

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:

- [Blended Learning](#)
- [Adding Activities](#)
- [Publishing Activities](#)
- [Editing Activities](#)

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.).

Add/Edit Activities

Create Activity

Published

Drafts

Archived

Date Range

07/01/2024 - 07/01/2025

Program

None

Purpose

None

Building

None

Course Code

None

Activity Format

None

Activity Category

None

Followups

None

Evaluation Methods

None

Event

None

Clear All

Q

Sort by Starting Date

Blended Learning Activity

03/21/2025 - 04/25/2025

Enrollment: 0 | Pending: 0 | Waitlist: 0

See More

Hours: 3

Credits: 0

Activity Steps: 2

Meetings: 1

Engaging Assessments

01/01/2025 - 05/30/2025

Owner : Allen Activity Owner

Enrollment: 2 | Pending: 0 | Waitlist: 0

See More

Hours: 4

Credits: 0

Activity Steps: 1

Meetings: 2

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**.

Add/Edit Activities

Create Activity ▾

Published

Drafts

Archived

Date Range

07/01/2024

–

07/01/2025

Program

None ▾

Purpose

None

Building

None ▾

Session Code

None ▾

Activity Form

None

Activity Category

None ▾

Followups

None ▾

Evaluation Method

None

Event

None ▾

Activity Name

Activity Example for Learning ×

Start Date ⓘ

10/30/2024

End Date

10/30/2024

Program

Blended Learning ▾

Cancel

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

Steps (0)

Meetings (0)

Attendance

Roster

Edit

Activity Information

Activity Title *

Activity Example for Learning

Select Program/Catalog *

Blended Learning

Activity/Session Code

Activity Description *

Activity Format *

None

Category

None

Hours *

0

Credits

0

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

Activity Title *

Activity Example for Learning

Select Program/Catalog *

Blended Learning

Activity/Session Code

Activity Description *

Normal Text B I U S P </> H1 H2 Q A ↺ ↻

Activity Format *

Select

Category

Select

Hours *

Credits

Cancel

Save as Draft

▼ 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	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.
End Date of Blended Learning	
Session(s)	Include one or more Zoom links or URLs, which are made visible following registration.

Session Dates and Information ⓘ

Start Date of Blended Learning Activity *

⚠ Start Date will be locked once registrations begin.

End Date of Blended Learning Activity *

⚠ Session(s)

Meeting creation has moved to the Meetings Tab.

Zoom Link or other Website (not visible before registration)

Zoom Link or other Website (visible before 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.

Catalog Viewing Options ⓘ

Start Showing On

10/14/2024



Stop Showing On



▼ 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.

Provider Information

Provider *

Select



If not on list, enter here

▼ Registration and Approval Settings Sections

This section allows you to manage registration and approval settings.

	<p>Determines the registration form for the activity. The dropdown lists available registration forms in your organization. Sample forms include:</p>
Process Registrations On*	<ul style="list-style-type: none">• In-District PD Request Form (no subs)• In-District PD Request Form (subs needed)• Online Content Registration Form
	<p>Determines registration approval options for the activity.</p> <p>No: Can register immediately w/ no approval. Yes: Needs approval in PLM to fully register.</p> <p>Note the following:</p>
Form Approval Required*	<ul style="list-style-type: none">• 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*	<p>Allows approvers with the Quick Approve permission to use a "one-click" approval without having to open the form.</p>

User Can Edit Form*

Allows learners to view and add information to the registration form, as needed.

Registration and Approval Settings

Process Registrations On *

Select



Form Approval Required *



Allow Quick Approval *



User Can Edit Form *



▼ 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.

Participants
Max Participants *

Min Participants

Max # Wait List

▼ Event Section

This section allows you to determine event affiliations.

Event this activity is part of

Select the event related to this activity.

Event

Event this activity is part of

Select



▼ 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 Resources [?](#)

Activity Evaluation

Select ▼

Enable Team Room Discussion

☐

Enable Team Room File Sharing

☐

Optional File(s)

Select File(s) ▼

▼ 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.

Activity Owner/Instructor(s) ⓘ

Activity Owner

Select ▼

Instructor(s)

Select Instructor(s) ▼

Instructors - Other

▼ 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

Purposes ?

Purpose(s) *

Select Purpose(s) ▼

▼ 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.

