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:

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.

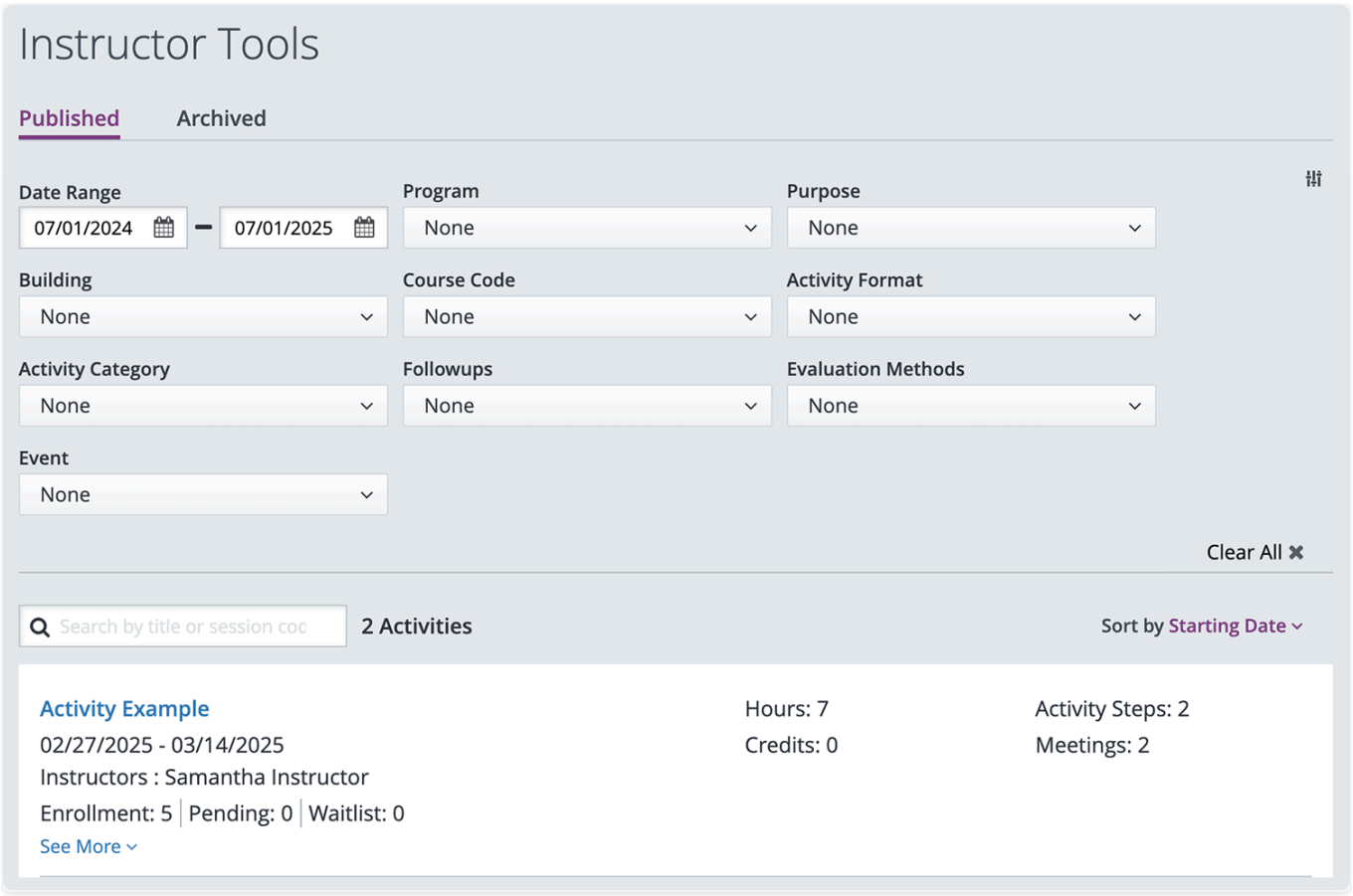
Access & Visibility: Only activities for which you are listed as an instructor will appear.

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.

