



# Supervisor Area Access and Functions

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# 1.0 Overview of the Supervisor site

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## 1.1 Introduction

This document describes how to use the Plan-it supervisor website.

The Web address for the supervisor site is: <https://planit.s-cool.co.uk/supervisor>

There are two levels of access:

- **Supervisors** are given access to the information for the learners in the system that they are supporting through Plan-it. Details of the functions available to supervisors are given in this section.
- **Administrators** have access to a range of functions that allow a school to customise Plan-it to its requirements. Details of how to use the key administration functions available to schools (e.g. setting up subjects, creating groups of learners for reporting and assigning staff to groups) are given in section 4 of the Plan-it Handbook – ‘Key administration tasks’.

## 1.2 Overview

The supervisor site allows users to:

- Change their password.
- View reports showing progress of learners through the system.
- Report on learners’ usernames.
- Add comments to a learner’s Plan-it site.
- View a wide range of reports analysing the answers given by learners.
- Access ‘Cause for concern’ reports.
- Take part in a review with the learners they are supporting.
- Access a ‘Progress towards certificate’ report.

Please note – supervisors are given access to groups of learners by administrators in their school. Supervisors can only view information relating to learners that they have been given permission to see. Administrators can see all learners in their school.

# 2.0 Supervisor login



## 2.1 Introduction

To access the supervisor site staff first need to login using the details and password that were set in the import template created by their provider. If staff don't know these details they must refer to a Plan-it Administrator at their provider.

## 2.2 First time supervisor login

Supervisors are required to enter a username and password to access Plan-it.

If a supervisor is logging in for the first time they will need to create their username and password.

To create a username click on the 'Create your new username' link on the login page.

## 2.3 Creating a username

To create a username for their Plan-it profile a supervisor must first enter the following details, as set by the provider in their import template:

- First name
- Surname
- Date of birth
- Password

Click 'Login' and then enter a unique username and new password.

## 2.4 Subsequent login

Once a supervisor has set up their username and password they must use these details to login to Plan-it each and every time they wish to access their profile and information about their learners.

# 3.0 Changing supervisor password



## 3.1 Changing staff password

From the Supervisor homepage a member of staff can change their password at any time. To change the password, click **'My profile'**.

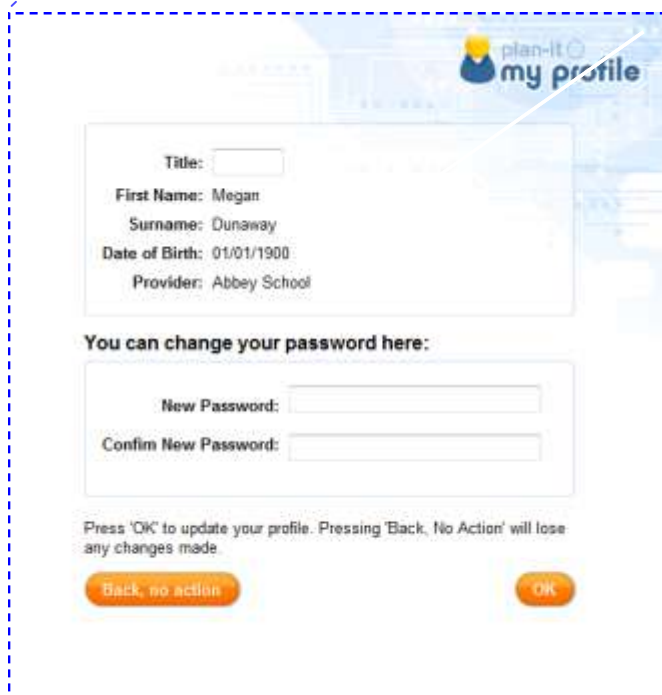


## 3.2 My profile

From this screen a supervisor can:

Change their password by typing a new password into the text boxes.

Click **'OK'** to save and return to the supervisor home page.



## 3.3 Forgotten password

If a supervisor forgets their password during the course of a year they will need to contact their Plan-it co-ordinator/Administrator for a new password.