Goal(s) and Objective(s) ?

Select Objective(s) *

Select Objective(s) ▼

💡 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.

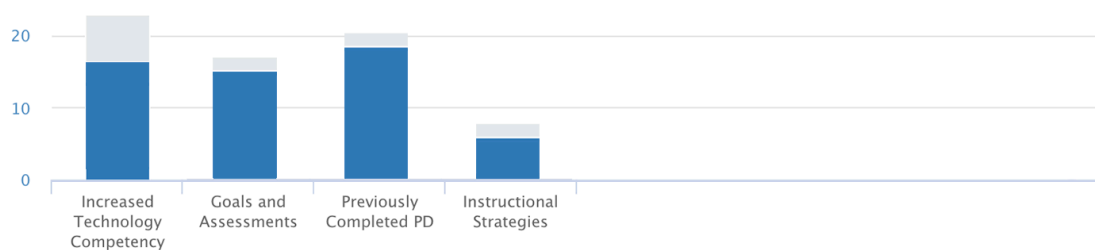
Goals

District Goals **8**

Building Goals **1**

Personal Goals **1**

4 My Activities **25** Available Activities **Activities aligned to multiple goals will appear* 



➤ 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.

Building(s) Restrictions ?

Restrict to users in these Building(s)

Select Building(s) ▼

Department(s) Restrictions ?

Restrict to users in these Departments

Select Department(s) ▼

Grade(s) Restrictions ?

Grade(s) Restrictions

Select Grade(s) ▼

Group(s) Restrictions

Group(s) Restrictions

Select Group(s) ▼



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.

The screenshot displays the 'Activity Steps' configuration window. At the top, there are tabs for 'Activity Settings', 'Steps' (with a circled '0'), 'Meetings' (with a circled '0'), 'Attendance', and 'Roster'. The 'Steps' tab is active. Below the tabs, the 'Activity Steps' section includes an '+ Add' dropdown and a toggle switch for 'Enforce Step Order for Participants' which is currently 'OFF'. A modal for 'Step 1' is open, showing a 'Resource' step type. It contains a 'Step Title' field with the text 'Resource Step Example', an 'Instructions' field with the text 'Please review the resource provided.', and a 'Choose Resource' button. The modal also has 'Cancel' and 'Save' buttons.

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.

Hide Filters
×

Grades
None

Subjects
None

Topics
None

Type
None

Licenses
None

323 Results
View Selection
Sort by **Relevance**

The Assessment Framework

⌚ 5:24

The Assessment Framework is built around desired learning results, purposes for assessment, and audiences for assessment. Jay has...

Select

Planned-For Assessments

⌚ 1:14

Planned-for assessments are determined prior to an interaction with students and include exit tickets, questioning strategies, and group...

Select

Assessment Literacy - Secondary

⌚ 10:06

Educators must become knowledgeable about the principles of sound assessment. A high school science teacher uses a variety of...

Select

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

Activity SettingsSteps 0Meetings 0AttendanceRoster

Activity StepsAdd OFF Enforce Step Order for Participants

▼ Step 1 - Untitled ResourceCancelSave

Resource

Step Title

Resource Step Example

Instructions

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-

-

 “ ” ↶ ↷ ↺

Please review the resource provided.



Assessment

Pre-test and post-test data helps plan tutoring for struggling readers. Word recognition lists are part of assessment for struggling readers. Passage reading is part of assessment for struggling readers. Accuracy and fluency are measured in assessment. Examples are shown of assessments of struggling readers. (1:13) Tutoring is proven to greatly help struggling readers. (3:20) Early intervention is essential to help struggling readers. Originally segment 5 of 9 in the Helping Struggling Readers Beyond Grade One series.

Generic Example

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

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.

