
✓ Team overview	Name	Videos Uploaded 🗘	Videos Shared $\hat{\circ}$	Videos Played 💲	Comments Made 💲	Last Active 🗘
III Statistics	Rachel Ashworth	1	0	7	7	17 Jan, 2020
Team	Okharchenko+Demo K	25	12	0	2	08 Jan, 2020
🗥 Team members	Amanda+Demo Regan	7	5	5	31	05 Nov, 2019
🚢 Groups	Alla Demo	5	0	3	0	30 Dec, 2019
🛤 Videos	Elliot+Demo Shi	11	9	3	13	09 Jan, 2020
🏟 Setup	Mbilorosiuk+Demo Bilorosiuk	0	0	0	0	
	Amanda+Demo1 Regan	2	1	0	0	14 Oct, 2019
	Rachel+Demo1 Swivl	0	0	0	0	
🗥 Team 🔼 Admin	Reggie Deyo	0	0	0	0	Q Help
	Camille Smith	0	0	0	0	y Help

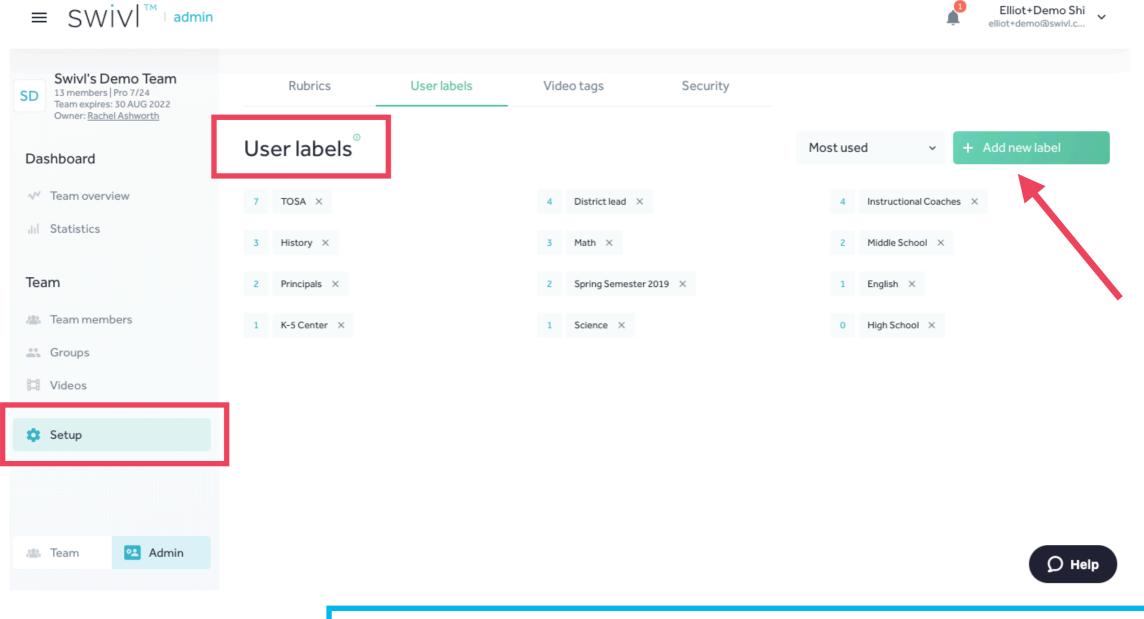
Setup / Security

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.



Setup - User Labels

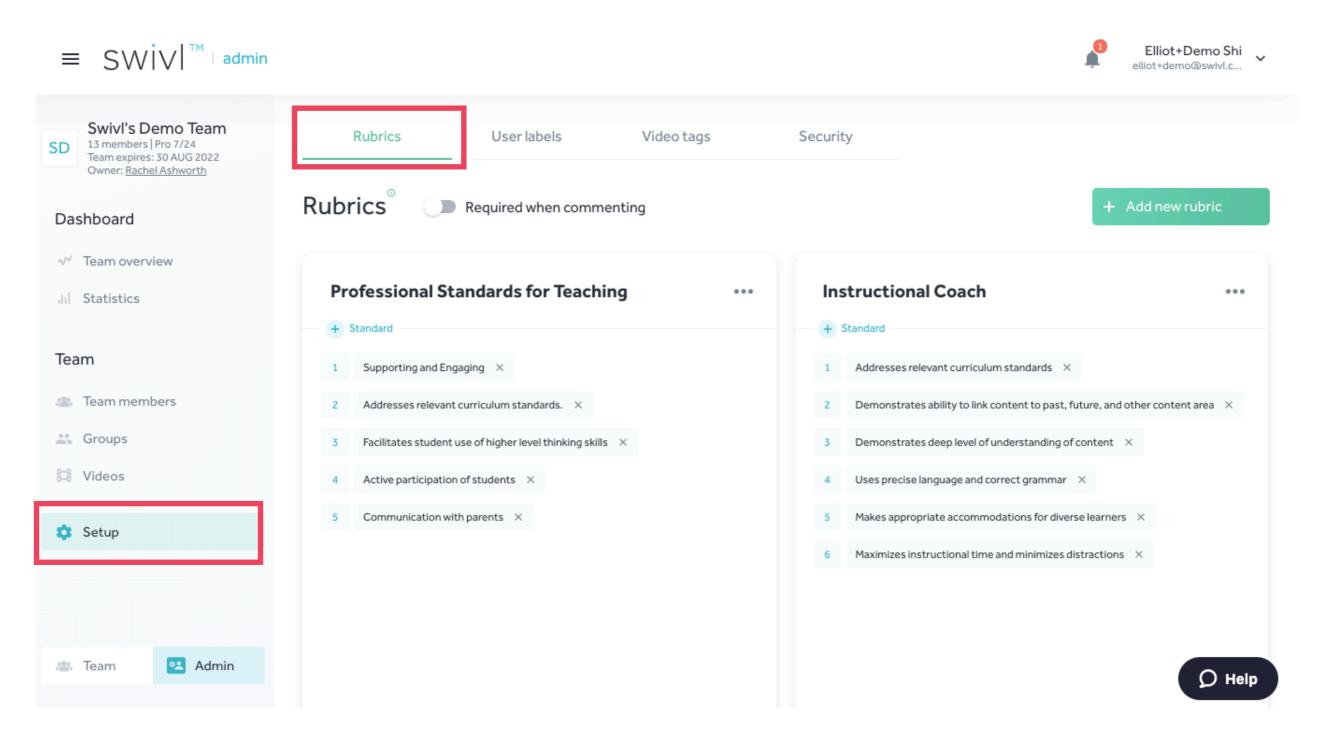
User labels are optional but will help you identify and sort team members in your team table quickly and easily.



