

Managing Activities as an Instructor

This article explains Activity functionality for Instructors with the [Blended Learning release](#). Focus areas include permission/visibility options, navigation, activity management, and other important settings.

Click a hyperlink below to jump to that topic:

- [Blended Learning](#)
- [Instructor Tools](#)
- [Managing Activities](#)

💡 Quick Navigation Tips:

- ➡ Go to Attendance tab to view and take attendance.
- ➡ Go to Roster tab to add/manage participants or update an enrollment status.

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 Instructors to access the options mentioned below. Please reach out to your Organization Administrator if you experience visibility restrictions or require assistance.

Permissions	Actions	Access
Meeting Management	✓ Can mark attendance	📅 Attendance tab

Permissions	Actions	Access
*Register	✓ Can add participants	Attendance and Roster tab



The ability to add participants through Register is an additional permission that may be granted, based on your organization's processes. Check with your PLM Organization Admin for questions.

Instructor Tools

Access the Instructor Tools option in your application's side navigation to manage activities.



Access & Visibility: Only activities for which you are listed as an instructor will appear.

Navigation:

Activities

Instructor Tools

The Published tab opens by default. From here, you will see a list of activities for which you are listed as an instructor. The page also includes an Archived tab, which will host archived activities.

Use the filter options to narrow activity results (e.g., Date Range, Program, Building, Activity Format, etc.).

Select an existing activity link from the list to manage the activity's meeting and roster details.

Instructor Tools

Published

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 ✕

Search by title or session coc

2 Activities

Sort by **Starting Date** ▾

Activity Example

02/27/2025 - 03/14/2025

Instructors : Samantha Instructor

Enrollment: 5 | Pending: 0 | Waitlist: 0

[See More](#) ▾

Hours: 7

Credits: 0

Activity Steps: 2

Meetings: 2

Managing Activities

Once an activity is selected, you will see a series of sub-tabs: Activity Settings, Steps, Meetings, Attendance, and Roster. Access to these options will depend on your permissions.

[< Back to Activities](#)

PUBLISHED

Activity Example

Activity Options ▾

Program	Activity Owner	Instructor	Activity Dates	Show in Catalog	Hours	Credits	Enrolled	Waitlist
Blended Learning	-	Samantha Instructor	February 27, 2025 - March 14, 2025	February 26, 2025 - March 13, 2025	7	0	5/20	0/0

Activity Settings

Steps (2)

Meetings (2)

Attendance (1)

Roster

Click a tab below to walk through each tab.

Activity Settings

Activity Settings Tab

This tab shows activity details, as configured by a Catalog Administrator, such as the activity start and stop dates, catalog visibility dates, and any associated files. Information on this tab is **view-only**.

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



Fields may vary based on configuration. Reach out to your PLM Org Admin with questions.

▼ Activity Information Section

This section indicates 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*	Indicates 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 Format *
Activity Example	College Courses
Select Program/Catalog *	Category
Blended Learning	None
Activity/Session Code	Hours *
	8
Activity Description *	Credits
Activity Example	0

▼ **Participants Section**

This section indicates 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.

Participants	
Max Participants *	
10	
Min Participants	
0	
Max # Wait List	
0	

▼ Activity Resources Section

This section indicates *activity*-specific evaluations, in addition to your *form*-specific evaluation.

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

Activity Resources ?

Activity Evaluation

None

Enable Team Room Discussion

No

Enable Team Room File Sharing

No

Optional File(s)

Go to Steps Tab

Steps

Steps Tab

Activity steps can be viewed, as needed, via the Steps tab. Information will include the step name, whether it is a resource or text type, and relevant details (such as a resource link, handout, etc.).

Activity Settings

Steps 2

Meetings 2

Attendance 1

Roster

Activity Steps

▼ Step 1 - Healthy Habits Posters

 Resource

Instructions:

Find posters to promote healthy habits to combat stress.

