Adding Activities

This article explains Activity functionality for Catalog Admins with the Blended Learning release. Focus areas include activity creation, permission/visibility options, navigation, and other important settings.

Click a hyperlink below to jump to that topic:

Quick Navigation Tips:

To create activities, Catalog Admins will go directly to Activities > Add/Edit Activities; select Create Activity.

Blended learning

This term describes the combination of two legacy activity types: Online Learning Programs (OLPs) and face-to-face Meetings. Blended learning offers a more linear path to manage all activity types.

The following permissions are required for Catalog Admins to access the options mentioned below. Please reach out to your Organization Administrator if you require assistance with permissions or access.

Permissions	Actions	Access
Activity Management	Can Create Activity Can Edit Activity	Activities > Add/Edit Activities
Meeting Management	Can View Meetings Can Mark Attendance	Meetings tab in an activity Attendance tab in an activity
Roster Management	Can Update Status Can Award Hours/Credits	Roster tab in an activity
***Register**	Can Add Participants	Attendance tab in an activity Roster tab in an activity

*The ability to pre-register is based on a District Profile setting.

Adding Activities

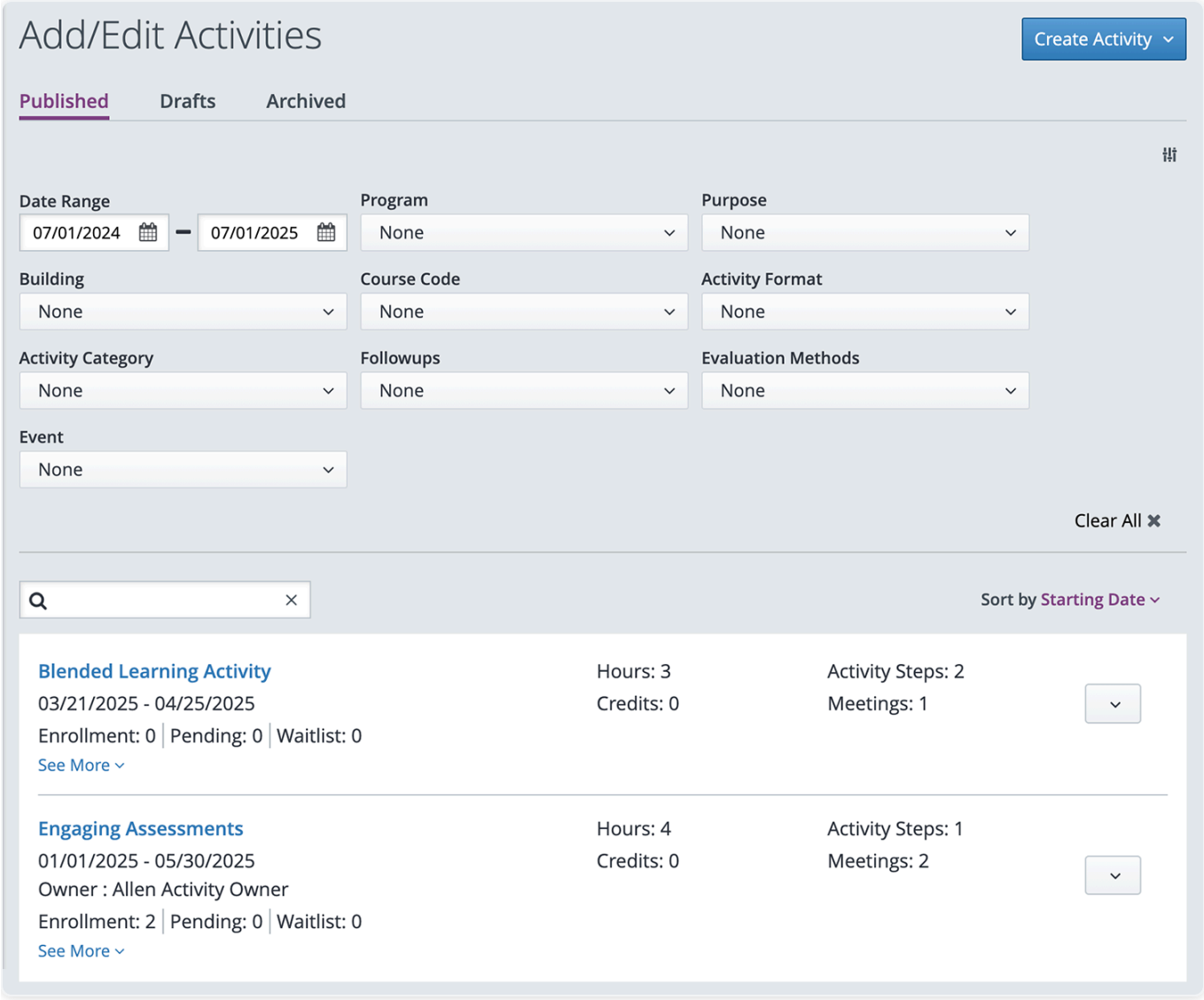
Access the Add/Edit Activities option in your application's side navigation to create or manage activities.

Access & Visibility: You must be a Catalog Admin with the "Activity Management" permission.

Navigation: Activities > Add/Edit Activities

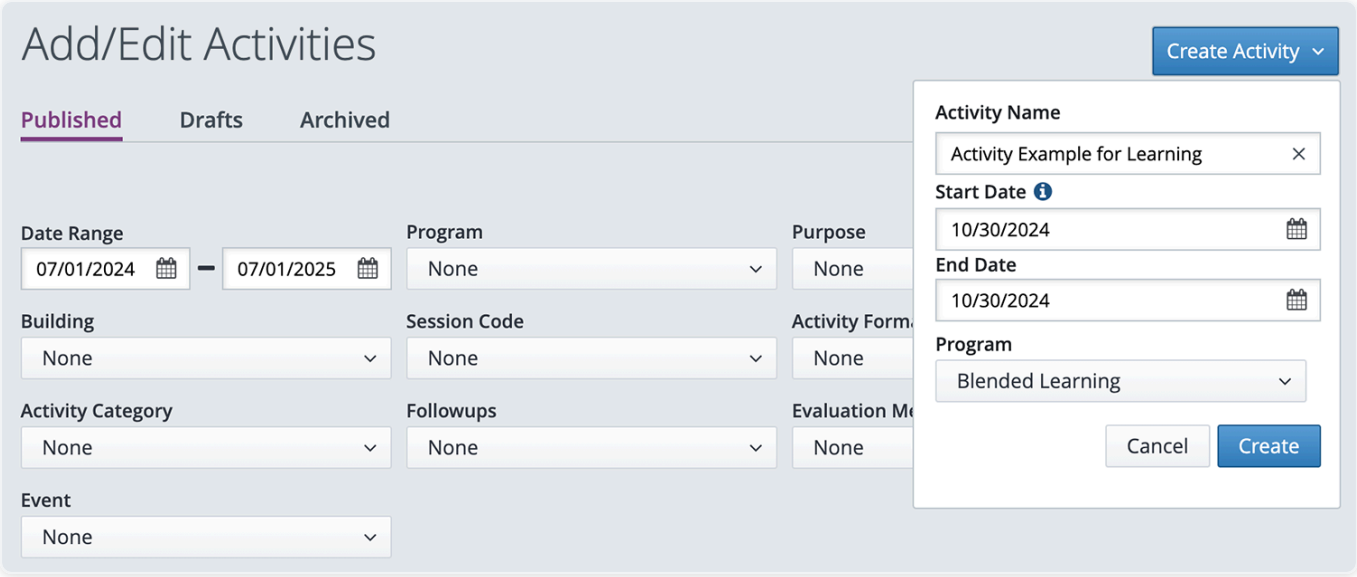
The Published tab opens by default. From here, you will see a list of activities created by any users at your organization who also have the Activity Management permission. The page also includes a Drafts and Archived tab, which will host your related drafts or archived activities.

You can either create an activity or select an existing activity link from the list to manage the activity's details, as needed. Remember to use the filter options to narrow activity results (e.g., Date Range, Program, Building, Activity Format, etc.).



