

PORTLAND STATE UNIVERSITY



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## Counselor Administrator's Guide

**National Learner Web Staff**  
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## The Learner Web Administrative Site for the Counselor Administrator

The main responsibilities of a Counselor Administrator are to:

- Create Counselors
- Match Learners with Counselors.
- Generate Reports

### Logging in to the Administrative Site

1. Once you receive your username and temporary password from Learner Web staff, go to [admin.learnerweb.org](http://admin.learnerweb.org) to log in to the administrative site.
2. Once logged in, you will see on the left side of your screen the Counselor Administrator Menu containing several items/link, some of which are expandable with a “plus” sign next to them.
3. The list of items includes:
  - a. **“Manage Counselors”** is where you create new Counselor accounts and edit or delete existing ones
  - b. **“Counselors”** is an expandable item that lists all of your Region’s Counselors. To expand the item and to view your Region’s Counselors, click the “plus” sign next to it
  - c. **“Reports”** is where you can generate reports about Learners’ performance
  - d. **“New Counselor Requests”** is where you can view Learners’ requests for a Counselor
  - e. **“Accepted Counselor Requests”** are Learner Counselor Requests that you have accepted in the “New Counselor Requests” section but that have not been matched with a Counselor. These requests are listed in this section and you can either match them with a Counselor or “Unaccept” them

**Important Disclaimer:** In order to carry out the following instructions you will have to login to the Learner Web Administrative Site. To do so, go to <http://admin.learnerweb.org> and login using your Counselor Administrator username and password. If you are using the same account for multiple administrative roles, you will need to make sure that you are in the Counselor Administrator Menu. In the case that you are directed to a different menu, click on the “Counselor Administrator” on the left hand side of the screen.

## The Basics

### How to Create a Counselor

- ✓ In the Counselor Administrator Menu on the left-hand side of the screen, click on “Manage Counselors”
- ✓ Now click on “New Counselor”
- ✓ Make sure your Region’s check box next to “Regions” is checked
- ✓ Enter the Counselor’s screen name, a password for them and, if you wish, their first and last name, and their email
- ✓ Click on “Save”

### How to Edit/Delete a Counselor Account

**NOTE:** You can use the “Edit” function to update/change Counselor’s account information but you can also use it designate their available contact hours and the subjects/skills they can help with.

- ✓ In the Counselor Administrator Menu on the left-hand side of the screen, click on “Manage Counselors”
- ✓ You should be prompted with a form that lists all of your Region’s Counselors

Then,

1. If you wish to delete a Counselor, click on “Delete” next to the Counselor’s screen name

2. If you wish to Edit the Counselor account, add their availability information or the subjects/skills they can help with, click on “Edit” next to their screen name
3. You should be prompted with the Counselor Account information
4. You can edit their password, first and last name and their email by editing the appropriate fields
5. Notice that the form contains a calendar listing all 7 days of the week with 1 hour time slots under each day. This is where you designate the Counselor’s contact availability
6. Click on the times slots that the Counselor is available for contact
7. Now scroll down to where it says “Helper Skills”. This is where you designate the subjects and skills the Counselor can help with
8. Click on the “plus” sign next to “Helper Skills”
9. Check the boxes next to the appropriate subject/skill
10. Click on “Update”

## How to match Learners with Counselors

**NOTE:** If your Region has Counselors, all new Counselor requests will be listed under “Counselors are available in the Region that received the request”. If your Region does not have any Counselors yet, then all new Counselor requests will be listed under “No Counselors in Request Region”. In the case of the latter, you will need to create Counselor accounts before matching Learners with Counselors.

- ✓ In the Counselor Administrator Menu on the left-hand side of the screen, click on “New Counselor Requests”
- ✓ You should be prompted with a form listing all new Counselor requests

Then,

1. Notice how the list contains the Learners’ login/screen name, their name, the reason why they requested a Counselor, the Goal/Learning Plan they requested the Counselor for and the request date
2. To match a Learner with a Counselor click on “Accept Request” next to the Learner’s request date on the right-hand side of the screen
3. You should now be prompted with a list containing all of your Region’s Counselors and their information

4. On the right-hand side of the screen, click on “Make Match” in the field next to the Counselor you want to match the Learner with

## How to Generate Reports

1. In the Counselor Administrator Menu on the left-hand side of the screen, click on “Reports”
2. You should now be prompted with the Report form
3. Next to “Choose Report” there is a drop-down menu with 4 report options
  - a) Aggregate Learning Plan Report
  - b) Aggregate Plan Average Time Duration Report
  - c) Aggregate Step Report
  - d) Plan Status Report
4. Choose the most suitable option from the drop-down menu for your purposes
5. Enter the Report’s name in the text box next to “Report Name”.

**NOTE:** The report will be in Microsoft Excel format and this is going to be the file’s name. For example, if you choose the name “GED” then the Excel file that will be generated will be “GED.xls”

6. Choose the Learning Plan you want reports for from the list next to “Learning Plans”
7. Choose a Start Date and an End Date for your Report. NOTE: The Learning Plan might have been used by Learners for the past year, but you might only want a Report on the Learning Plan’s activity in the last month
8. Notice how “Counselors: All” is checked. This will generate a Report for the Learners under all of your Region’s Counselors
9. If you do not want a Report for all of your Counselors’ Learners uncheck the box next to “Counselors: All”
10. You should be prompted with a list of all of your Region’s Counselors
11. Select the Counselors you want by click on the check box next to their screen name
12. Click on “Generate Report”

13. The screen should refresh
14. The newly generated Report should be listed at the bottom of the Report form under “File Name”
15. Click on the Report to Open in or Save it to your computer