[Activity Settings](#) [Steps 2](#) [Meetings 0](#) [Roster](#)

Activity Meetings [Add](#)

Cancel Save

Meeting Title	Date	Time		Location
Example Meeting ×	11/12/2024	08:00 AM	11:00 AM	Room 21A ×

Description

Normal Text **B** *I* U

Optional meeting description

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

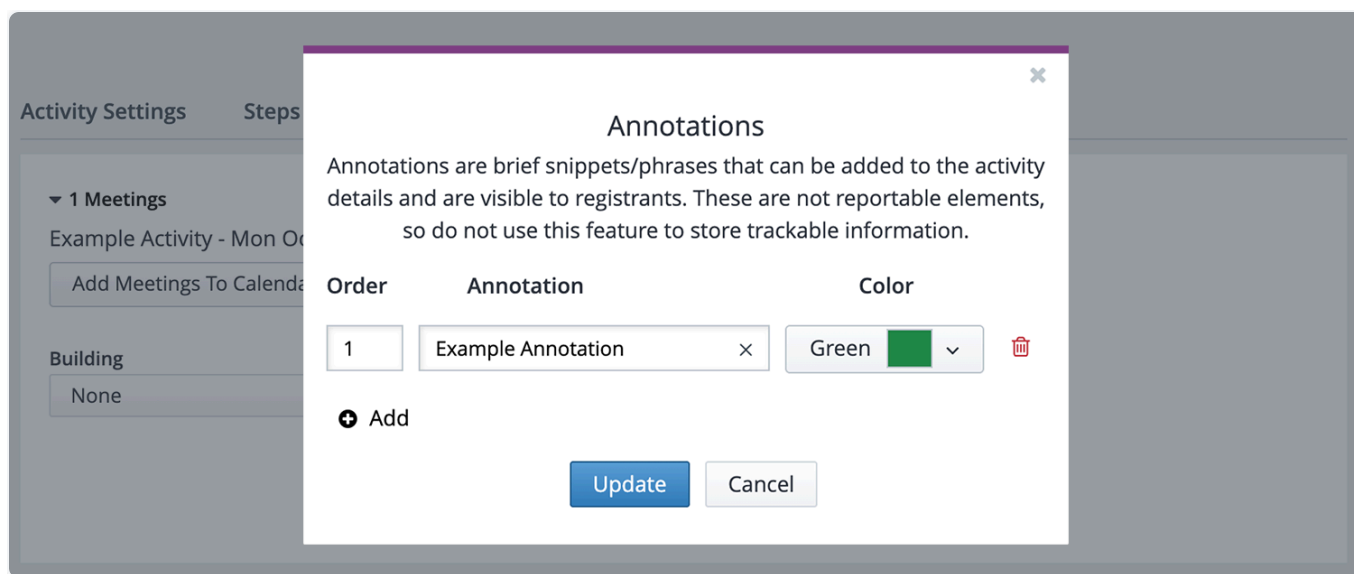
Roster Tab



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.

[< Back to Activities](#)

DRAFT

Activity Example for Learning

Activity Options ▾

Publish Activity

Program	Activity Owner	Activity Dates	Show in Catalog	Hours	Credits	Enrolled	Waitlist
Blended Learning	-	November 11, 2024 - November 15, 2024	October 15, 2024 - November 10, 2024	3	0	0/50	0/0

[Activity Settings](#)

Steps (2)

Meetings (1)

Attendance

Roster

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.

Published

Drafts

Archived

Date Range

07/01/2024  - 07/01/2025 

Program

None 

Purpose

None 

Building

None 

Session Code

None 

Activity Format

None 

Activity Category

None 

Followups

None 

Evaluation Methods

None 

Event

None 

Clear All 

Q Activity 

2 Activities

Sort by **Starting Date** 

Activity Example for Learning

11/11/2024 - 11/15/2024

Enrollment: 2 | Pending: 0 | Waitlist: 0

[See More](#) 

Hours: 3

Credits: 0

Activity Steps: 2

Meetings: 1 

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.

[< Back to Activities](#)

PUBLISHED

Activity Example for Learning

New

Activity Options ▾

Program	Activity Owner	Activity Dates	Show in Catalog	Hours	Credits	Enrolled	Waitlist
Blended Learning	-	November 11, 2024 - November 15, 2024	October 15, 2024 - November 10, 2024	3	0	0/50	0/0

Add Meetings To Calendar ▾

- Activity Settings
- Steps ②
- Meetings ①
- Attendance
- Roster

Activity Information

Edit

Activity Title *
Activity Example for Learning

Select Program/Catalog *
Blended Learning

Activity/Session Code

Activity Format *
Workshops

Category
None

Hours *
3

Additional Resources: [Managing Activities as a Catalog Admin](#)