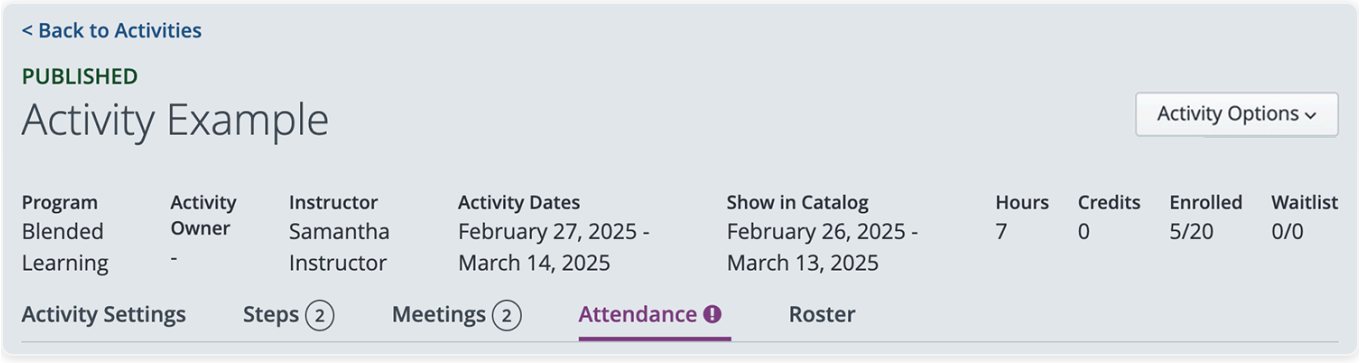
Use the filter options to narrow activity results (e.g., Date Range, Program, Building, Activity Format, etc.).

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



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.



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**.

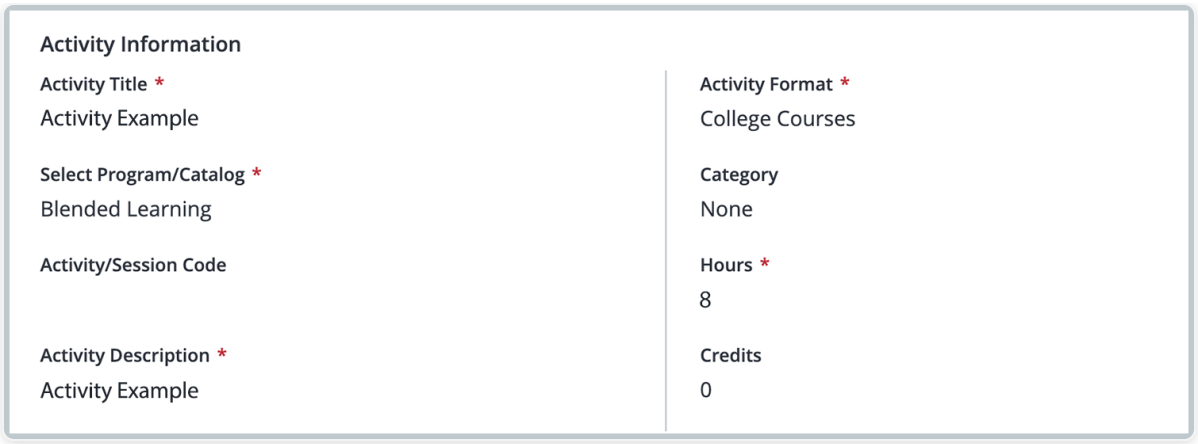
Select the following dropdowns to better understand each section of an Activity Profile form.

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.

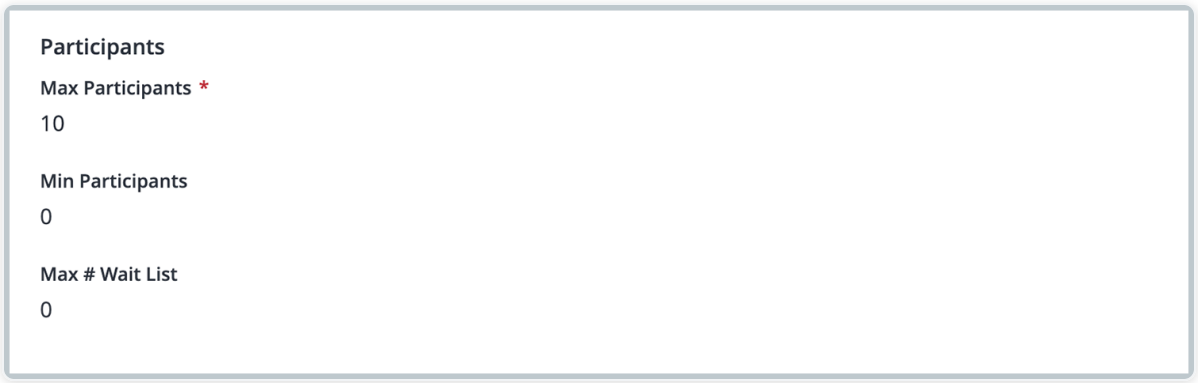
Activity Title*	Name of activity that appears in catalog, portfolios and reporting.
Select Program/Catalog*	Indicates the selection made during the initial Activity creation step.
Activity/Session Code	Indicates the code used for this activity.
Activity Description*	Details about the activity, such as 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.



Participants Section

This section indicates participant parameters for the activity.