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

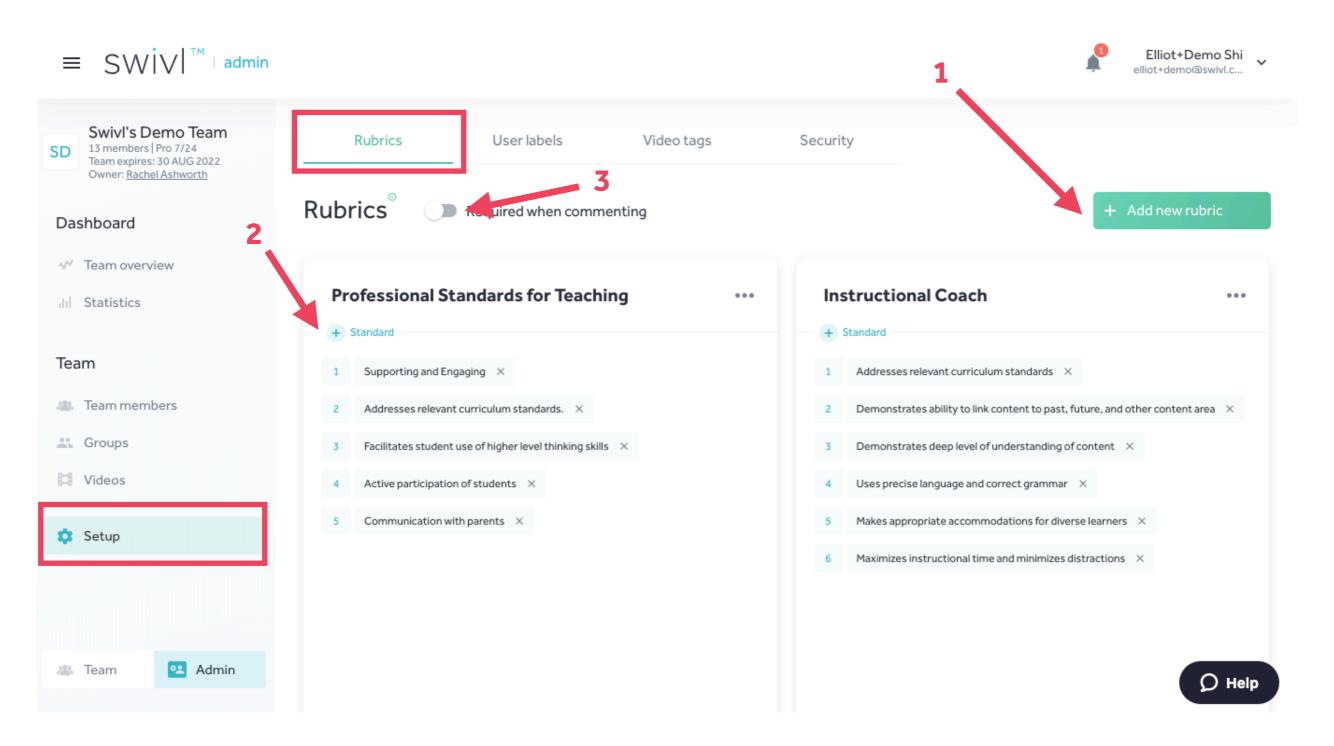
Setup - Rubrics

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

		= Filter Comments
Professional Standards for Tea ^ Professional Standards for Teaching Instructional Coach Admin Rubric Facilitates student use of higher level thinking states	Clear all	 00:00:42 Amanda+Demo Regan: I like how you explain to everyone where the marker needs to go. Demonstrates deep level of understanding of content 1 answer 00:01:21 Elliot+Demo Shi: Good instruction
Active participation of students Communication with parents		Uses precise language and correct grammar 1 answer 00:01:26
		C 00:00:46 ● Everyone Post comment here
		E Rubrics 1 0/800 Post