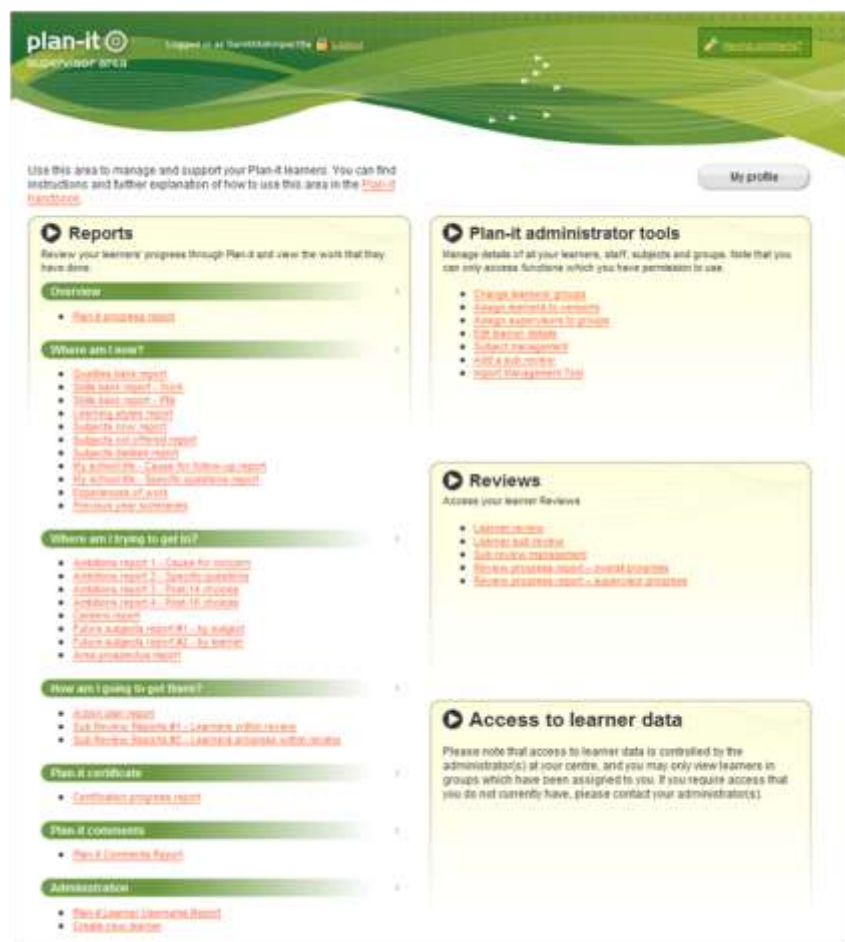
# 4.0 Plan-it reporting



## 4.1 Introduction

Supervisors can access a number of reports through the Plan-it supervisor site, which enables them to look at and compare the data that learners are building up in their Plan-it profiles. All of the reports are accessed from the supervisor home page.

To run a report the supervisor filters a search by year group and then sub-group to identify the learners they want to report on. The report data is displayed on the page within Plan-it unless there are more than 100 rows. In this case the data is automatically exported to Excel. Reports with less than 100 rows can also be exported out of Plan-it.



## 4.2 Reporting on learner progress

To check learners' progress through Plan-it:

Click the '**Plan-it progress report**'.



# 4.0 Plan-it reporting



continued

## 4.3 Plan-it progress report

Choose a year group and then sub-group from the two drop-down menus.

Click **'Search'** to generate the report.



## 4.4 Sample Plan-it progress report

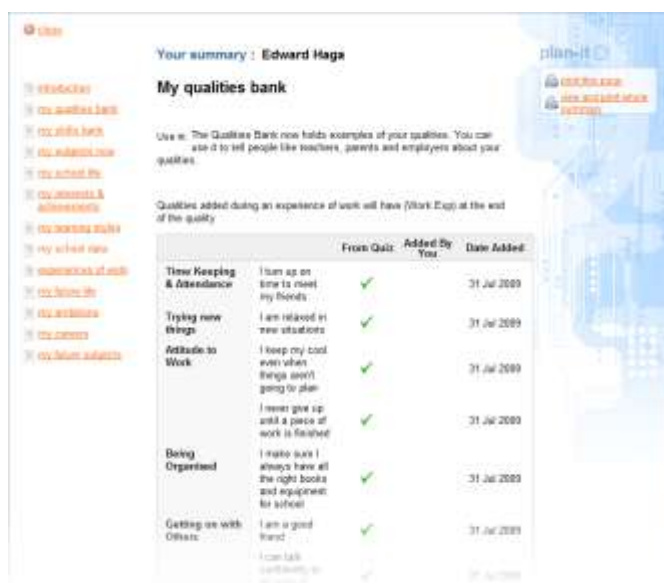
To run the same report on another group select an alternative group using the drop-down menus.



## 4.5 Accessing a learner summary

To access a summary of all of a learner's Plan-it work click 'View summary' link.