Creating an Activity

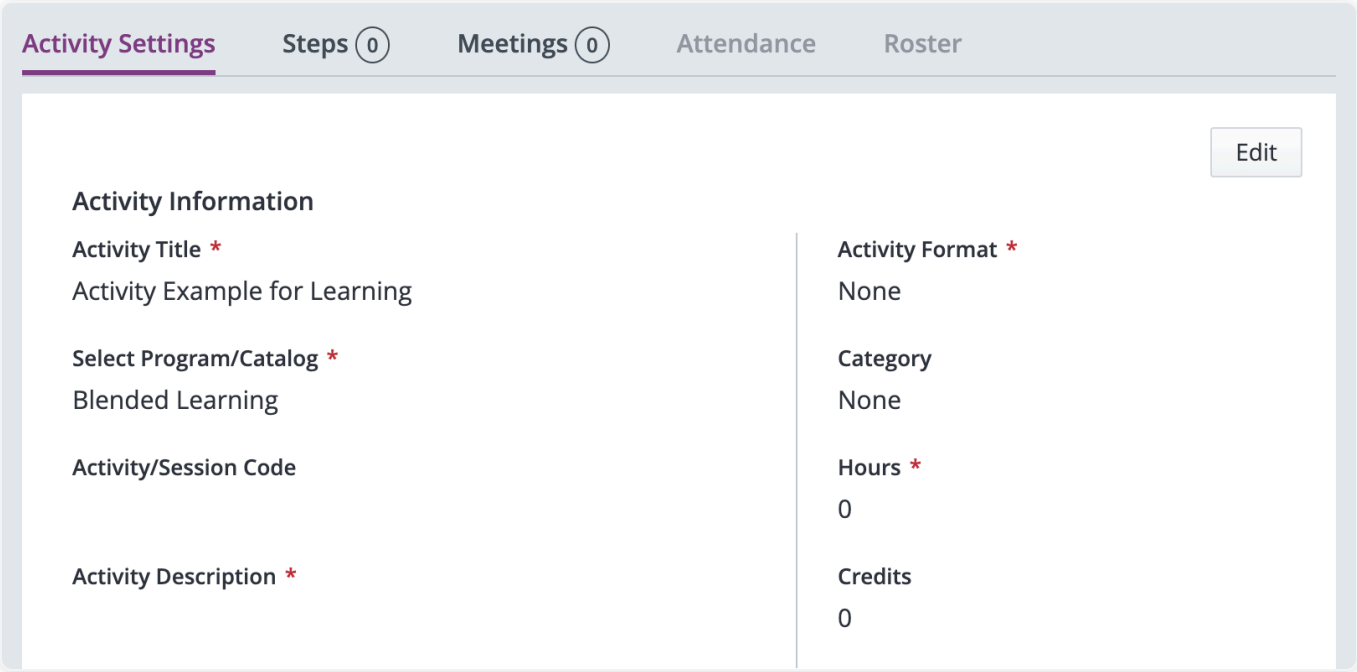
Click the **Create Activity** button in the upper right. Enter an activity name, along with the start and end date. Then, select the program where the activity should be listed in your catalog and click **Create**.



Once the activity has been created, you will add your activity details. These are organized by tab:

- Activity Settings: Details about the overall activity
- Steps: Resources for asynchronous learning
- Meetings: In person or virtual meetings

Required fields will be marked with an (*) asterisk, and these must be completed before the activity can be published. **Click the tabs below to for more information on each.**



Activity Settings

Activity Settings Tab

On the Activity Settings tab, click **Edit** to manage the activity details.

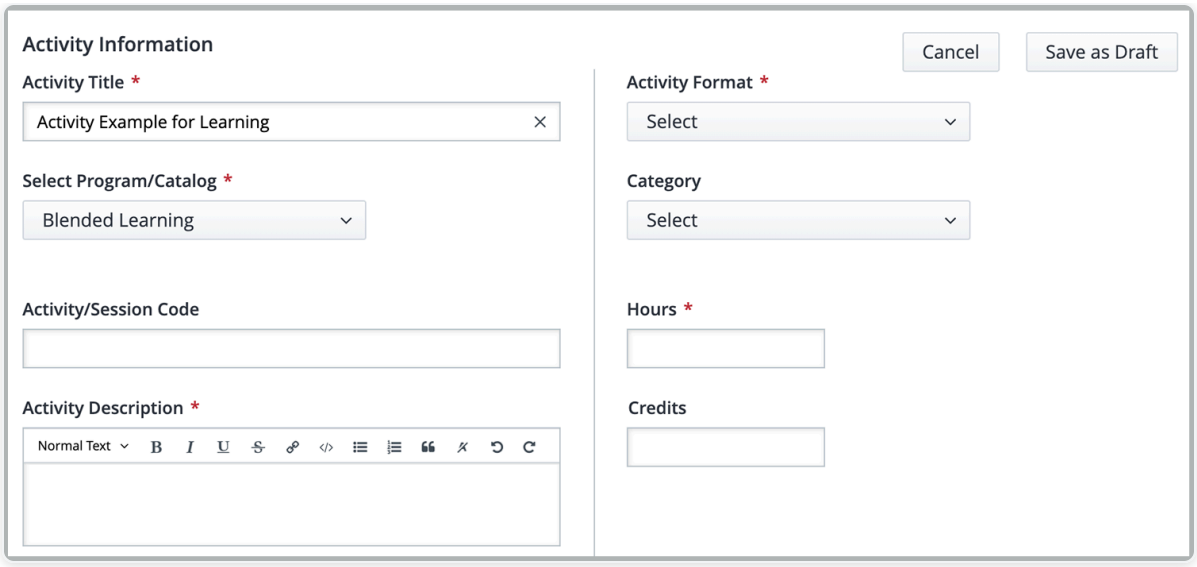
Select the following dropdowns to better understand each section of an Activity Profile form.

Some sections may differ based on the program and/or organization's preferences.

Activity Information Section

This section allows you to determine the activity type and activity format.

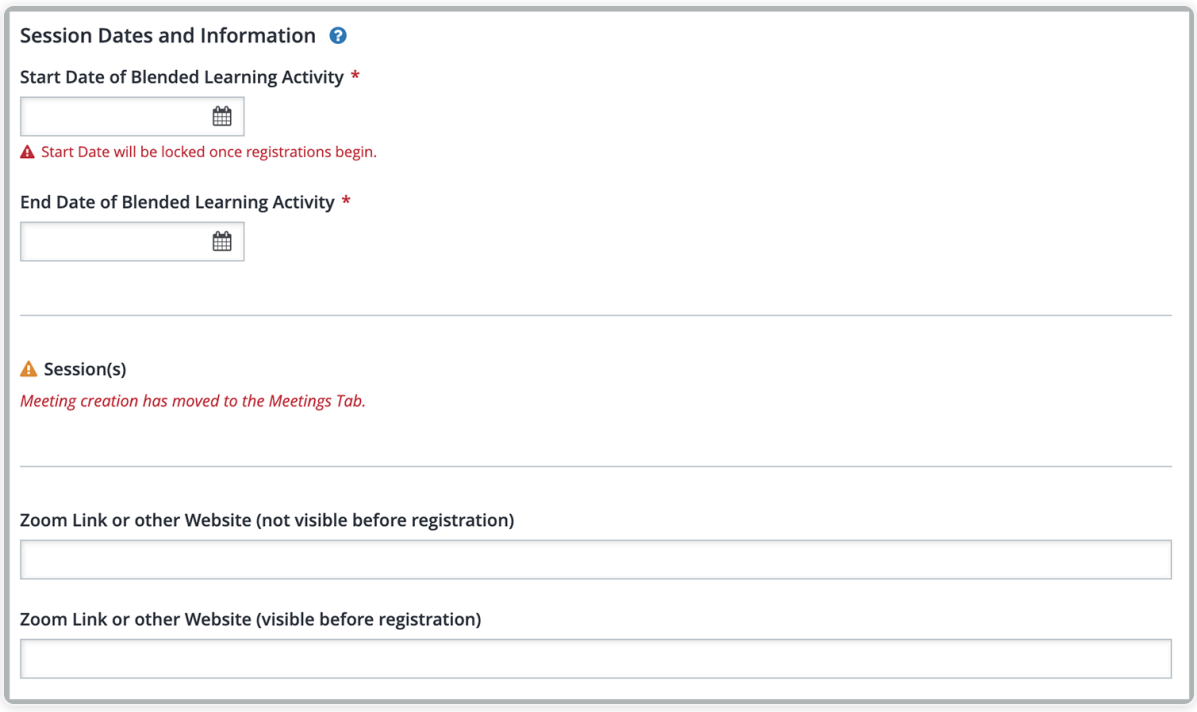
Activity Title*	Name of activity that appears in catalog, portfolios and reporting.
Select Program/Catalog*	Indicates the selection made during the initial Activity creation step.
Activity/Session Code	Indicates the code used for this activity.
Activity Description*	Details about the activity, such as expectations or included content.
Activity Format*	Single select field to choose the format/delivery method of the activity being offered.
Category	Optional field that may be required in some states for state-level reporting.
Hours*	Number of hours for activity; can use decimals (1.25 or 2.75).
Credits	Number of credits offered; typically used for activities that may be applied toward college credit or salary advancement.