 Healthy Habits Posters

► Step 2 - Laying the Foundation for Emotional Intelligence

 Resource

[Go to Meetings Tab](#)

Meetings

Meetings Tab

The Meetings tab allows you to view the meetings associated with an activity. The number of meetings will appear to the right of the tab within the activity.

To view any canceled meeting(s), select the checkbox beside Show Canceled.

Activity Settings

Steps 2

Meetings 2

Attendance 1

Roster

Activity Meetings

+ Add

☐ Show Canceled

Intro

Edit

Meeting Title	Date	Time	Location
Intro	02/27/2025	9:00 AM - 10:00 AM	Library
Description			
Introduction to healthy habits			

Habits Discussion

Edit

Go to Attendance Tab

Attendance

Attendance Tab

The Attendance tab is where you can take or review attendance, print sign-in sheets, or add participants.

Options	
Add Meetings to Calendar	Add this activity to Google Calendar or Download the Calendar File.
Print Sign-in Sheet	Print all or single meeting dates. Select from provided options or add custom entries.

Options

Manage Attendance

Enter/adjust the attendees' hours/credits (or mark as attended/absent).

Show Canceled

Check to show canceled meeting dates grayed out in your view.

Add Participants

Requires a role with the Register permission. See [Adding Participants to an Activity](#).

Activity Settings

Steps ②

Meetings ②

Attendance ①

Roster

ⓘ Please confirm that you have reviewed attendance.

Review Complete

▼ 2 Meetings

Intro - Thu February 27, 2025 09:00 AM to 10:00 AM - Library

Habits Discussion - Fri February 28, 2025 10:00 AM to 11:00 AM - Library

Add Meetings To Calendar ▼

Building

None ▼

Department

None ▼

Bulk Mark Attendance

Find Participants

5 Participants

Show Canceled

Print Sign-in Sheet

Add Participants ▼

☐	Name ▲	Comments	Feb 27	Feb 28
☐	Allen, Barry Elementary School ⓘ	<input type="text" value="You may leave a comment"/>	<input type="text" value="1"/> ×	<input type="text" value="1"/> ×
☐	Learner, Lee Extra Elementary	<input type="text" value="You may leave a comment"/>	<input type="text" value="1"/> ×	<input type="text" value="1"/> ×
☐	Learner, Leon Extra Elementary	<input type="text" value="You may leave a comment"/>	<input type="text" value="1"/> ×	<input type="text" value="1"/> ×
☐	Learner, Lora Extra Elementary	<input type="text" value="You may leave a comment"/>	<input type="text" value="1"/> ×	<input type="text" value="1"/> ×
☐	Principal, Polly Extra Elementary	<input type="text" value="You may leave a comment"/>	<input type="text" value="1"/> ×	<input type="text" value="1"/> ×

Review/Update Attendance

Use the filters and search option above the attendee list to narrow attendee results.

The attendee list will include Name, Comments, and Dates. Hours can be adjusted individually or in bulk. These hours will be awarded to users upon completion of the activity.

For single adjustments, enter an individual attendee's hours/credits in the text box. The system will auto-save your entry.

Building
None

Department
None

Bulk Mark Attendance

5 Participants

☐ Show Canceled

Print Sign-in Sheet

Add Participants

☐	Name ^	Comments	Feb 27	Feb 28
☐	Allen, Barry Elementary School ⓘ	<input type="text" value="You may leave a comment"/>	<div>1</div> <div>×</div>	<div>1</div> <div>×</div>
☐	Learner, Lee Extra Elementary	<input type="text" value="You may leave a comment"/>	<div>1</div> <div>×</div>	<div>1</div> <div>×</div>
☐	Learner, Leon Extra Elementary	<input type="text" value="You may leave a comment"/>	<div>1</div> <div>×</div>	<div>1</div> <div>×</div>
☐	Learner, Lora Extra Elementary	<input type="text" value="You may leave a comment"/>	<div>1</div> <div>×</div>	<div>1</div> <div>×</div>
☐	Principal, Polly Extra Elementary	<input type="text" value="You may leave a comment"/>	<div>1</div> <div>×</div>	<div>1</div> <div>×</div>

Select multiple users and click **Bulk Mark Attendance**. By default, the Meeting Date(s) dropdown is set to All meeting dates; select specific dates, if needed. Enter the meeting duration; then, click **Apply Changes** to save.