Δ

Setup - Tags

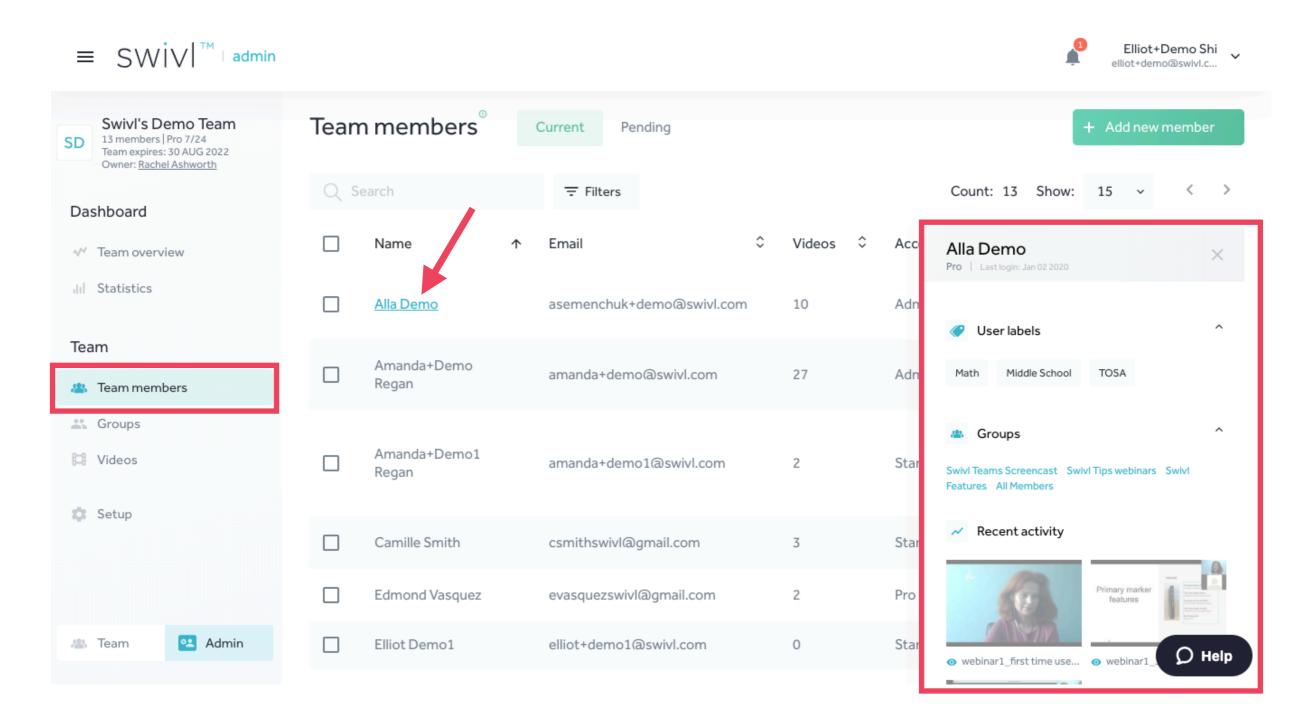
Create your own video "hashtags" or your users can populate this tag library when they provide a title and summary for their video. You may delete any tags, which will remove tags from any associated videos.

\equiv SWIV TM admin				Elliot+Demo Shi elliot+demo@swivl.c
SD SD SD SD SD SD SD SD SD SD SD SD SD S	Rubrics	User labels	Video tags Security	
Dashboard	$Videotags^\circ$			Most used ~ + Add new video tag
Team overview	3 #MultiCamera ×		3 #MultiMarker ×	1 #Baker High School: Class A 1 ×
III Statistics	1 #English \times		1 #Math \times	1 #Screencasting \times
Team	1 #Slides \times		0 #Argumentation ×	0 #History ×
Team membersGroupsVideos				Press this button to add a new user label!
💠 Setup	1			
	1		organization; ass	using video tags to encourage sembling best practice libraries is a a you can filter videos out of your feed by