Activity Information
Cancel
Save as Draft
Activity Title *
Activity Example for Learning
Activity Format *
Select
Select Program/Catalog *
Blended Learning
Category
Select
Activity/Session Code
Hours *
Activity Description *
Normal Text
Credits

Session Dates and Information Section

This section allows you to determine the date(s), time(s), and location(s) for the activity session(s).

Start Date of Blended Learning **End Date of Blended Learning**	Blended Learning must have a Start/End Date range. Face-to-face meetings should be created in the Meetings tab. The Start Date will be locked once registration begins.
Session(s)	Include one or more Zoom links or URLs, which are made visible following registration.



Catalog Viewing Options Section

This section allows you to determine when the activity is visible to learners in your catalog.

Start/Stop Showing On	These dates allow you to control when the activity will appear in the catalog. It may be helpful to think of it as when registration opens and ends. *Note the default time is midnight.

Provider Information Section

This section allows you to determine provider information.

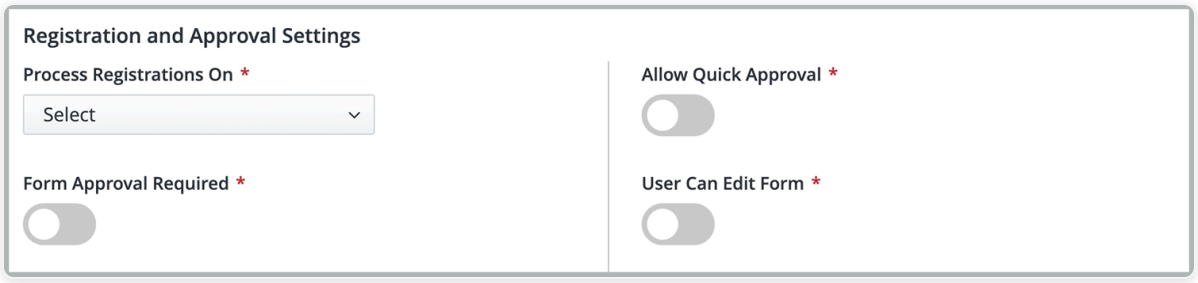
Provider*	Indicate the Provider affiliated with this activity. Choose from the dropdown or enter manually, if not included in the list.

Registration and Approval Settings Sections

This section allows you to manage registration and approval settings.

Process Registrations On*	Determines the registration form for the activity. The dropdown lists available registration forms in your organization. Sample forms include: • In-District PD Request Form (no subs) • In-District PD Request Form (subs needed) • Online Content Registration Form
Form Approval Required*	Determines registration approval options for the activity. No: Can register immediately w/ no approval. Yes: Needs approval in PLM to fully register. Note the following: • Approval process/routing are set on the form you selected in the "Process Registrations On" field. • Form Approval Required MUST be set to "Yes" when using Absence Integration. • Pre-Registration will bypass the approval process.
Allow Quick Approval*	Allows approvers with the Quick Approve permission to use a "one-click" approval without having to open the form.

User Can Edit Form*	Allows learners to view and add information to the registration form, as needed.



Participants Section

This section allows you to determine participant parameters for the activity.

Max Participants*	Upper limit for registration; activity registration will close once reached.
Min Participants	Optional field for information/reporting purposes.
Max # Wait List	Total allowed on wait list for full activities. When selected, PLM automatically adds learners from the wait list as registrants drop the course. *Be generous with the maximum, as it cannot be increased later.

Event Section

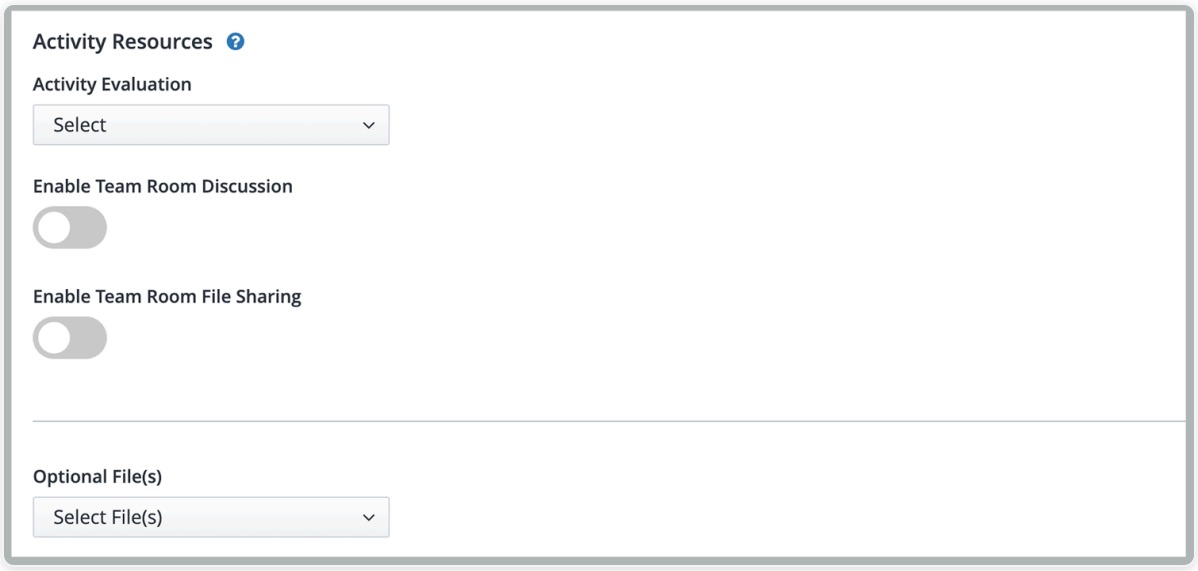
This section allows you to determine event affiliations.

Event this activity is part of	Select the event related to this activity.

Activity Resources Section

This section allows you to select *activity*-specific evaluations, in addition to your *form*-specific evaluation.

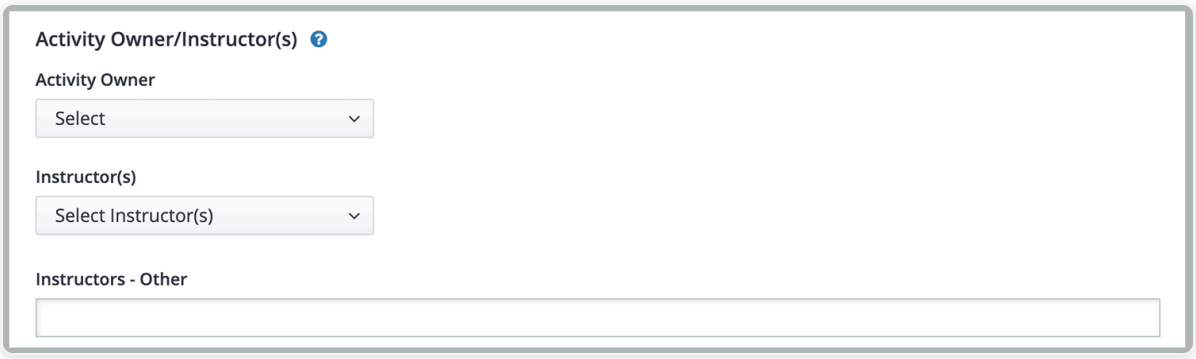
Activity Evaluation	Select the applicable activity evaluation.
Enable Team Room Discussion	Select the toggle to enable team room discussion.
Enable Team Room File Sharing	Select the toggle to enable team room file shares.
Optional File(s)	Select any files related to this activity.



