Instructor Portal Quick Reference Guide

This quick reference guide provides streamlined instructions for managing your class. For more detailed instructions, see the comprehensive guide below.

Accessing the Class Management Screen

All Instructor activities can be performed via the Product Info popup menu, which is accessible through the Class Management Screen using either the Calendar or Grid view.

Step 1: Log in to the OLLI-UA Website and select the Class Management menu item within the Instructor Portal menu.

Step 2: Access the Product Info popup menu.

If you are using the grid view, click on the More Info button and the Product Info popup will appear. If you are using the calendar view, click on any session of your class to accomplish the same.

Note: The Class Management Screen defaults to the Grid View. Use the green buttons on the top right of the grid/calendar to toggle between the views:
Emailing Your Class

Emailing your class is managed via the Notes section of the Product Info popup menu.

Step 1: Click on the Notes button on the Product Info popup.

The following popup will appear:

Step 2: Click the email link.
This will open an email addressed to your class via your default email program:

Your screen may look different than pictured below depending on the email program you use.

Note that the email **must** come from the email address you use for your OLLI-UA login. You can also copy/paste the email address into your own email program if the link above does not work for you.

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**Step 3:** Write your email as you normally would. Then, click send.

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Hello class,

Here are the notes for our first session. Please read them before class.

Thanks!

All best,

*Katherine Schumann*  
Program Coordinator

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A Note on Emails

How to Send

To send an email to your students is just as easy as sending an email from your own computer. When you send an email it goes out in a broadcast email to anyone registered in your class. They will only see the email as coming from you. Students can then reply directly to you. You should also get a copy of the email to show it went out.

Email Recipients

The email system may not always have the most up to date list of registered students. We will be updating these lists regularly, but keep in mind many students are adding and dropping classes in the first few weeks and not all will receive your messages. Our office will be staying on top of this but we wanted you to be aware.

Email Subject

Class emails are configured to automatically add the class name in front of your subject. Example: If you teach Economics for Dummies and you put a subject in your email of “Welcome to Class”. The receiver will see Subject: Economics for Dummies: Welcome to Class.

Best Practices

Email systems struggle these days with many deliverability issues. The more complex your messages are to students (adding attachments, numerous web links and the like) the more issues you will have with email getting blocked or filtered as Junk and SPAM in inboxes. We continue to look for solutions to aid in getting communications through but in the meantime keep in mind, simple text based messages will give you the highest deliverability.

Attachments

This new system will allow attachments however we encourage you to use them as sparingly as possible (see best practices above) and keep the size of attachments to a minimum. You will not be able to send a message that has attachments greater than 7 MB or it will kick back as undeliverable.

Please Use OLLI-UA Email Responsibly.

Remember, OLLI-UA email is intended only for official communications from instructors to participants for the purposes of class instruction and administration. Student contact information is to be kept confidential and not used or kept for any other purpose.
Accessing Your Roster Quick Guide

Whether you are accessing your roster via the Calendar View or the Grid View, the easiest way to do so is via the Reports section.

Step 1: Click the Reports button on the Product Info popup menu.

Step 2: Use the Legacy Product Reports section at the bottom to access your roster and/or waiting list.

To view your roster, check the box next to the Class Roster and Simple Sign-In option.

To view your waiting list, check the box next to the Wait List Staff Report option.

Or, you can check both boxes to view the reports at the same time.
Instructor Portal Comprehensive Guide

This comprehensive guide provides complete instructions for managing your class. For a quick reference guide, see the document above.

Navigating the Instructor Portal

Step 1: Log in to the OLLI-UA website and navigate to the Instructor Portal tab.*

*If you are a member of OLLI-UA, your Instructor login will be the same as your member login.

Step 2: Click on the Class Management menu item.
Your OLLI-UA Class Management Screen

From here you can see your upcoming class schedule, assigned classes, enrollments, run a class roster, and access a link to your dedicated class email.

There are two views - a calendar view and the grid view. The grid view offers the fastest way to access most general reporting needs. The grid only shows currently active classes. The calendar will show all classes past and present.

Click here for detailed instructions.

<table>
<thead>
<tr>
<th>Start Date</th>
<th>Start Time</th>
<th>Name</th>
<th># Reg</th>
<th># Wait List</th>
<th>Campus</th>
<th>Location</th>
<th>Weeks</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>9/19/2019</td>
<td>9:00 AM</td>
<td>Understanding China</td>
<td>73</td>
<td>0</td>
<td>Central Tucson Campus</td>
<td>Ocotillo Room</td>
<td>10</td>
<td>11/21/2019</td>
</tr>
<tr>
<td>9/30/2019</td>
<td>9:00 AM</td>
<td>Understanding China Today</td>
<td>43</td>
<td>0</td>
<td>Green Valley Campus</td>
<td>Community Learning Center - Room 205</td>
<td>8</td>
<td>11/18/2019</td>
</tr>
</tbody>
</table>

The grid view pictured above offers a handy snapshot of key information for all the classes you are teaching: Start Date, Start Time, Class Name, # Registered Students, # Waitlisted Students, Campus, Location, Weeks, End Date.