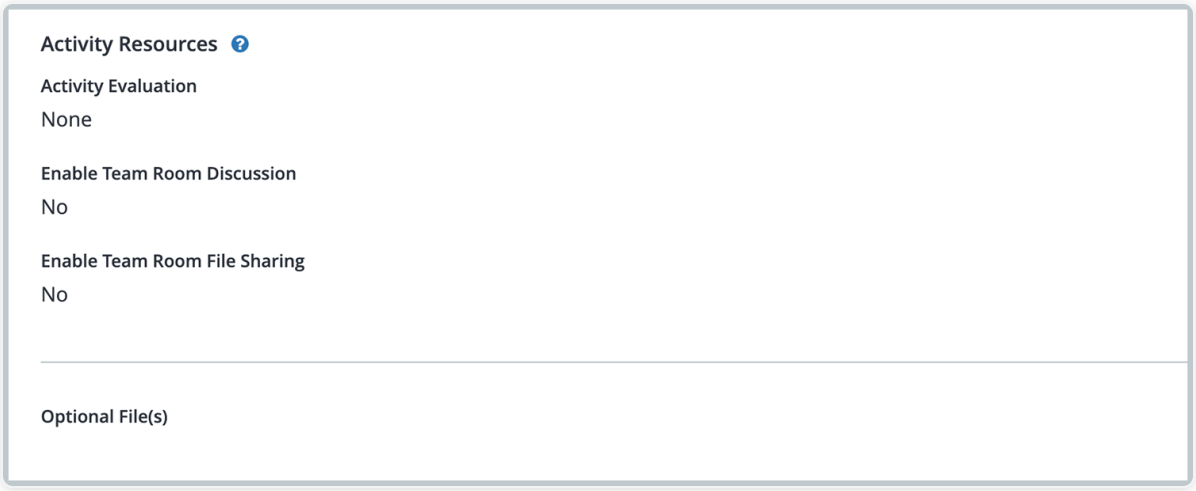
Max Participants*	Upper limit for registration; activity registration will close once reached.
Min Participants	Optional field for information/reporting purposes.
Max # Wait List	Total allowed on wait list for full activities. When selected, PLM automatically adds learners from the wait list as registrants drop the course.



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.

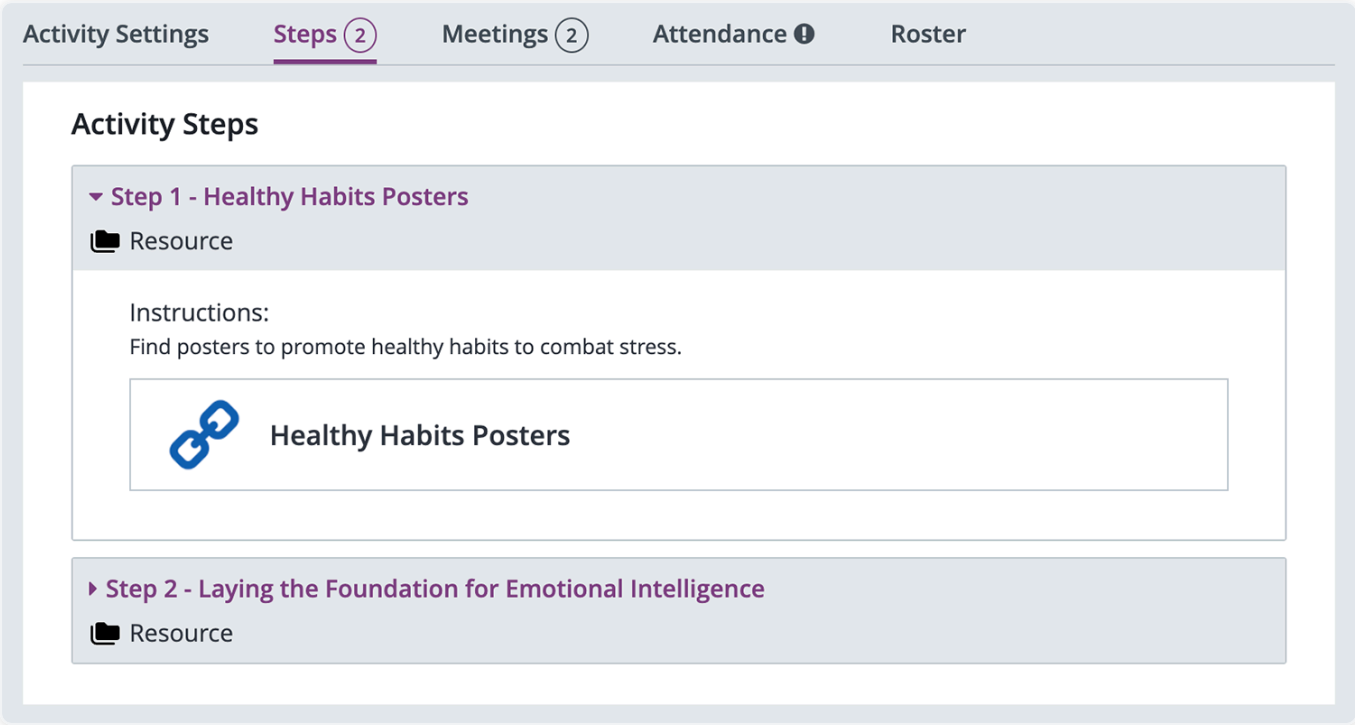


Go to Steps Tab

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.).