This can be very useful if a supervisor is meeting with a learner to discuss their year 9 options, work placements, plans for post-16, etc.



# 5.0 Help learners log into Plan-it



## 5.1 Introduction

Learners are required to set up their own username and password the first time they access Plan-it. However, from time to time, a learner may be unable to log into Plan-it for one or more of the following reasons:

- They have forgotten their username
- They have forgotten their password
- They do not have a learner account

Use the following table to decide what to do if a learner cannot log into Plan-it.

IF you...	THEN...
know or suspect that the learner has forgotten their username	Run the Plan-it Learner Username report to find out the username, as described in the following section.
know or suspect that the learner has forgotten their password	Instruct the learner to use the forgotten password option on the Plan-it login page to retrieve their password.
are not sure if the learner has Plan-it account	Run the Plan-it Learner Username Report to determine whether the learner has an account, as described in the following section. If they do not have an account, you can create one for them.
know the learner does not have a Plan-it account and you want to create one	Create a new user account for the learner, as described in 'Create a new learner' on page 10.

## 5.2 To run the Username Report

1. Go to your Supervisor Home page.
2. In the 'Reports' section, under 'Administration', click 'Plan-it Learner Username Report'. The 'Learner Username Report' page is displayed.
3. Choose a year group from the drop-down list.
  - To show all users in a specific year, click **Submit**.
  - To show users with a specific surname, enter the surname, and click **Submit**. (continued on the following page)



# 5.0 Help learners log into Plan-it



The Learner Username Report shows the following learner details:

- First name
- Surname
- Date of Birth
- Username

**Note:** If the 'Username' column for a learner shows the first name, surname and date of birth, this means that the learner has not yet logged into Plan-it and set up their own username.

- If you see the learner you want, communicate the username to the learner in a confidential manner so they can log into Plan-it.
- If you do not see the learner listed in the report, they do not have an account in Plan-it. You can create a new account for them, as described in 'Create a new learner' on the following page.

Username	Surname	Date of Birth	Username	Year Group	House Name
Cohen	Piper	1/3/1991 12:50:08 AM	piper	9 A	
Pearce	Armstrong	1/3/1991 12:50:38 AM	armstrong	9 B	
Travis	Ballentine	1/3/1991 12:50:08 AM	BALLENTINE	9 E	
Jani	Baldry	1/3/1991 12:50:08 AM	BALDRY	9 B	
Cydney	Bremner	1/3/1991 12:50:08 AM	Bremner	9 A	
Trey	Bogg	1/3/1991 12:50:58 AM	bogg	9 B	
David	Bolowski	1/3/1991 12:50:08 AM	Bolowski	9 E	
Evika	Brigg	1/3/1991 12:50:08 AM	Evika Brigg,1 (Newly 1991)	9 C	
Phena	Briner	1/3/1991 12:50:08 AM	Phena Briner,1 (Newly 1991)	9 C	

# 6.0 Create a new learner account



If you find that a learner does not have an account in Plan-it, you can create a new account for them.

IF...	And...	THEN...
The learner already has a Plan-it account	You try to create another account for them	You are informed that the learner already exists within your provider. In this case, you can run the username report to obtain the login details, as described in 'Create a new learner account' on the following page.  If the learner exist within another provider, contact S-cool support to
The learner has neither a Plan-it or Work Experience account	you create a new Plan-it account for the learner	If your provider is enabled in Work Experience, both new Plan-it and Work Experience accounts are created for the learner.  If your provider is not enabled in Work Experience, only a Plan-it account is created for the learner.
The learner has a Work Experience account but no Plan-it account	you try to create a new Plan-it account for the learner	After you submit the learner details, you are notified that the user already exists in the system and asked to contact S-cool Support at support@s-cool.com.

When you create a new learner in Plan-it, and Work Experience is enabled, the Work Experience account that is automatically created for the learner is in the same year group as their Plan-it account .

If you are a Pre-16 supervisor, you can only create learners in Pre-16 year groups. Likewise, if you are a Post-16 supervisor you can only create learners in Post-16 year groups.

## 6.1 Learners with existing accounts

If you try to create a Plan-it account for a learner that already has one, a message is displayed explaining either that the learner has an account at your provider or that they have an account with a different provider. To add this learner to your provider or to move them from another provider, contact S-cool Support at support@s-cool.com.