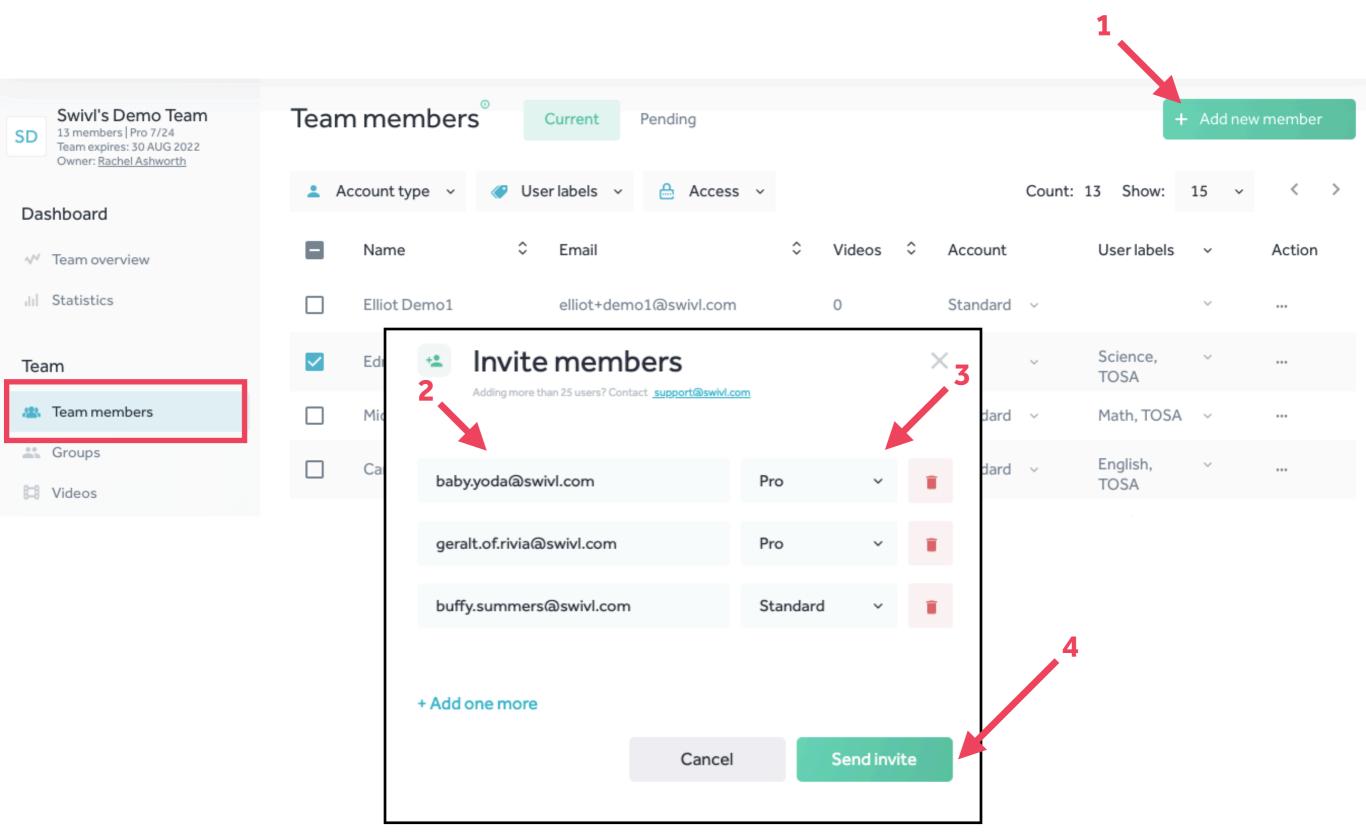
searching for specific tags.

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 ir	nvited to the Clime				Ð	Ø
S	Swivl Cloud <info@swi< th=""><th>^{ivl.col n}*This email com</th><th>nes from '<u>info@swivl.com</u>'</th><th>4:08 PM (0 minutes ago)</th><th>☆</th><th>*</th><th>:</th></info@swi<>	^{ivl.col n} *This email com	nes from ' <u>info@swivl.com</u> '	4:08 PM (0 minutes ago)	☆	*	:
		A Company	SWIVI				
			teams! e Internation team by your colleague (1990) sustainable video observation platform works				
			to enjoy everything that your team has to off	,			
		AWLNPRUg157 something secu	inistrator has set 2008 as wivl.com as 79738128 as your password. Please reset your re and specific. loud and your Swivl app with your new crede	our password to			
			RESET YOUR PASSWORD				

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.

	You've been ir	nvited to the Elliptic Te	n Swivl cloud 🔉	Inbox ×		8	Ø	
S	Swivl Cloud <info@swi to</info@swi 	vivl Cloud <info@swivl.com></info@swivl.com>		2:21 PM (1 hour ago)	☆	•	:	
			swivl™					
		Hi Elliot Shi,						
		You've been invited to the Elliot's Team on Swivl cloud by your colleague (@swivl.com. Please accept your invitation by clicking <u>here</u> . Watch this video to learn about all of your new capabilities as a team member!						
		Sv	vivl Cloud Basics Video					
		Contact your Team admin to lear	n more: en swivl.com					
		Regards, The Swivl Team						

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.

≡ SWIVI™	Elliot Shi elliot+test1@swivl.com
Dashboard	Institutional Account Terms and Conditions
Recent activity	You have been invited to be part of Elliot's Team's Team Swivi cloud account. There are many advantages to you being part of a Team account - common sharing space, group management, and other
My projects	features. Your team's account administrator is responsible for managing members within account limits, including your account. If limits are exceeded, the administrator will be given a means to upgrade or expand the services to meet team needs. The administrator will also be able to observe usage with various tools, to monitor activity, and create group distribution capabilities as well as manage other features. In some cases, administrators are able to see your videos and associated analytics and comments.
Folders	By clicking "Accept invitation" you agree to accept your team's oversight and account management. Accept invitation
ї Library	
Shared with me	
≪₀ Feed	
🔐 Groups	