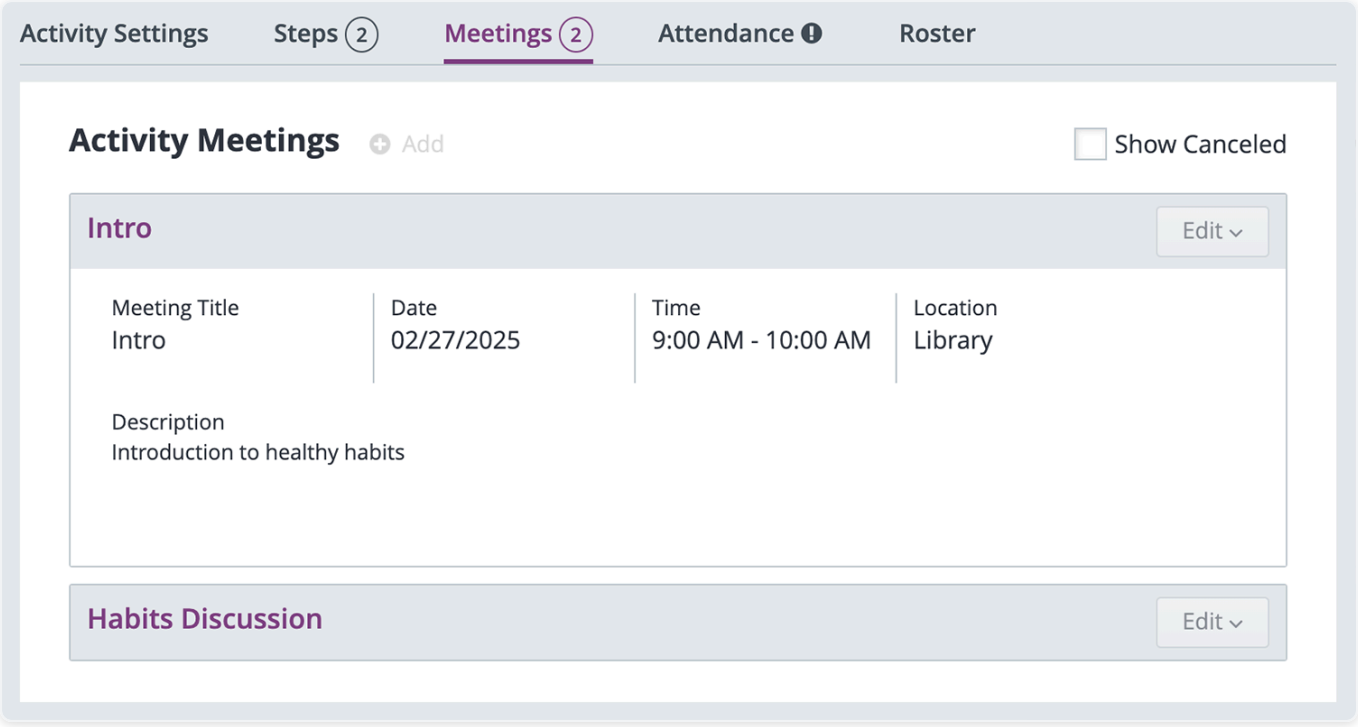
Go to Meetings Tab

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.