Activity Owner/Instructor(s) Section

This section allows you to designate instructors and/or activity owners for the activity.

Activity Owner	Provides access to the activity from the Enrollment Tools List view. Only users who possess the Roster Management permission will appear in the dropdown. An Activity Owner has the same activity access as an Instructor, with two additional abilities: 1 Can complete activities, granting credits. 2 Can archive the activity, once complete.
Instructors	Provides access to the Instructor Tools List view for this activity, including ability to view rosters, print sign-in sheets, and designate attendance for learners. You do not have to designate an instructor if there are no associated meetings with the activity.
Instructor – Other	Space to designate an instructor who is not in the PLM system. (These are typically an outside facilitator.) *This fill-in field does not grant any system access, though will be available for use on certificates of completion.



Purposes Section

This section allows you to designate if the hours/credits should be applied to a configured purpose.

Purposes	Indicates reportable reasons users are engaging in the professional learning. Purposes are "buckets" that will calculate the total hours/credits earned thus far. **Examples include:** → Recertification → Salary Movement → Compliance → District Required PD

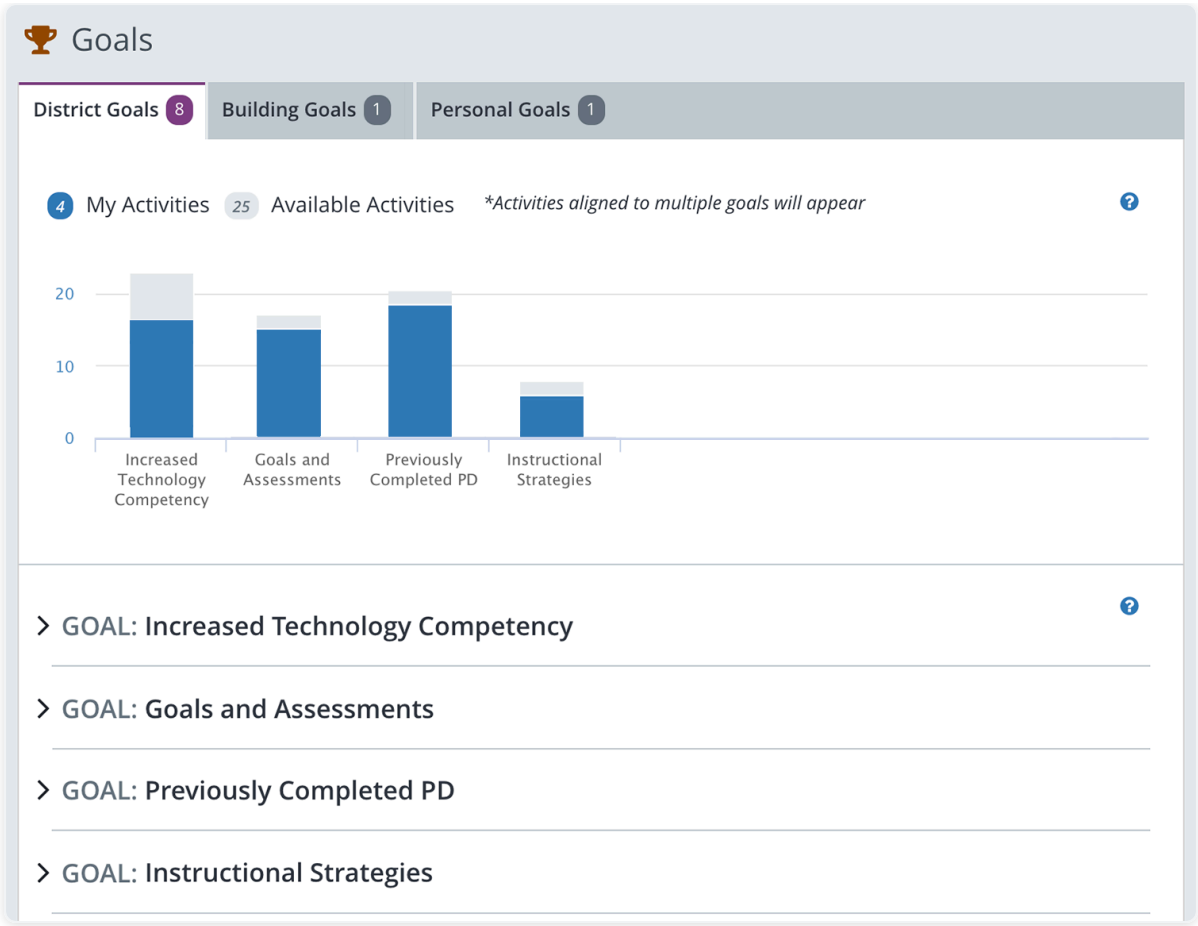
Goals and Objectives Section

This section allows you to determine options related to goals and objectives.

Select Objective(s)	Activities can be aligned to your organization goals; this helps learners connect with activities related to goals and is also reportable in PLM.

Pro Tip

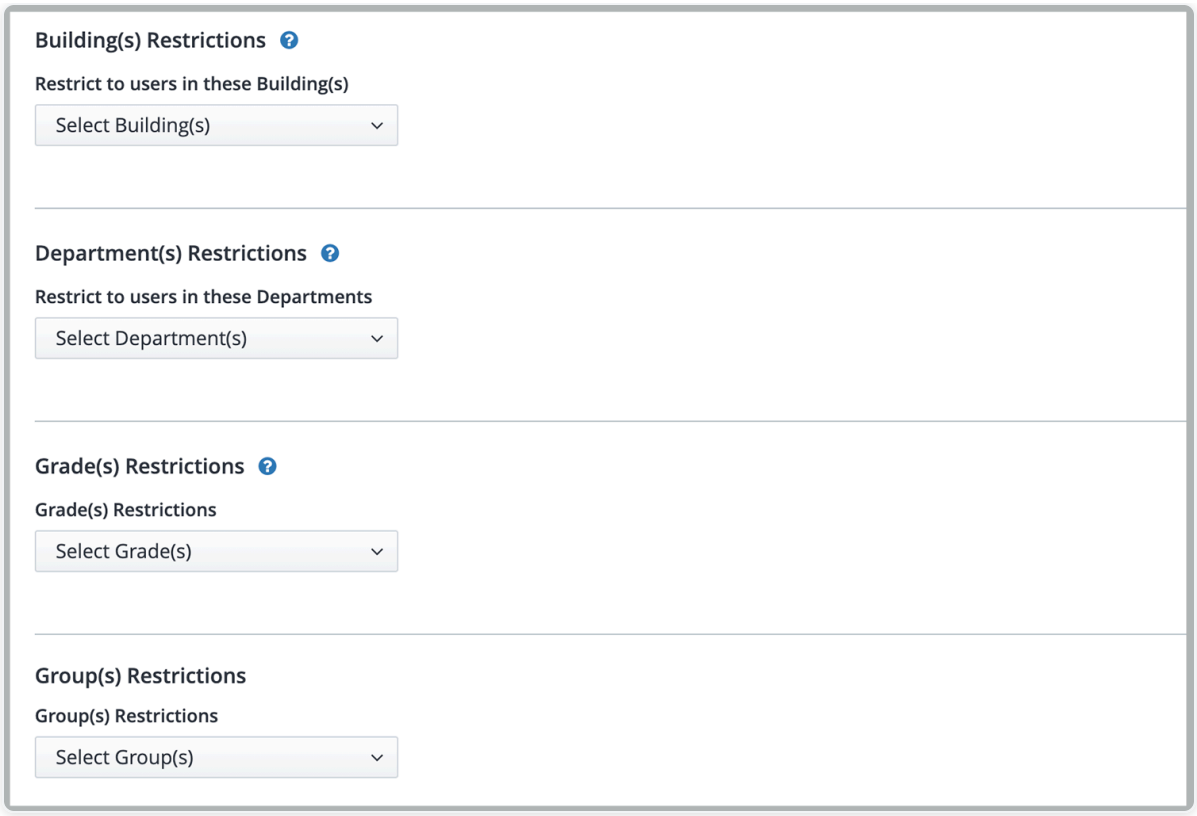
The act of aligning goals to activities enhances the My Growth Journey view for users, allowing visibility into how activities align with organization goals.


