Team and Group Creation Wizard

The Team and Group Creation/Customization Wizard ("The Wizard") would appear the first time that a potential coach logs into the site.

Roles

Coach as a site Role

In the event that we want to give EduGuide users access to the team creation process, we would need to designate them as a coach on the site. As a coach, they would see the link "Create Team" on their "My Teams" page. Clicking this link would take them into the team creation process.

EG Admin as a team/site role

We will want to set up a hidden role within the team called "Admin" which would allow us to modify a team, then designate another user as a coach.

Designating a new team member as a Coach

Once the team has been set up, EduGuide Staff would send an invitation to a partner or partners which automatically adds them to the Coach group. The first person who accepts the invitation to join the team would first see the typical new member orientation (vision statement, profile questions), but as a coach they would be shown an additional screen which asks, "Would you like to customize the team?" This screen will show up for each designated coach until someone says "yes."

When the user clicks "Yes," they would be taken into a separate orientation flow which walks them through the process of customizing and/or setting up the team.[1]

Team Customization Priorities

The user would be prompted to enter the following team information as a part of the team setup. If the team has been created for them, the user would be asked to review the entered information and make changes where needed:

- Team Title
- Description
- Objectives
- Eligibility Requirements

Next, the user would be asked to set the value for each of these team settings. These might appear individually on each page, or they could be grouped together.

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[1] Under the conditions of a user creating a new team, they would be shown the team set up wizard first without the yes/no question

- Team Joining Moderation
- Team Library Accessibility
- Advisors (Yes/No)
- Show team Header Image (Yes/No)
- Goals Enabled (Yes/No)
- Restricted Members (Yes/No)

Profile Questions

Depending on the circumstance, the user might be prompted to create profile questions, or they might be asked to review questions which have already been entered in for them. We could save this until the end or leave it as an option which they would click before being taken to the page for editing the profile questions.

Groups and Invitation Codes

The orientation screen, or page within the site if we refer the user there, would consist of a table or grid structure. The first three rows of the table would be taken up by information for the site's default team roles: Coaches, Members, and Mentors. Following each of these roles would be a member count, and a link to a modal which would show the coach invitation information. After the user enters their first custom group, they would also see on the line next to the group's name a checkbox which allows them to enable the invitation code for that group. Enabling this option reveals a link which would show them the code and invitation URL for the group.
The coach can create as many groups as possible from this screen, or skip it until later when they can work on this. The orientation screen would mirror a page within the team's setting pages.

Navigation

Coaches would be able to access the Group Management page from Team Settings, and from the Member Management page. If the coach closes out of the Team Customization screen, the wizard would be accessible from the team's main navigation menu.