

Importing staff into Plan-it

1. Preparing new staff new staff to use Plan-it

To be able use the Plan-it Supervisor Area, to run reports on learner data and perform functions such as 'Forgot password' and 'Create new user', staff need to be imported into the Plan-it system by S-cool.

The following information needs to be sent to your School Support Team (SST), who will then send it onto S-cool so that staff can be imported into the Plan-it system. Your SST will need to receive the information at least two weeks before staff want to use Plan-it.

2. Information required by S-cool for each member of staff

- Title
- First name
- Surname
- Date of birth
- Gender
- Unique ID (to assign staff to groups in post-16)
- Type (PRE16 or POST16)
- Password

You will also need to indicate whether staff should have 'Administrator' access – this will mean they can see ALL students and perform administration functions. Those not assigned Administrator access will be given 'Supervisor' access, i.e. they can only report on, and access, learners in groups they are assigned to. Once staff are imported into Plan-it the school co-ordinator (someone with Administrator access) needs to assign all Supervisors to the groups whose information they need to be able to report on.

Please note: If agreeable to the school, Connexions Personal Advisers should have Administrator access so they can see ALL students and access 'Cause for concern' reports.

Your SST will send you an Excel/CSV file called '**Template for importing staff and learners**'. Please use this template to provide your SST with staff details. It can also be downloaded from section 4 of the online Plan-it Handbook (www.s-cool.co.uk/planithandbook).

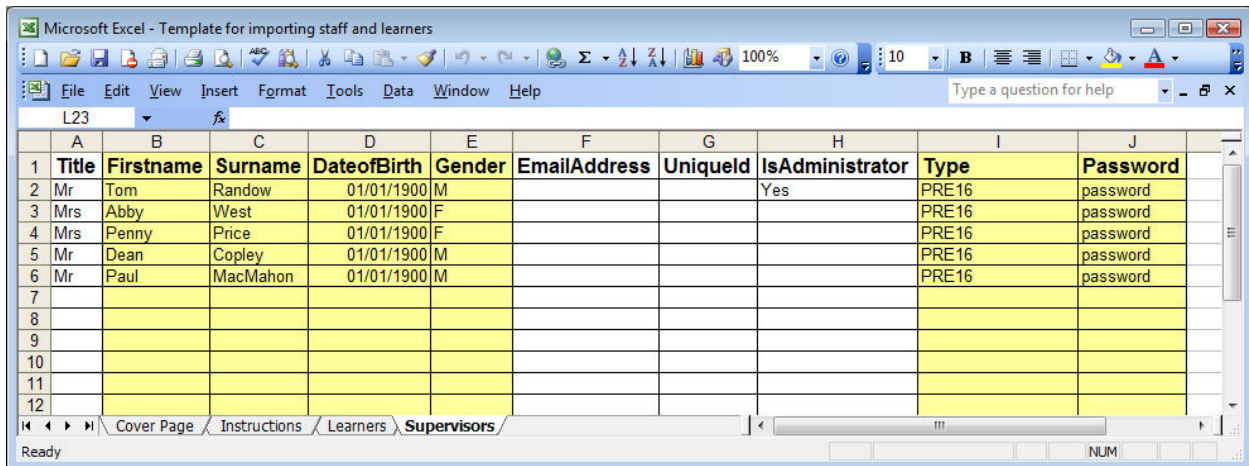
The import template includes four separate worksheets. These are:

- Cover page - to provide school and contact details for the S-cool Client Support Team
- Instructions - please read the instructions carefully before adding data to the template
- Learners - worksheet for adding learner data
- Supervisors - worksheet for adding staff data

The information that is provided about each member of staff in the import template will be the details they use to login to Plan-it.

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Example of completed Supervisor worksheet:



	A	B	C	D	E	F	G	H	I	J
1	Title	Firstname	Surname	DateofBirth	Gender	EmailAddress	UniqueId	IsAdministrator	Type	Password
2	Mr	Tom	Randow	01/01/1900	M			Yes	PRE16	password
3	Mrs	Abby	West	01/01/1900	F				PRE16	password
4	Mrs	Penny	Price	01/01/1900	F				PRE16	password
5	Mr	Dean	Copley	01/01/1900	M				PRE16	password
6	Mr	Paul	MacMahon	01/01/1900	M				PRE16	password
7										
8										
9										
10										
11										
12										

3. Staff imported into the Plan-it system in a previous academic year

If staff have already been imported into Plan-it in a previous year their information will still be in the system. However, those with Supervisor access will not be assigned to groups at the start of a new academic year. The school co-ordinator (someone with Administrator access) therefore needs to assign Supervisors to the appropriate groups at the start of each academic year. For full details on all 'Year End Arrangements' please see the relevant document in section 4 of the online Handbook.

If they are able to remember the password they used last year, they can continue to use it. If however staff have forgotten their passwords, secondary (temporary) passwords can be issued by your SST. When a secondary password is used to login the user will be asked to change it to something memorable.

Details of all Supervisors and Administrators who are in the system can be sent to the Plan-it co-ordinator by your SST.