Goals
District Goals 8
Building Goals 1
Personal Goals 1
4 My Activities
25 Available Activities
*Activities aligned to multiple goals will appear
20
10
0
Increased Technology Competency
Goals and Assessments
Previously Completed PD
Instructional Strategies
GOAL: Increased Technology Competency
GOAL: Goals and Assessments
GOAL: Previously Completed PD
GOAL: Instructional Strategies

Restriction Sections

These sections allow you to designate restrictions for the activity.

Building(s) Restrictions	Check the buildings for which this activity is targeted. If open to all staff, leave all options unchecked.
Department(s) Restrictions	Check the departments for which this activity is appropriate. If open to all staff, leave all options unchecked.
Grade(s) Restrictions	Check the grades for which this activity is appropriate. If open to all staff, leave all options unchecked.
Group(s) Restrictions	Check the groups for which this activity is appropriate. If open to all staff, leave all options unchecked.



Remember to click **Save as Draft** once all selections have been made.

Go to Steps Tab

Steps

Steps Tab

Steps are used to add and organize resources for asynchronous learning. The total number of steps will appear to the right of the Steps tab in the activity.

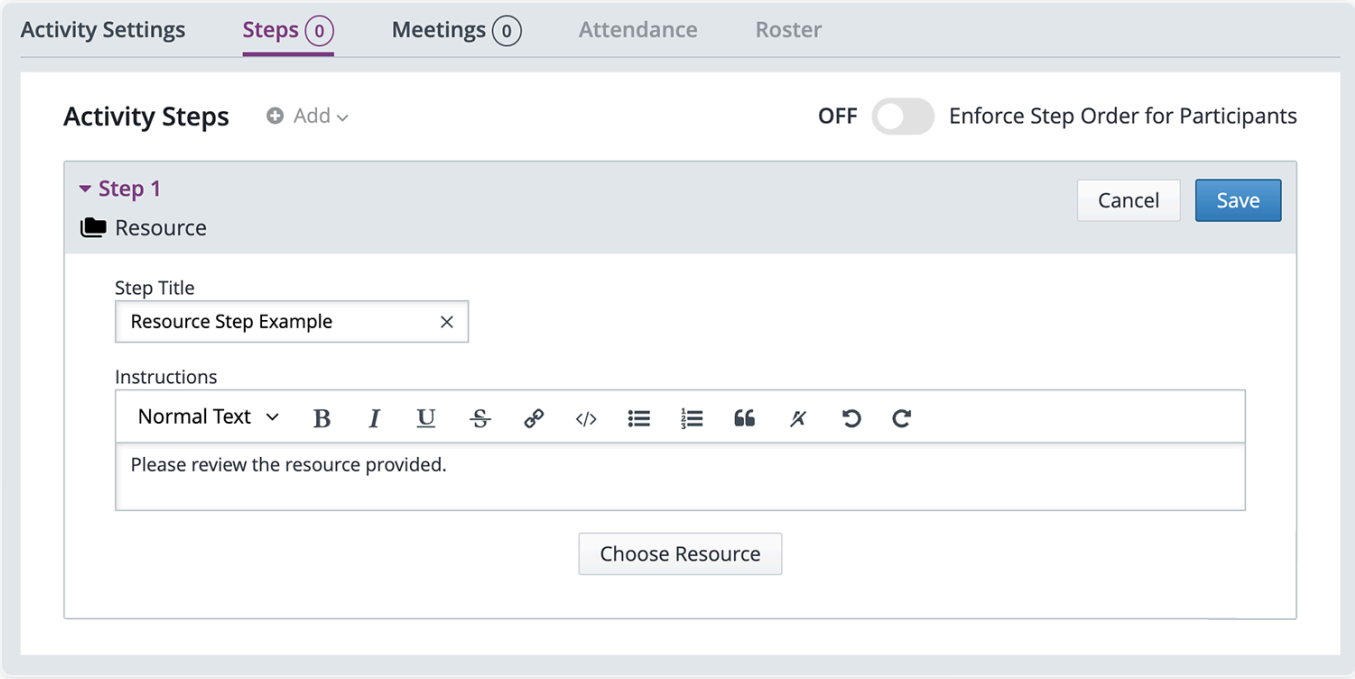
There are two types of steps available:

Step Types	
Resource	One resource can be added to each Resource Step to track completion. If the activity only includes steps, then it will Auto-Complete the activity for the user once all steps have been completed.
Generic	This step type is primarily meant for informational or instructional text.

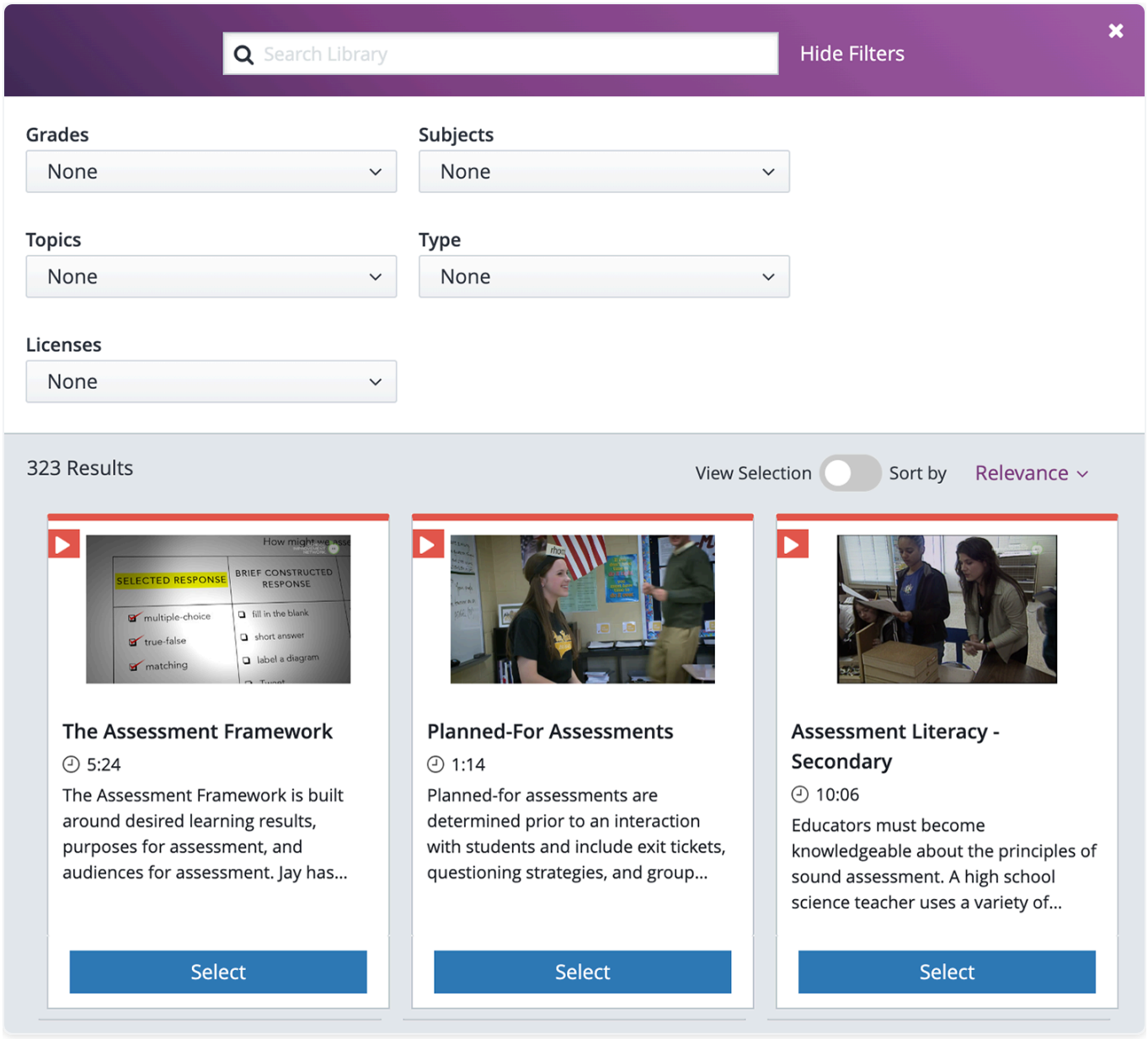
To add a step, use **+Add** dropdown. Select the Step Type and an optional Step Number. Step numbers allow you to insert new steps before or after pre-existing steps.