Building

Department

None

None

2 selected Mark Attendance

Meeting Date(s)

Hours

Cancel

Apply Changes

All

Q Type here to filter

Feb 27 09:00AM - 10:00AM

Feb 28 10:00AM - 11:00AM

Select All

Clear All

Name		Feb 27	Feb 28
☒ Allen, Barry Elementary School ⓘ		1	1
☒ Learner, Lee Extra Elementary	<div>You may leave a comment</div>	1	1
☐ Learner, Leon Extra Elementary	<div>You may leave a comment</div>	1	1

Confirm Attendance

Once attendance has been reviewed and adjusted (if needed), select the **Review Complete** button to confirm.



The Review Complete button will not appear until *after* the meeting date(s). For activities with multiple meetings, only select this option once attendance has been reviewed and updated for *all* meetings.

Activity Settings

Steps 2

Meetings 2

Attendance 1

Roster

ⓘ Please confirm that you have reviewed attendance.

Review Complete

▼ 2 Meetings

Intro - Thu February 27, 2025 09:00 AM to 10:00 AM - Library

Habits Discussion - Fri February 28, 2025 10:00 AM to 11:00 AM - Library

Add Meetings To Calendar

The Attendance tab will display a ✓ checkmark to indicate that attendance has been completed.

Go to Roster Tab

Roster

Roster Tab

Use the filters at the top of the page to narrow roster results (Building, Status, etc.), and select the  Gear icon beside the results list to adjust what configuration appears in your roster view (Name, Step Status, Evaluation Status, Comments, etc.).

Activity SettingsSteps (2)Meetings (2)Attendance ✓Roster

Building
None

Department
None

Grade
None

Group
None

Status
None

Activity Enrollment
All

Apply Filters

Find Participant5

Approval Status ⓘ

Step Status

Comments ⌵

Awarded ⌵ Hours

⚙️ ⌵

Allen, Barry	Instructor Confirmed	0% <div></div> ⓘ		0.0	
Learner, Lee	Instructor Confirmed	0% <div></div> ⓘ		0.0	

Those with the Register permission can add participants via the Roster tab.

Add Participants

To add activity participants, click the **Add Participants** dropdown This includes options for adding participants one-at-a-time or in bulk, as well as an import option.

Add Participants ▾			
Find Participant	5	Approval Status ⓘ	Step Status
Allen, Barry	Instructor Confirmed	0%	ⓘ

Quick Add
 Search All Staff
 Import



Adding participants on the Roster tab requires the "Register" permission. Please reach out to your Organization Administrator if you require assistance.

Add Participants

Quick Add

- Search by name, email, or Employee ID for single results.
- Set Enrollment Status.

Search unenrolled staff by Name, Email or Staff ID

Set Enrollment Status

None ▾

Add to Roster

Search All Staff

- Add participants in bulk by Building, Department, Group, etc.
- Set Enrollment Status.

Search All Staff

First Name
 Last Name
 Staff ID
 Email Address

Building

None ▾

 Department

None ▾

 Grade

None ▾

 Group

None ▾

Show selected ☐

Search

☐ Name
 ☐ Email
 ☐ Staff ID

Select the Search button to display all unenrolled users or use the filters to refine your results

Set Enrollment Status

None ▾

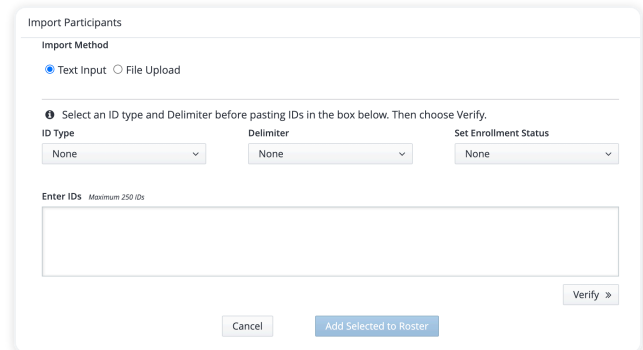
Cancel

Add Selected Users

Add Participants

Import

- Use text import or file upload.
- Select an ID Type (Staff ID or Email), Delimiter (comma or semicolon), and Enrollment Status before pasting IDs.
- Verify.
- Add Selected to Roster.