Go to Attendance Tab

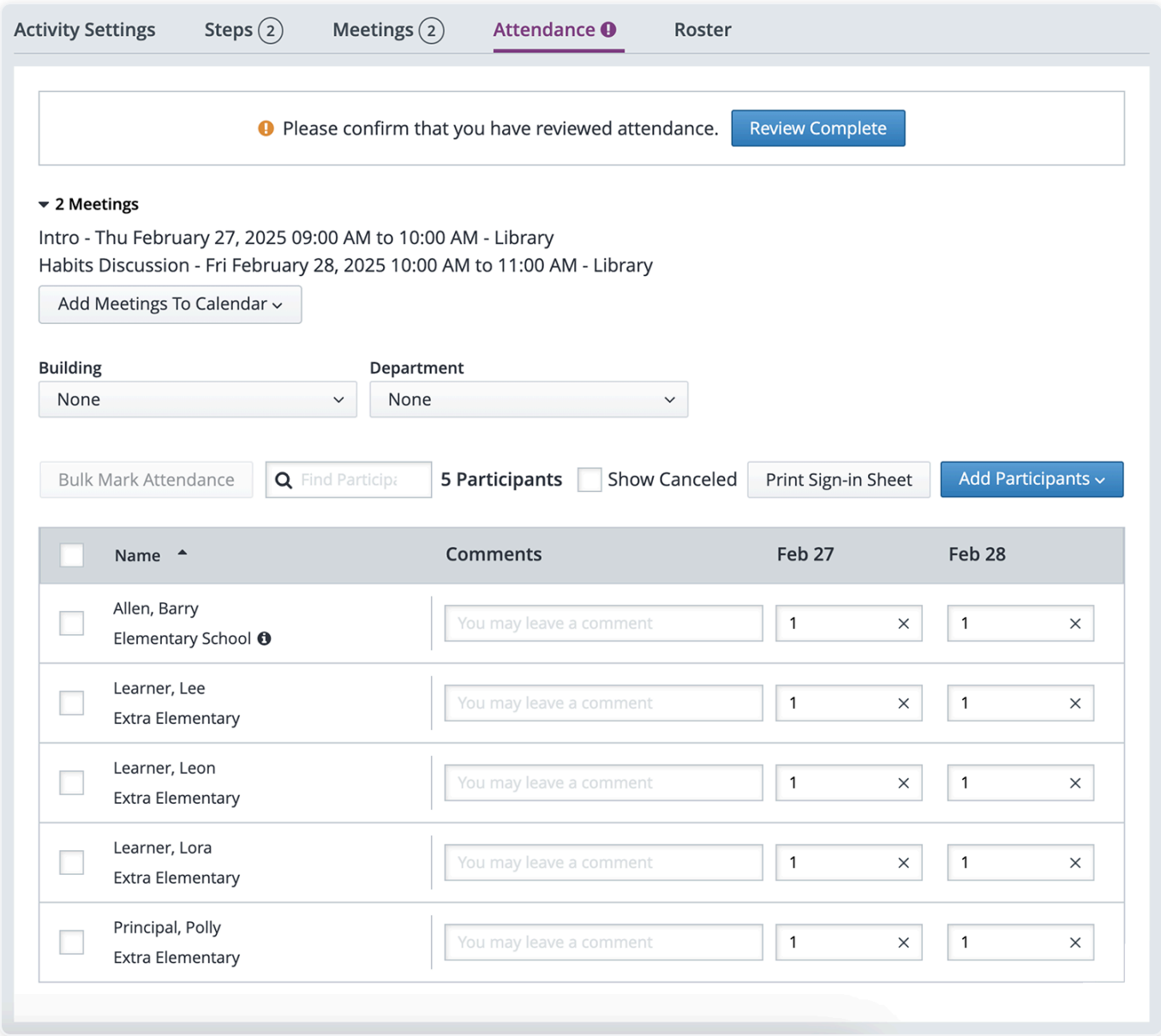
Attendance

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.