Resource Example

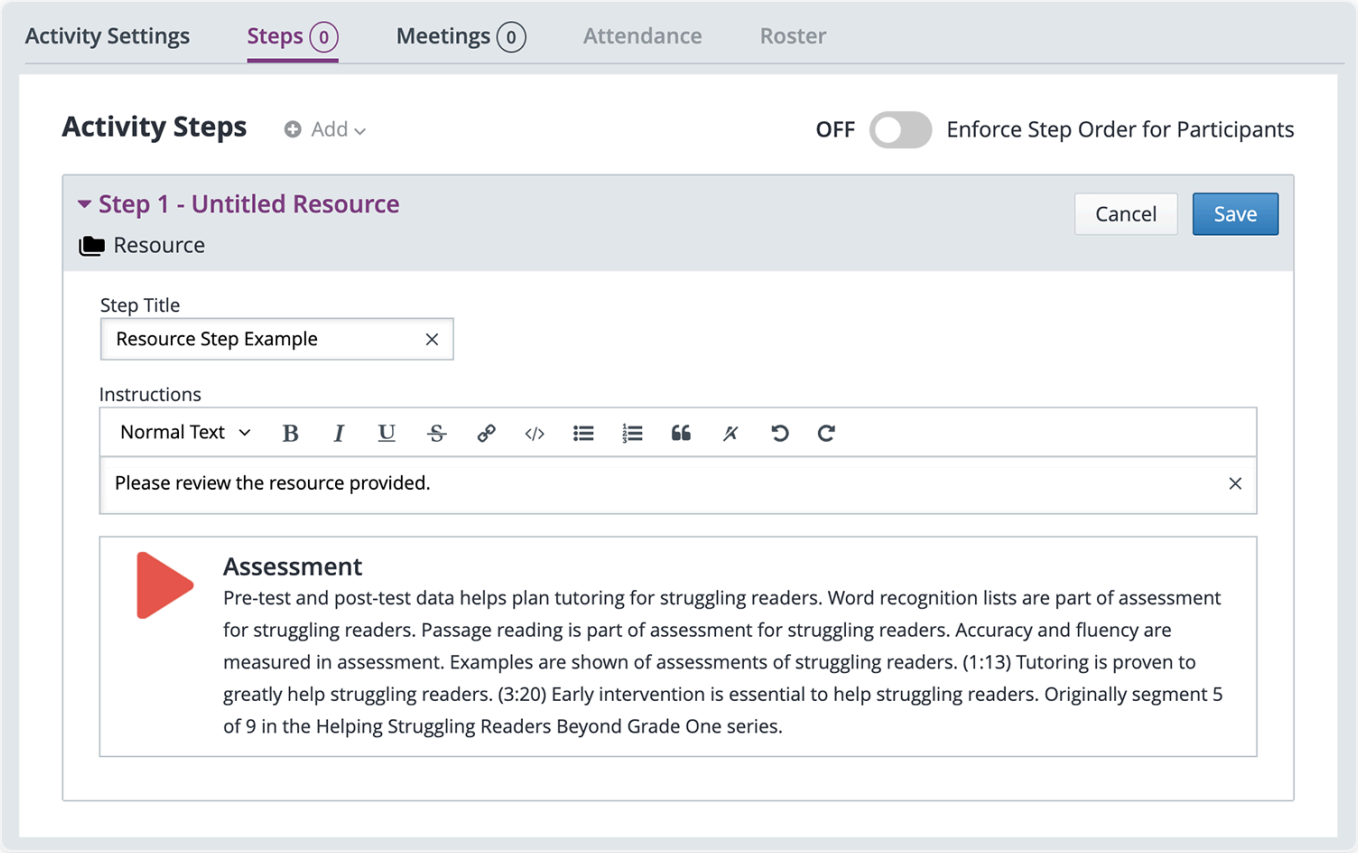
The Resource step will include a Step Title, Instructions, and a "Choose Resource" link. Select **Choose Resource** to access the Resource Library.



From the Resource Library, search or use advanced filters to locate and select the resource in question. Once a resource is selected, you can click **Add Resource** to add it to the activity.

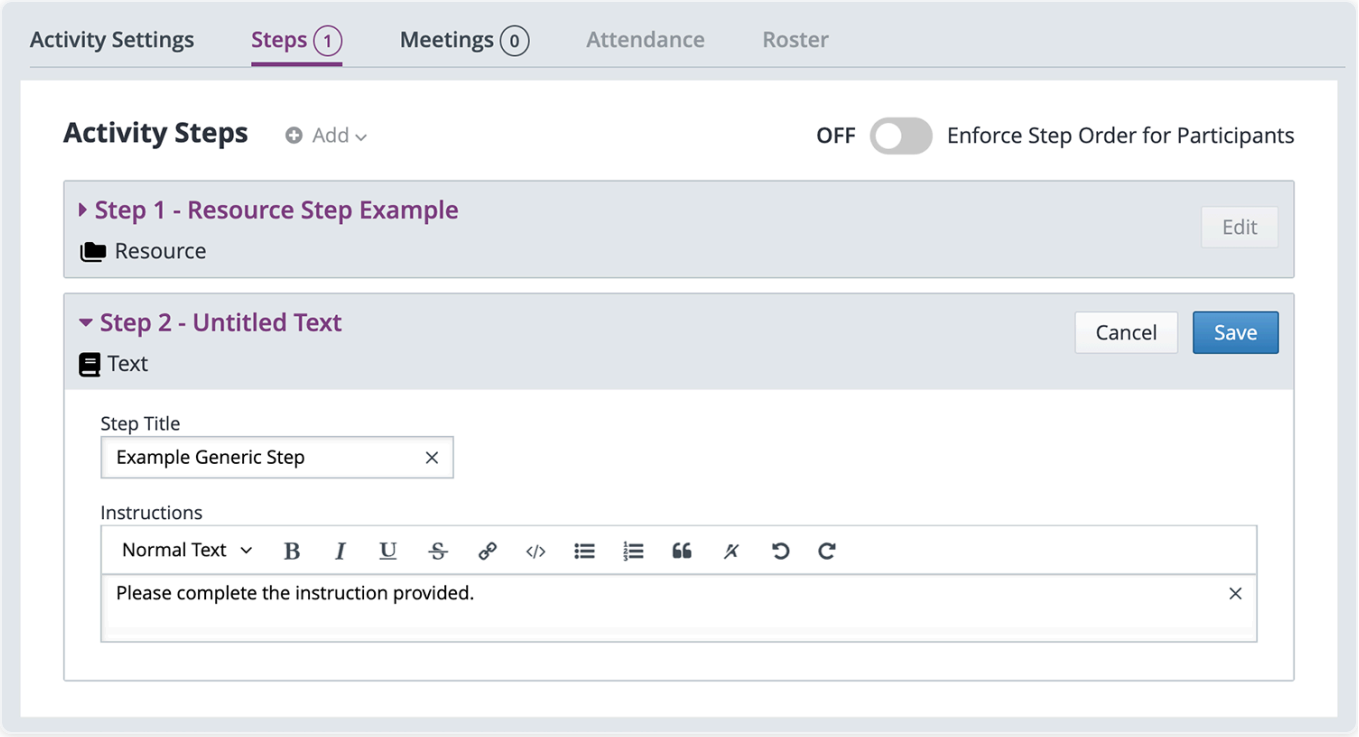


Click **Save** to record your changes once the resource is added to the Resource Step.



Generic Example

The Generic Step will include a Step Title and Instructions. Enter the information and click **Save** to record your updates.



The "Enforce Step Order for Participants" toggle requires users to complete each step in their prescribed order before a new step can be started.