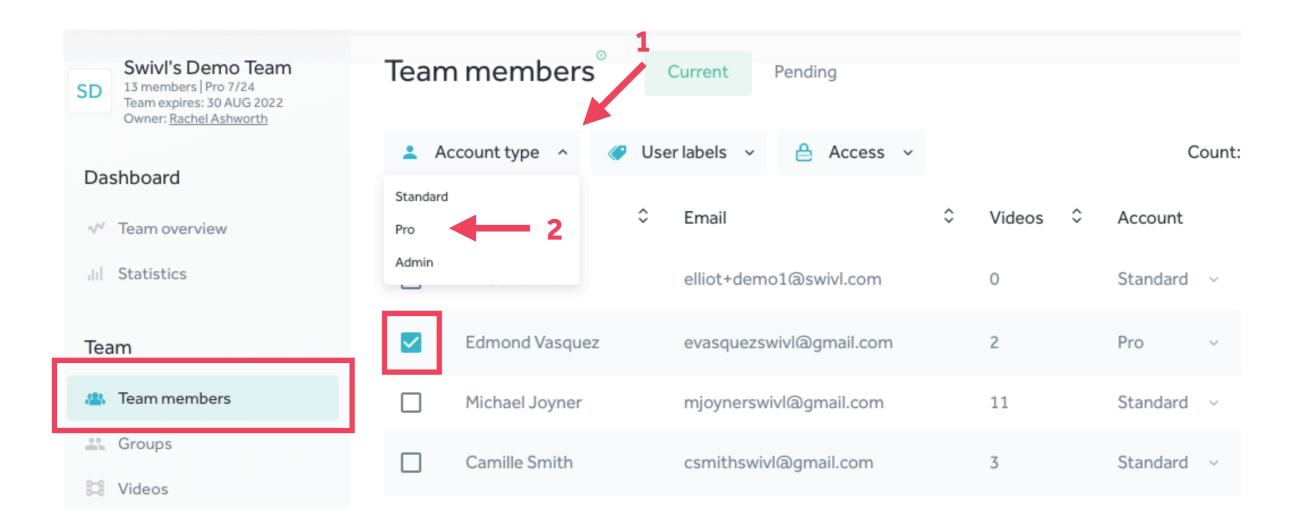
Team - Team Members / Assigning User Labels

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."

SD SD SD SD SD SD SD SD SD SD SD SD SD S	Tean	n members		+	+ Add new member					
Dashboard	. A	ccount type 🗸	🧳 User labels \land 🔒 Acce	ss v			Count:	13 Show:	15 ~	< >
✓ Team overview		Name	Q User labels	\$	Videos 🗘	Account		User labels	~	Action
III Statistics		Elliot Demo1	Math Middle School		0	Standard	~		~	***
Team		Edmond Vasque	Spring Semester 2019		² 3	Pro	~	Science, TOSA	×	
🗥 Team members		Michael Joyner	Principals		11	Standard	~	Math, TOSA	~	
GroupsVideos		Camille Smith	Cancel App	ly	3	Standard	~	English, TOSA	~	•••
🌣 Setup		Reggie Deyo	rdeyoswivl@gmail.com		13	Standard	~	K-5 Center, TOSA	~	
		Rachel+Demo1 S	Swivl rachel+demo1@swivl.co	om	0	Standard	~	Middle School, Principals, History,	×	

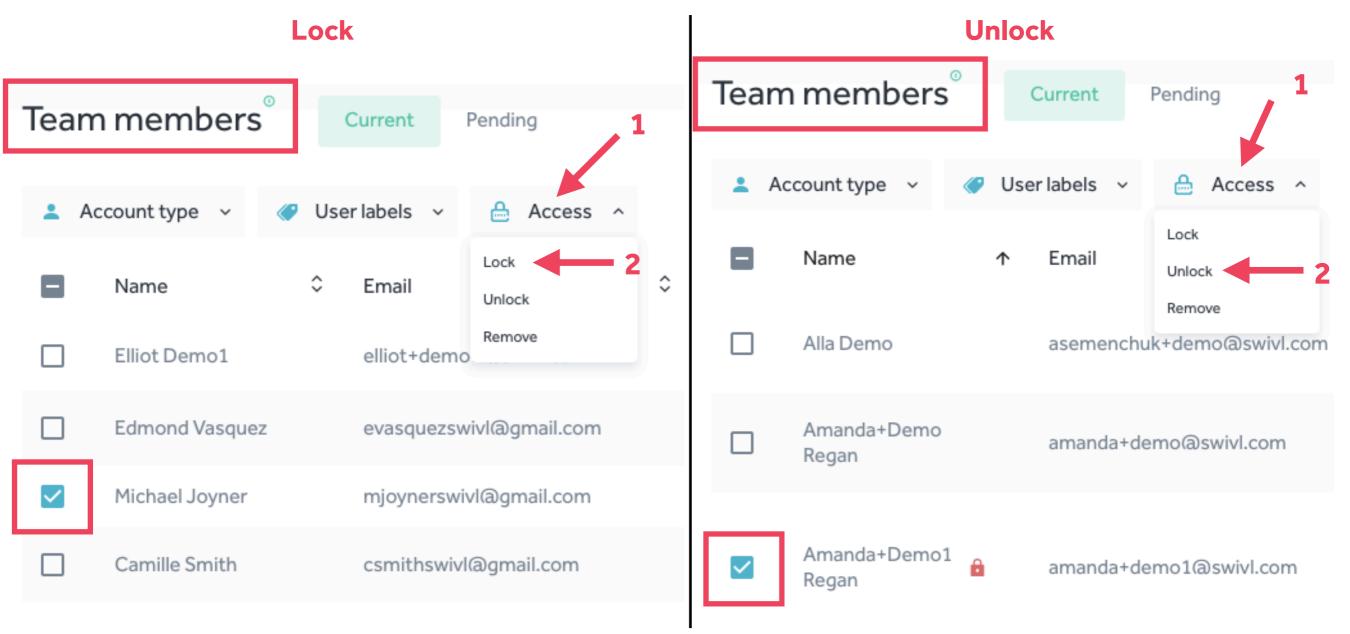
Team - Team Members / Change Account Type

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.