Note that if you have multiple classes, you can change the sort order by clicking any of the column headers above.
In addition to the grid view (pictured above) you can also access a calendar view by clicking on the green calendar button:

![Staff Calendar](image.jpg)

- **Calendar Navigation Buttons**
- **Month/Week/Day Calendar View**
- **Calendar/Grid Buttons**

### Staff Calendar

<table>
<thead>
<tr>
<th>View Options</th>
<th>October 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sunday</td>
<td>Monday</td>
</tr>
<tr>
<td>29</td>
<td>30</td>
</tr>
<tr>
<td>6</td>
<td>7</td>
</tr>
<tr>
<td>13</td>
<td>14</td>
</tr>
<tr>
<td>20</td>
<td>21</td>
</tr>
</tbody>
</table>

**Staff Calendar Components – Click to Toggle On/Off**

- Assigned Staff Events
- Staff Unavailability Calendar

**Class Sessions**

- Understanding China Today
- Understanding China
- Understanding China
- Understanding China
If you don’t see your classes on the calendar, double check that the “Assigned Staff Events” button is toggled on:

Note that if it is toggled on, it will appear as a filled blue box. If it is toggled off, it will appear as an outlined blue box, similar to the Staff Unavailability Calendar button below.

You can manage your class using either the Calendar View or the Grid View. Whichever method you use is up to you!
Managing Your Class via the Grid View

Step 1: Locate the class you would like to manage in the Grid:

Your OLLI-UA Class Management Screen
From here you can see your upcoming class schedule, assigned classes, enrollments, run a class roster, and access a link to your dedicated class email.

There are two views - a calendar view and the grid view. The grid view offers the fastest way to access most of your general reporting needs. The grid only shows currently active classes. The calendar will show all classes past and present.

Click here for detailed instructions.

Step 2: Click on the More Info button.
The following popup will appear:

![Product Info]

**Understanding China**
Thursday, September 19, 2019, 9:00 AM - Thursday, November 21, 2019, 11:00 AM

![Reports] [Notes] [Attendance]

Close

From this menu, you can check your roster and email your class. More info on this below.

**Managing Your Class via the Calendar View**

**Step 1:** Use the calendar to locate the class you would like to manage:
Step 2: Click on one of the sessions of your class. The following popup will appear:

From this menu, you can check your roster and email your class. We recommend focusing on the Reports and Notes section to perform the class management activities outlined below.
Accessing Your Roster

Whether you are accessing your roster via the Calendar View or the Grid View, the easiest way to do so is via the Reports section.

Step 1: Click the Reports button on the menu(s) pictured above. The following popup will appear:
Step 2: Use the Legacy Product Reports section at the bottom to access your roster and/or waiting list.

To view your roster, check the box next to the Class Roster and Simple Sign-In option.

To view your waiting list, check the box next to the Wait List Staff Report option.

Or, you can check both boxes to view the reports at the same time.
Step 3: Click the Print button to view these reports on screen:

<table>
<thead>
<tr>
<th>Wait List Order</th>
<th>ProductName</th>
<th>Account First Name</th>
<th>Account Last Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>3461</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Constance P.</td>
<td>Brunt</td>
</tr>
<tr>
<td>3464</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Leonard</td>
<td>Cisneros</td>
</tr>
<tr>
<td>3474</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Helen</td>
<td>Warburton</td>
</tr>
<tr>
<td>3475</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Stanley</td>
<td>Read</td>
</tr>
<tr>
<td>3476</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Catherine</td>
<td>Welty</td>
</tr>
<tr>
<td>3478</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>LaVeta</td>
<td>Read</td>
</tr>
<tr>
<td>3482</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Alex</td>
<td>Wilson</td>
</tr>
<tr>
<td>3483</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Joy</td>
<td>Greenway</td>
</tr>
<tr>
<td>3486</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Edward</td>
<td>Farrellly</td>
</tr>
<tr>
<td>3487</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Bette</td>
<td>McConnell</td>
</tr>
<tr>
<td>3488</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>John</td>
<td>Kautz</td>
</tr>
<tr>
<td>3489</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Richard</td>
<td>Balash</td>
</tr>
<tr>
<td>3490</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Mary Jane</td>
<td>Henley</td>
</tr>
<tr>
<td>3491</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Elaine</td>
<td>Orman</td>
</tr>
<tr>
<td>3496</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Joel</td>
<td>Alpert</td>
</tr>
<tr>
<td>3497</td>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>Charles</td>
<td>Hunter</td>
</tr>
</tbody>
</table>

Or, click the Download button to download an Excel file with the same information:
Class Summary Report

The Class Summary Report is another handy tool available to you via the Reports button. It is a quick way to access key information about your class, including Title, Enrollment Count, Max Seats Available, Waitlist Count, Campus, Location, Days/Dates, as well as Number of Sessions and Session Hours. To access the Class Summary Report, follow the steps below:

Step 1: Click the Reports button and select the report from the middle Product Reports section.
Step 2: Click Print to view the report on screen, or click Download to download an excel file with the same information.

<table>
<thead>
<tr>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
<th>E</th>
<th>F</th>
<th>G</th>
<th>H</th>
<th>I</th>
<th>J</th>
<th>K</th>
<th>L</th>
<th>M</th>
<th>N</th>
</tr>
</thead>
<tbody>
<tr>
<td>Product Name</td>
<td>Enrollments</td>
<td>Max Seats</td>
<td>Active Wait List</td>
<td>Primary Instructor</td>
<td>Product Region</td>
<td>Product Location Title</td>
<td>Day(s)</td>
<td>Product Start Date</td>
<td>Product End Date</td>
<td>Session Count</td>
<td>Session Hours</td>
<td>Skip Dates</td>
<td>All Assigned Staff</td>
</tr>
<tr>
<td>Exploring Mexico and Mesoamerica - Part 1</td>
<td>77</td>
<td>77</td>
<td>50</td>
<td>David Shawver</td>
<td>Central Tucson Campus</td>
<td>Ocotillo Room</td>
<td>Wednesdays</td>
<td>5/1/2019 12:00:00 AM</td>
<td>6/5/2019 12:00:00 AM</td>
<td>6</td>
<td>12</td>
<td></td>
<td>Scott Aldridge, Kat Schumann, David Shawver</td>
</tr>
</tbody>
</table>