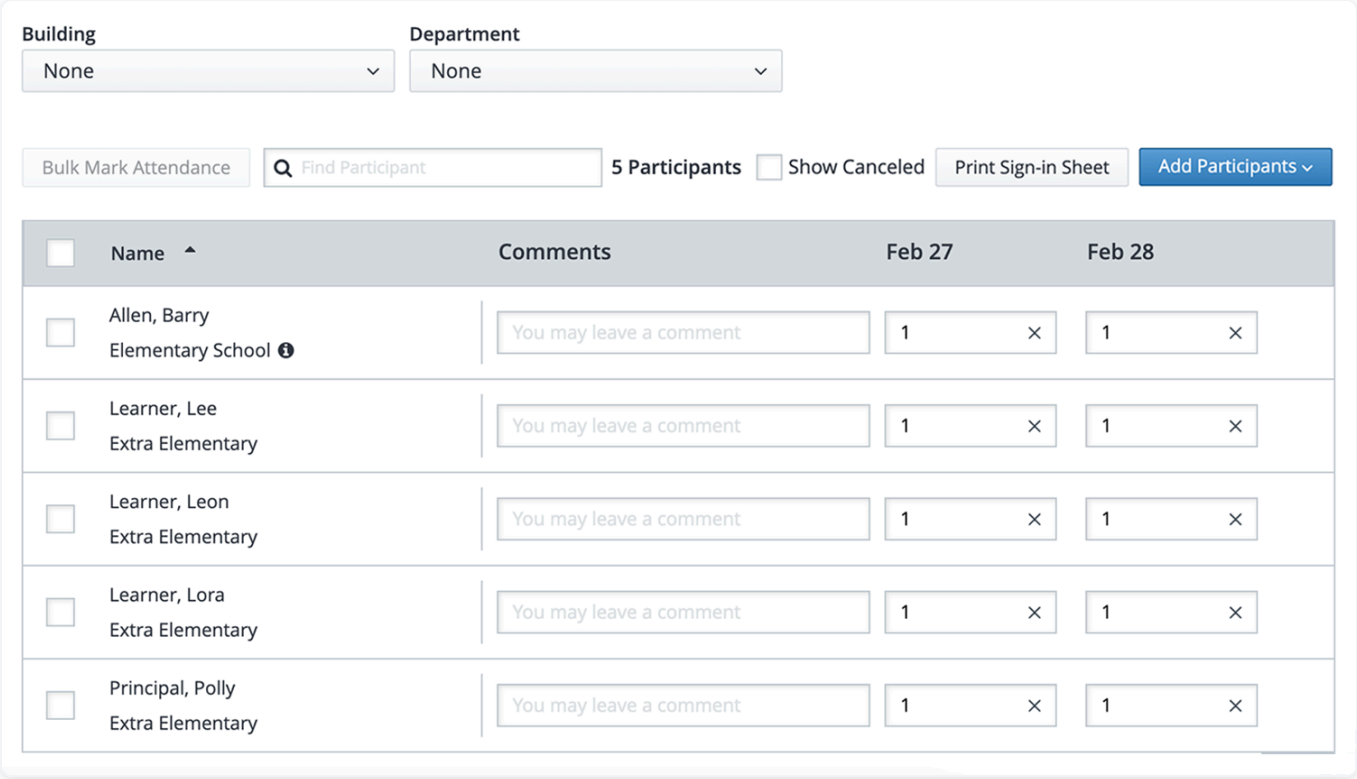


Review/Update Attendance

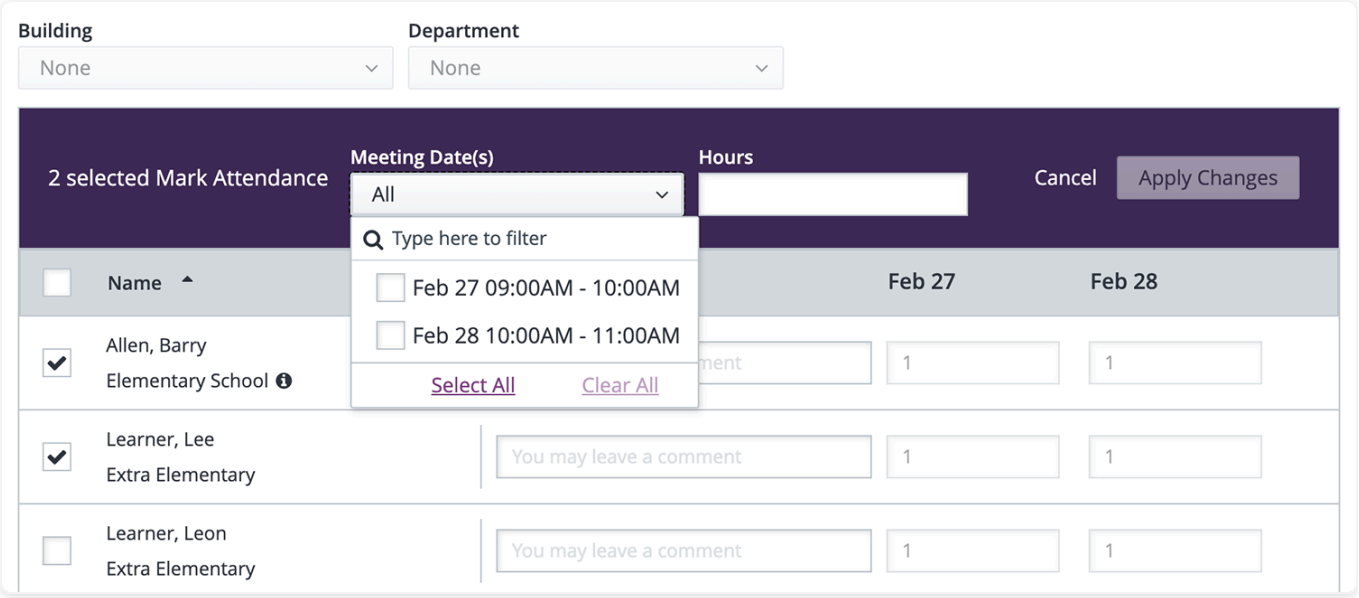
Use the filters and search option above the attendee list to narrow attendee results.

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.



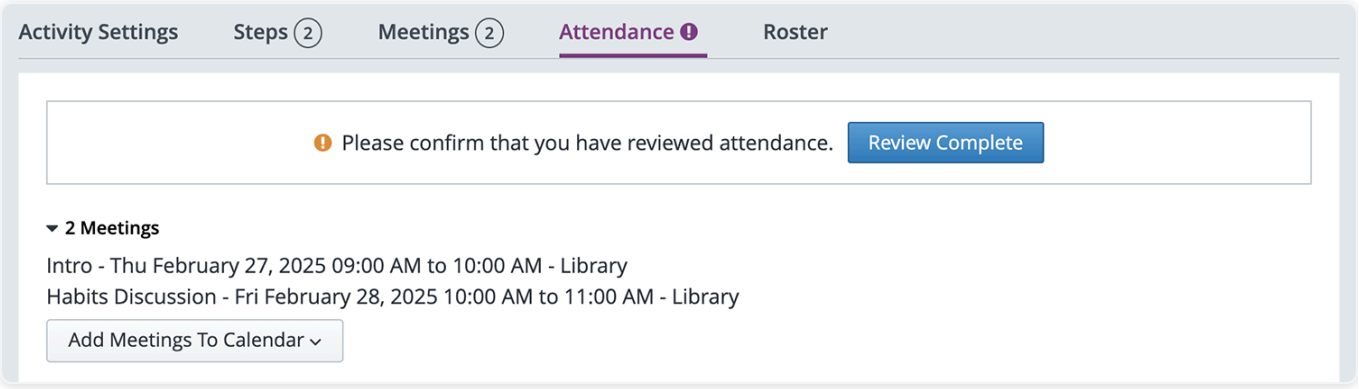
Select multiple users and click **Bulk Mark Attendance**. By default, the Meeting Date(s) dropdown is set to All meeting dates; select specific dates, if needed. Enter the meeting duration; then, click **Apply Changes** to save.