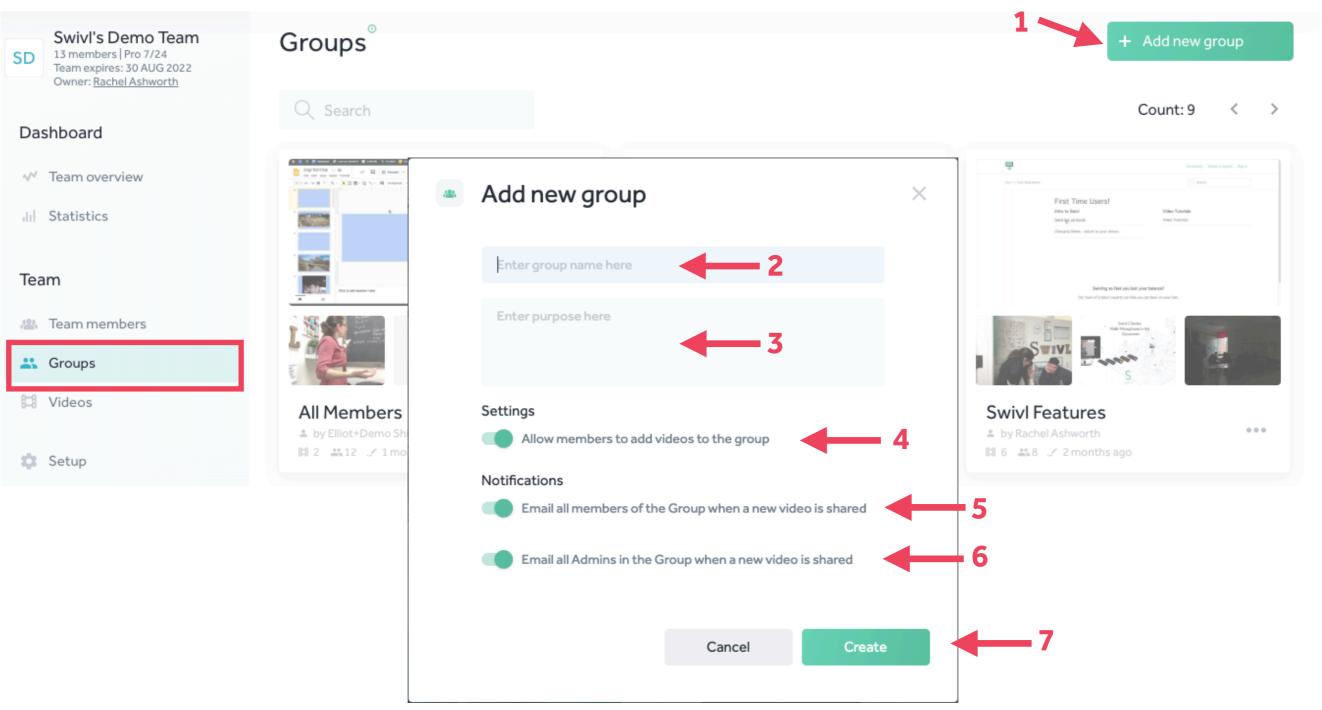
Team - Team Members / Remove

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.

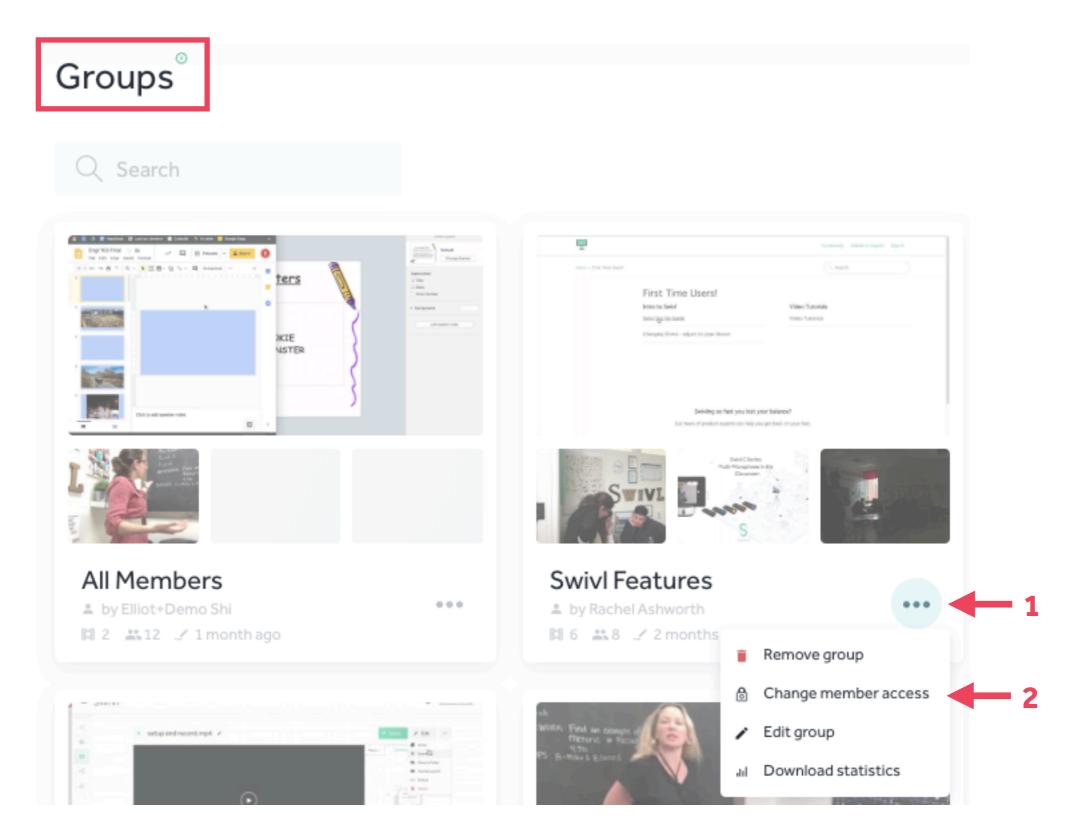
SD SD SD SD SD SD SD SD SD SD SD SD SD S	Team	n members [®]		Current	Pending	1			+	Add ne	w member	
	. Ac	ccount type 🗸 🤞	🌮 Use	er labels 🗸 🗸	🔒 Access 🔺			Count:	13 Show:	15 ~	< >	>
Dashboard √ Team overview		Name	Ŷ	Email	Lock Unlock	Videos 🗘	Account		User labels	~	Action	
III Statistics		Alla Demo		asemenchu	Remove k+demo@swivl.com	10	Admin	~	Math, Middle School, TOSA	×		
Team Team members		Amanda+Demo Regan		amanda+de	mo@swivl.com	27	Admin	~	Instructional Coaches, District lead	×		
 Groups Videos Setup 		Amanda+Demo1 Regan		amanda+de	emo1@swivl.com	2	Standard	v	Spring Semester 2019, History, District lead	~		
- Cotop		Camille Smith		csmithswiv	l@gmail.com	3	Standard	~	English, TOSA	×		