Go to Meetings Tab

Meetings

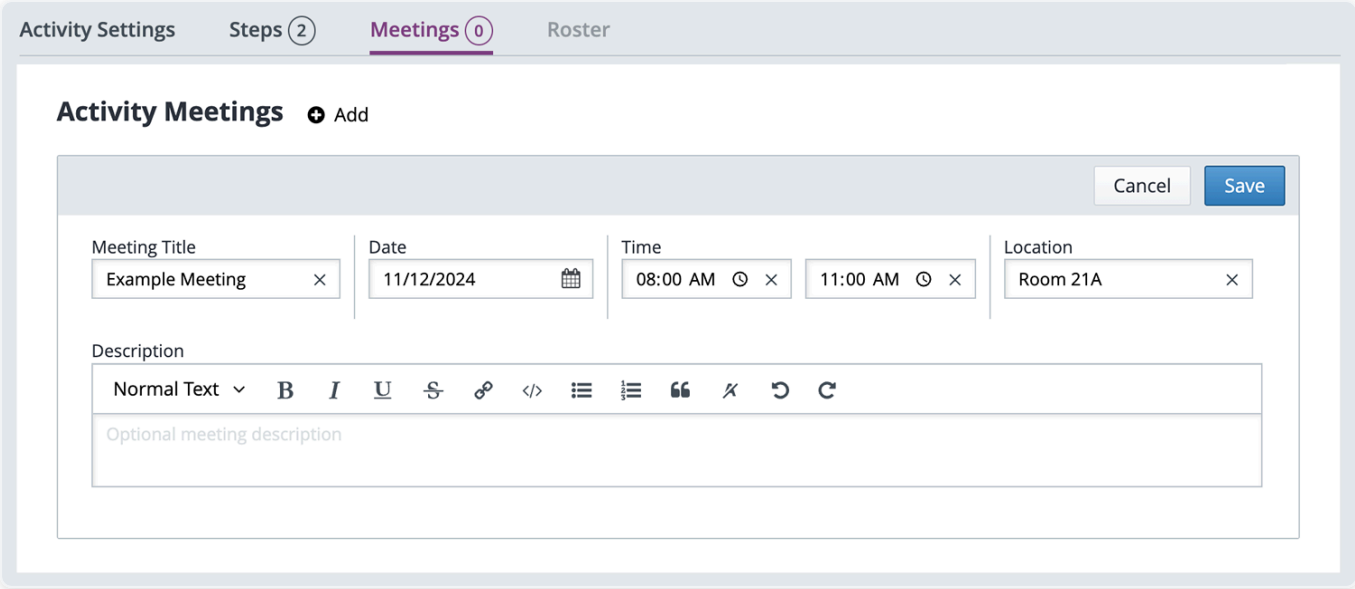
Meetings Tab

Use this tab to add and manage virtual or in-person meetings for the activity.

Add Activity Meetings

Click **+Add** to include an activity meeting. Activity meetings will include a Meeting Title, Date, Time, Location, and Description. Enter the information and click **Save** to record your updates.

When entering a Location, you can include both room names and/or URL links for online meetings.



Additional Resources: Managing Activities as a Catalog Admin

Go to Attendance Tab

Attendance

Attendance Tab

The Attendance tab is not accessible until after an activity is published. You will use this page to print sign-in sheets, manage participants, take meeting

attendance, and access activity evaluation results. For more information on this tab, see **Managing an Activity as a Catalog Admin**.

Go to Roster Tab

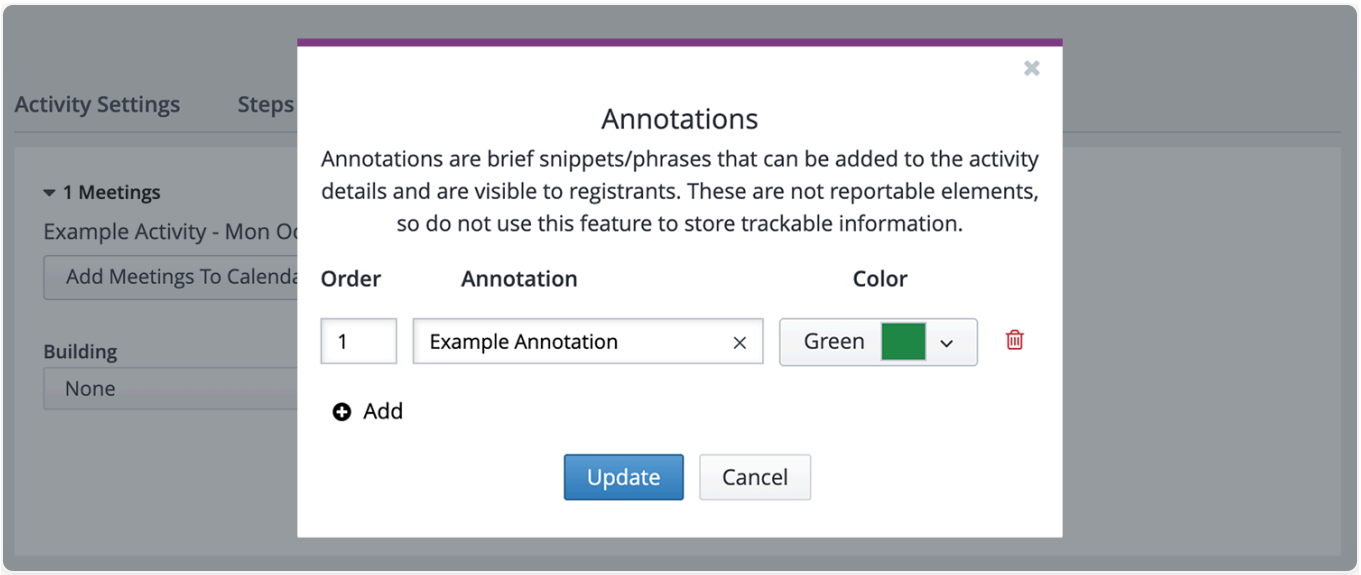
Roster

Roster Tab

The Roster tab is not accessible until after an activity is published. You will use this page to manage participants, update status, award hours/credits, and export activity information. For more information on this tab, see **Managing an Activity as a Catalog Admin**.

Note on Annotations

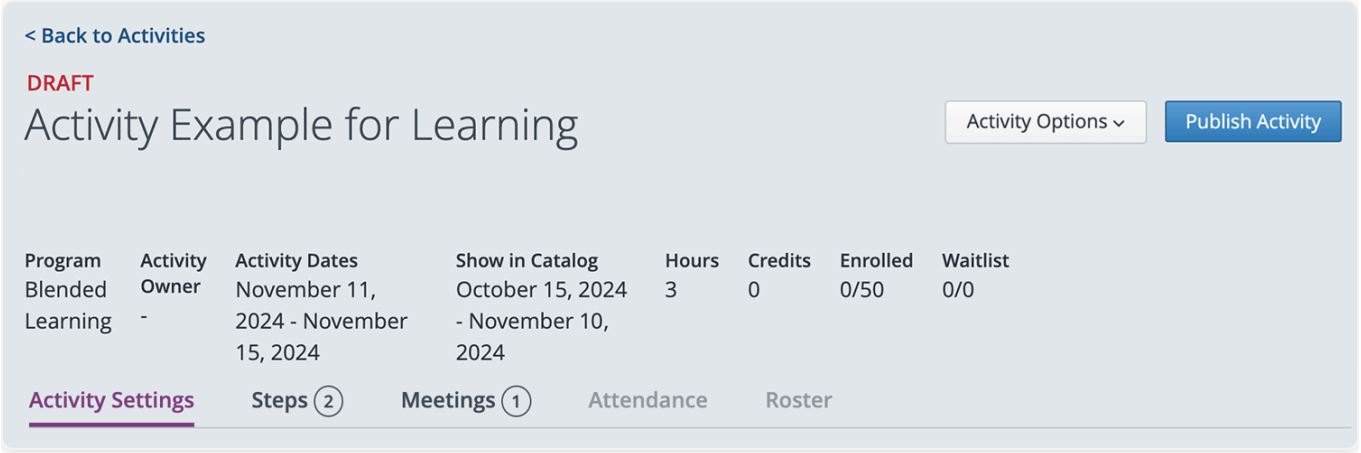
Annotations appear in a catalog and call attention to your activity. To add an annotation, click the **Activity Options** dropdown on the Activity page (upper right) and select **Add/Edit Annotations**. In the pop-up, click **+Add** and choose the Order, Annotation, and Color. Then, click **Update**. Once added, annotations will appear in the Catalog, in the Activity Creation workflow, and on a user's Launch Page.