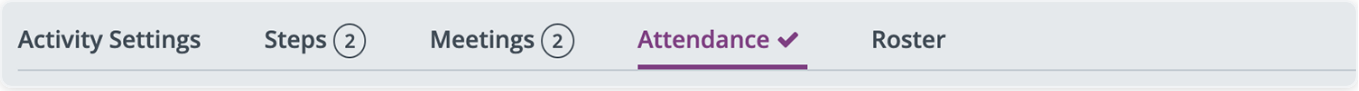
Confirm Attendance

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.



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

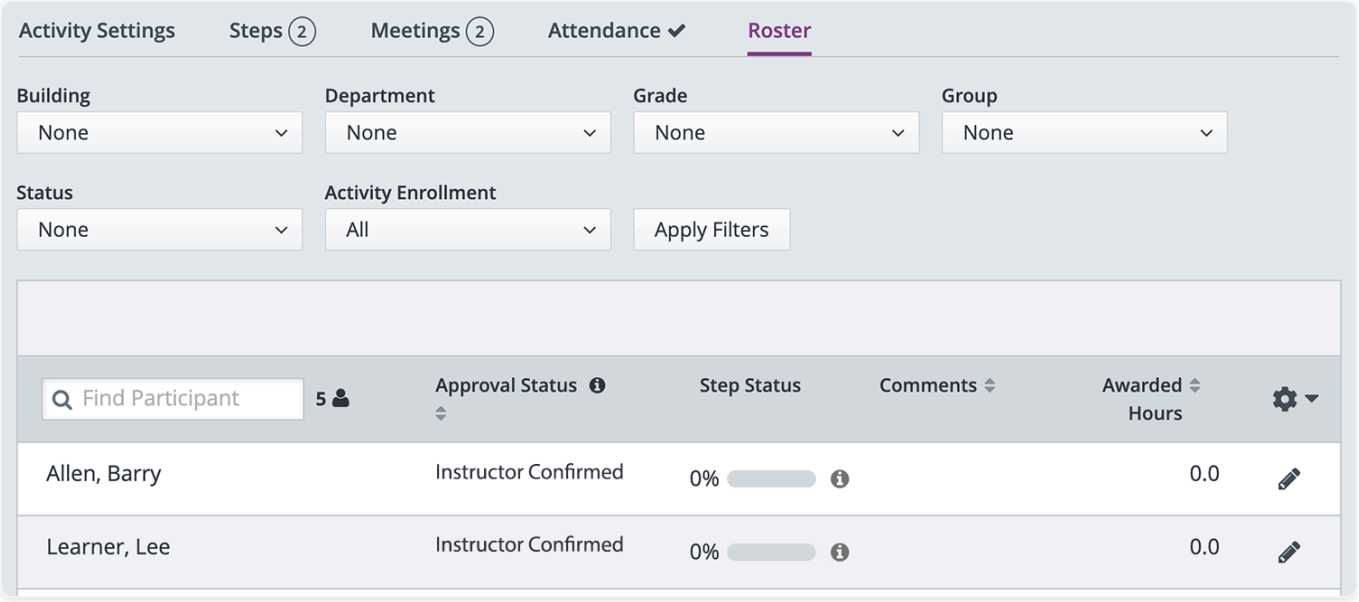


Go to Roster Tab

Roster

Roster Tab

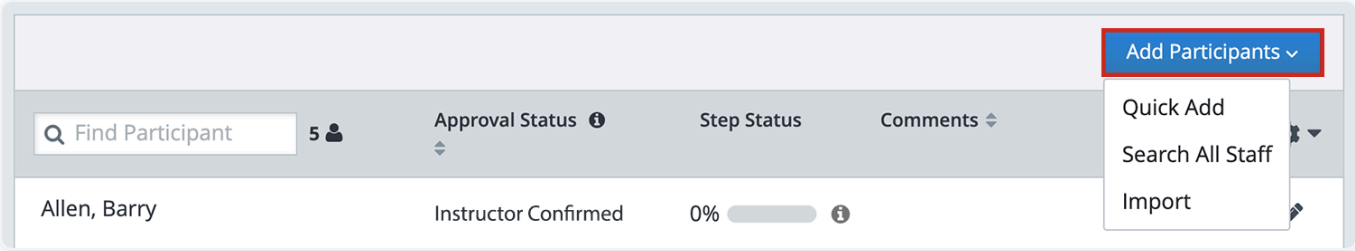
Use the filters at the top of the page to narrow roster results (Building, Status, etc.), and select the ⚙ Gear icon beside the results list to adjust what configuration appears in your roster view (Name, Step Status, Evaluation Status, Comments, etc.).