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.

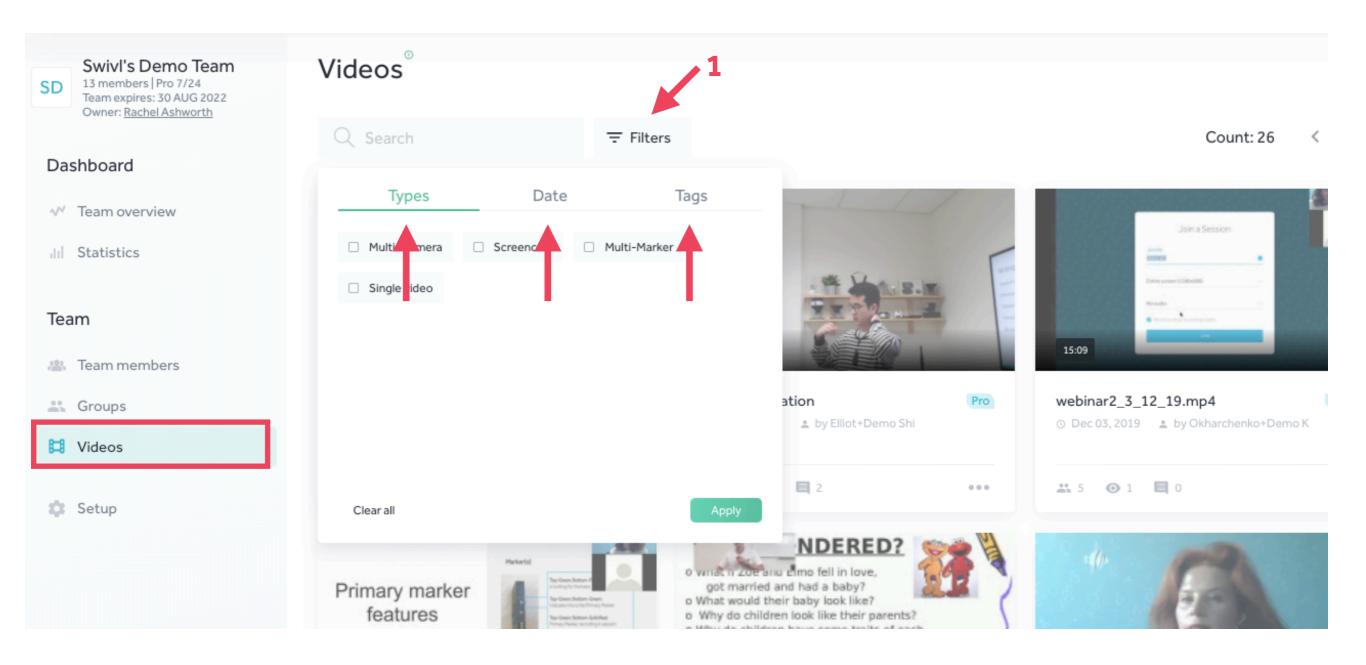


Team - Groups / Change Member Access



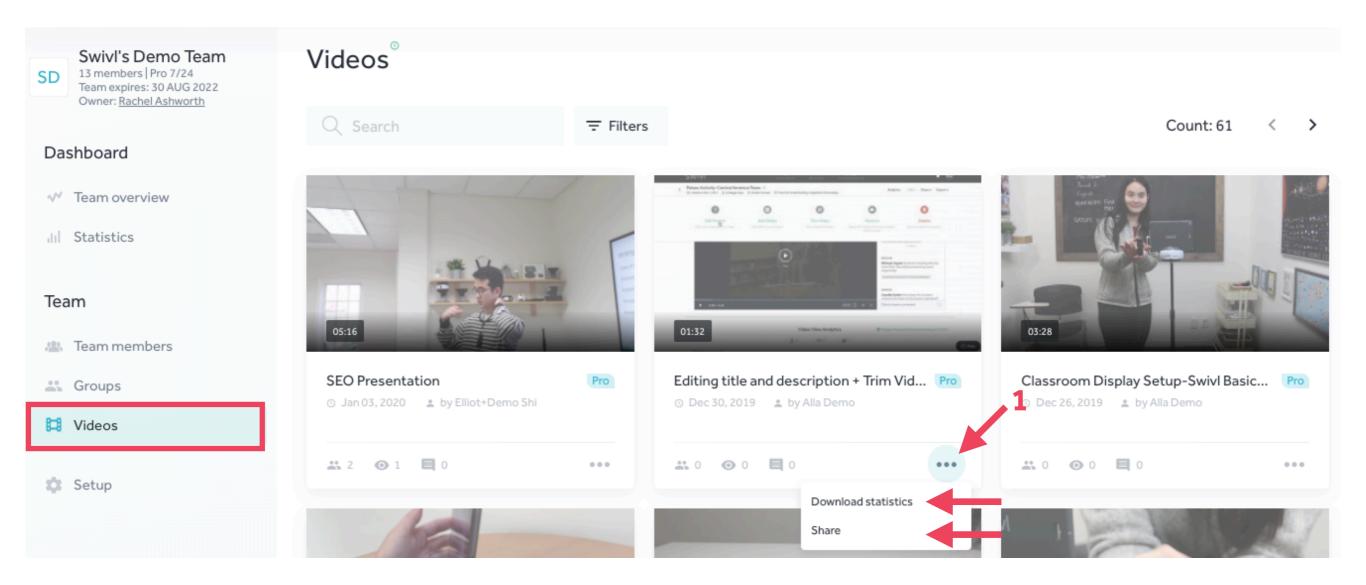
Team - Videos