# 6.0 Create a new learner account



## 6.2 To create a new learner account

1. Go to your Supervisor Home page.
2. In the 'Reports' section, under 'Administration', click 'Create new learner'.
3. Specify the following learner details, as appropriate:
  - First name (Mandatory)
  - Middle name (Optional)
  - Surname (Mandatory)
  - Year group (Mandatory)
  - Tutor group (Mandatory)
  - Date of birth (Mandatory)
  - Gender (Mandatory)
  - Ethnicity (Optional)
  - UPIN (Optional)
  - Password (Mandatory)
4. Click **Submit**. The new learner account is created.

A screenshot of the 'plan-it' system's 'Create a New Learner' form. The form is titled 'Create a New Learner:' and contains several input fields and dropdown menus. The fields are: First Name, Middle Name, Surname, Year Group, Tutor Group, Date of Birth (with Day, Month, and Year dropdowns), Gender (with a 'Please Select' dropdown), Ethnicity (with 'Any Other Asian Background' as an option), UPIN, and Password (with a 'No Enter Password' note). A 'Submit' button is located at the bottom left of the form. The background of the page is green with a wavy pattern.

# 7.0 Delete a learner account

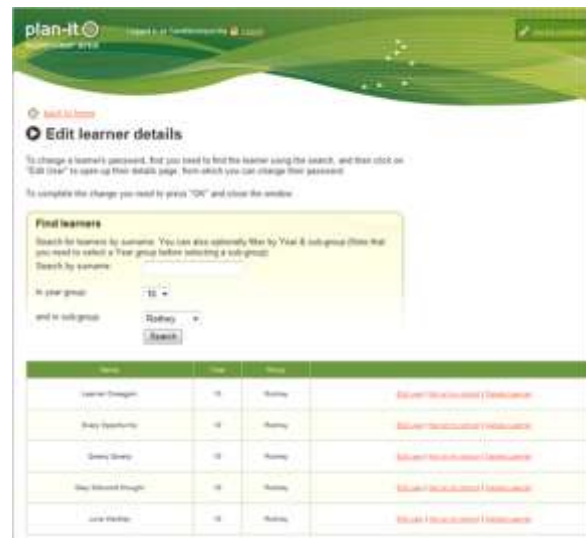


If necessary, you can delete a learner account from the Plan-it system, as long as:

- The learner or a teacher have not yet logged into the learner account, and
- The learner is not included in a tutor group

### To delete a learner:

1. Find the learner you want to delete by typing a name into the text box and selecting 'All' for year and sub-group.
2. Click **Search** to display the learners.
3. For the learner whose account you want to delete, click **Delete Learner**. The *Delete Learner* window is displayed.
4. Click **Delete Learner**. The learner account is deleted.



# 8.0 Commenting on learner's Plan-it work



## 8.1 Introduction

In order to support their learner's use of Plan-it, supervisors can assign comments to their learners through the supervisor site. From the Plan-it Comments Report supervisors can view comments that have been assigned by other members of staff, see those that have been viewed by learners and add their own comments.

## 8.2 Plan-it Comments Report

Select '**Plan-it Comments Report**' from the supervisor home page.



## 8.3 Generating a report

Choose the year group and sub-group, then click on '**Search**' to generate a list of learners and their comments.

The comments report gives an overview of the number of comments that have been added and those that have been dealt with by the learner.

To view, add or edit comments click 'View & add Comments' link.



## 8.4 Viewing comments

View existing comments that have been added by supervisors and add or edit comments.



# 9.0 Exporting Plan-it reports to Excel



## 9.1 Introduction

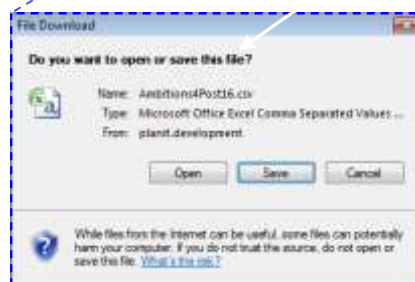
Plan-it reports can be exported as CSV or Excel files, which can then be manipulated and edited in a spreadsheet program. A report with less than 100 lines of data can be viewed within the Plan-it page, as well as being exported, but reports over 100 lines are automatically exported out of Plan-it.

## 9.2 Generating Plan-it reports

Once a report has been run, click either 'export to .csv' or 'export results (excel)'

A dialogue box will pop-up and ask if you want to 'Open' or 'Save' the file.

Choosing to save the file means the data can be compared to learner data that is generated in the future, but remember that all data must be stored securely.



## 9.3 Save exported file

Choose an appropriate name and location to save the file.

The data can now be opened in a spreadsheet program such as Excel and edited further.