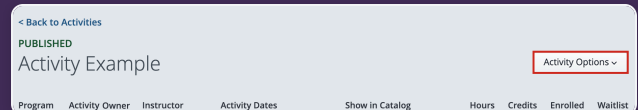


The 'Import Participants' dialog box shows the 'Import Method' section with 'Text Input' selected. Below, there are three dropdown menus for 'ID Type' (set to 'None'), 'Delimiter' (set to 'None'), and 'Set Enrollment Status' (set to 'None'). A text area labeled 'Enter IDs' with a 'Maximum 250 IDs' limit is provided. At the bottom, there are 'Cancel', 'Add Selected to Roster', and 'Verify »' buttons.



As you work within an activity, use the tabs to navigate through activity information or select the breadcrumbs at the top of the activity to return to Instructor Tools.

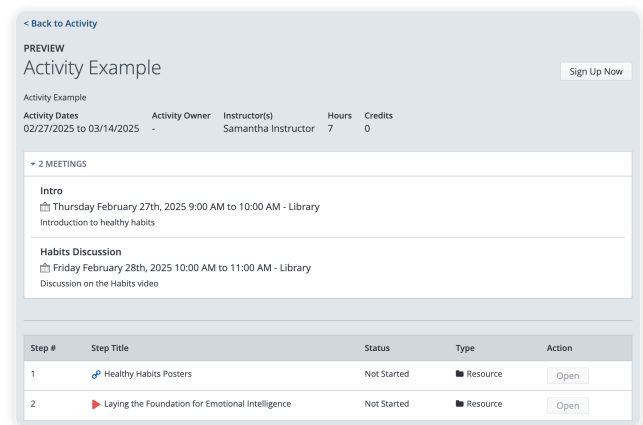
Activity Options Dropdown (Top Right of Activity Page)



The screenshot shows the top right of an activity page. A red box highlights the 'Activity Options' dropdown menu. Below it, a navigation bar contains tabs for 'Program', 'Activity Owner', 'Instructor', 'Activity Dates', 'Show in Catalog', 'Hours', 'Credits', 'Enrolled', and 'Waitlist'.

Preview Activity

Review how the activity appears in the Catalog when a learner registers for the activity.



The 'Activity Preview' interface shows details for 'Activity Example'. It includes a 'Sign Up Now' button, activity dates (02/27/2025 to 03/14/2025), owner (Samantha), instructor (Samantha), hours (7), and credits (0). A section titled '2 MEETINGS' lists two sessions: 'Intro' on Thursday, February 27th, 2025, and 'Habits Discussion' on Friday, February 28th, 2025. Below this is a table with two steps.

Step #	Step Title	Status	Type	Action
1	Healthy Habits Posters	Not Started	Resource	Open
2	Laying the Foundation for Emotional Intelligence	Not Started	Resource	Open

Activity Options Dropdown (Top Right of Activity Page)

[< Back to Activities](#)

PUBLISHED

Activity Example

Activity Options ▾

Program

Activity Owner

Instructor

Activity Dates

Show in Catalog

Hours

Credits

Enrolled

Waitlist

Evaluation Results

View results and completion status of a required evaluation assigned to the activity.

▼ Instructor Tools

▼ Activity Details

Activity Example

Program: Blended Learning

Dates: 2/27/2025 to 3/14/2025

▼ 2 Meeting(s)

Hours: 7 | Enrolled: 5/20 | Wait: 0/0

► Actions