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.



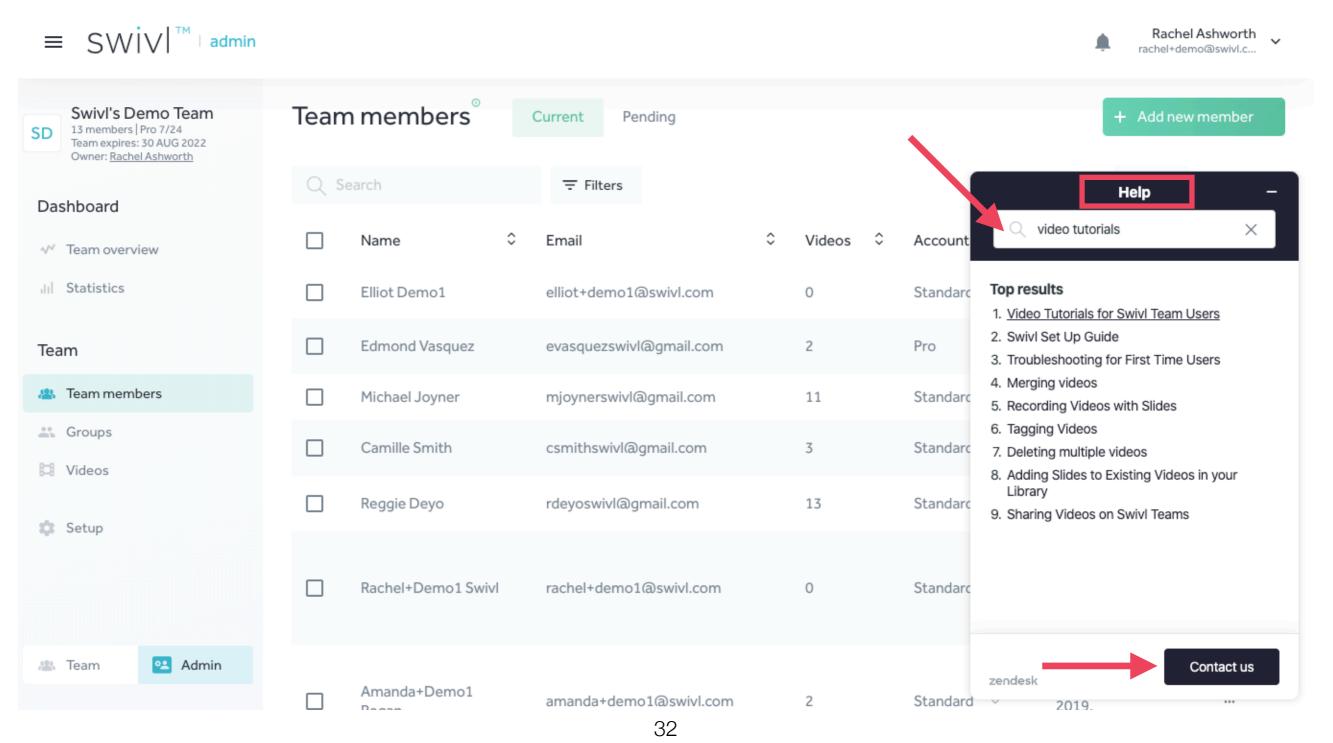
Team - Videos / Reporting

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