Publishing Activities

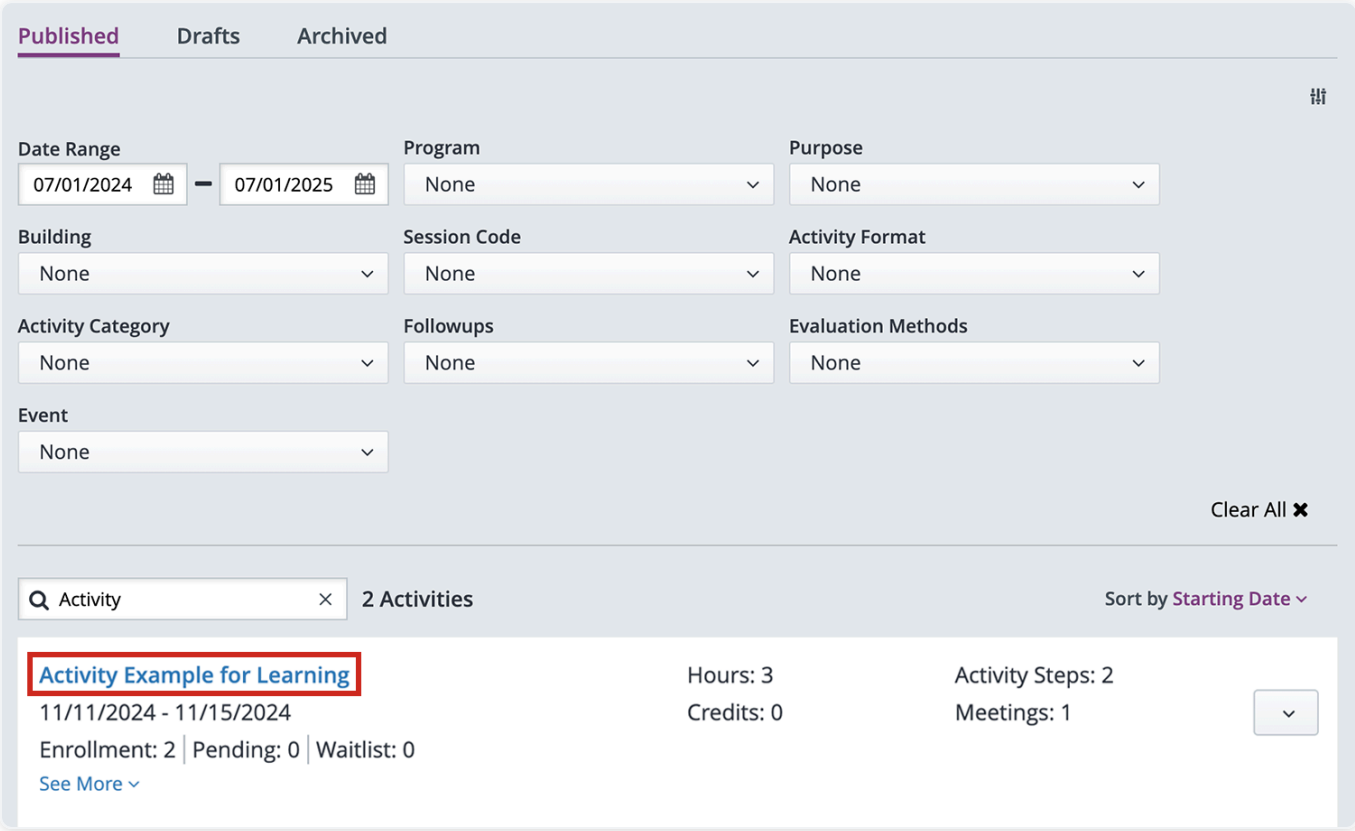
Before publishing, please review the activity information, including any resources and/or meetings. This is recommended, as some items such as meeting dates and times are not editable once learners enroll. *If you are not ready to publish, you can alternately save the activity as a draft and return to it at a later time via the Drafts tab on the main Activity page.

Once you have configured all the settings and added all the Steps and Meetings to your satisfaction, click **Publish Activity**. The activity will be made available in the catalog based on the Catalog Start Showing Date, determined in Activity Settings.



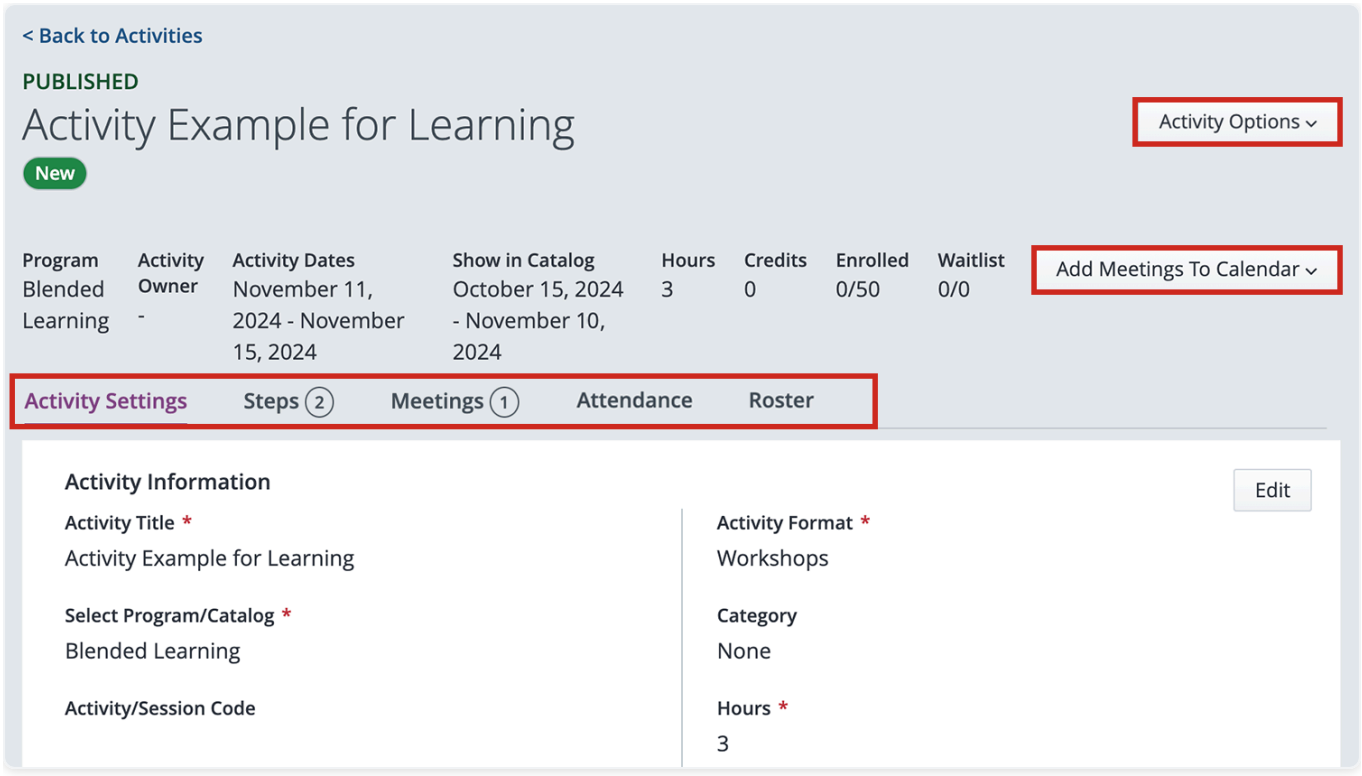
Editing Activities

Published activities can be managed from the Published tab on the Add/Edit Activities page. Select an activity link to review the activity details.



A selected Activity will include a series of options and tabs which host activity-related tasks.

- **Activity Options**: Preview Activity, Add/Edit Annotation, Cancel Activity, View Evaluation Results, and View Change Log.
- **Add Meetings to Calendar**: Add this activity to Google Calendar or Download the Calendar File.
- **Activity Settings, Steps, Meetings, Attendance, and/or Roster tabs**: Manage activity-related fields.



Additional Resources: Managing Activities as a Catalog Admin