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.

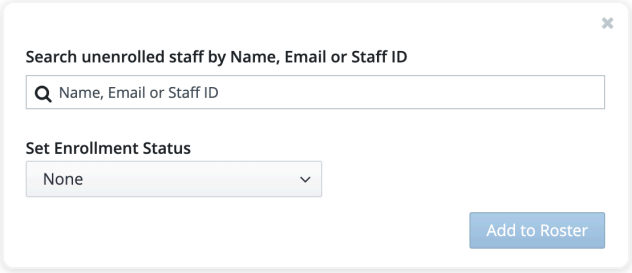


Adding participants on the Roster tab requires the "Register" permission. Please reach out to your Organization Administrator if you require assistance.

Add Participants

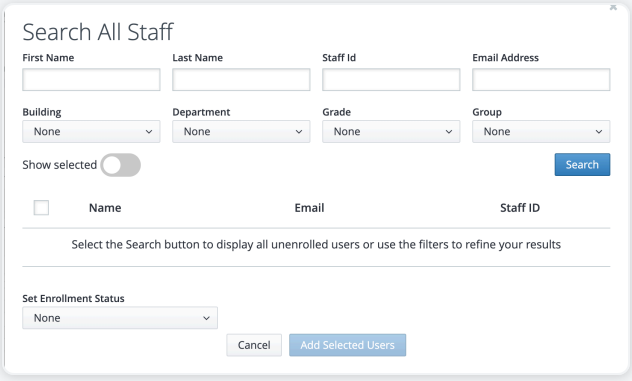
Quick Add

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



Search All Staff

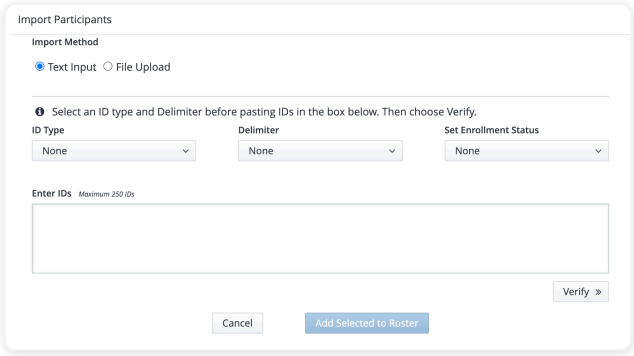
- Add participants in bulk by Building, Department, Group, etc.
- Set Enrollment Status.



Add Participants

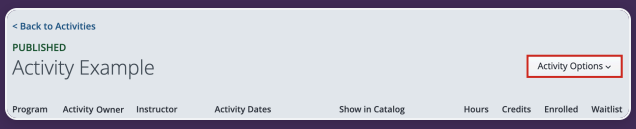
Import

- 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.



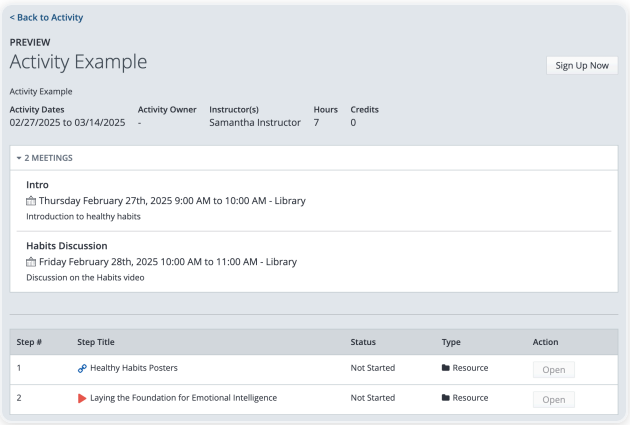
As you work within an activity, use the tabs to navigate through activity information or select the breadcrumbs at the top of the activity to return to Instructor Tools.

Activity Options Dropdown (Top Right of Activity Page)



Preview Activity

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



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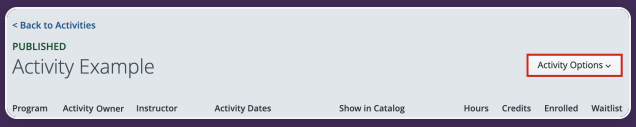

Evaluation Results

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