OneFile

Creating Accounts

Overview

As a Centre/ User Manager, creating the other users in your organisation is one of your main responsibilities. As a general rule of thumb, you should create all of your users before you create learners. However, it is possible to create a learner provided that at least one Assessor has been created.

User Restrictions

User Role	Description
Centre Manager User Managers	Centre Managers can create any account appart from the EV. User Managers can create any account accept from Centre Manager, User Manager and EV accounts. *If you are looking to create an External Verifier, you will need to contact the OneFile support team on support@onefile.co.uk.*

Details

To create an account, simply follow these steps below.

Click here to find guidance on creating an eportfolio account.

1. Click the **Users** icon on the left hand side.
2. Select a user group from the tabs at the top of the page.
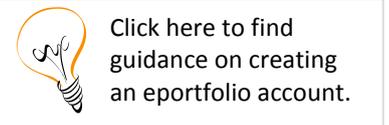
   Users

   Note – The tab you select is the user group of the person you are creating the account for.

3. Click the **Create new** button. If you have selected the Assessor tab, the button will read **Create new Assessor** and so on.

4. Enter the user's **First name**, **Last name** and their **Email** into the fields shown. Enter the **MIS value** if this is necessary.

New Observer

First name:

Last name:

Email:

If you are using a Management Information System, record the MIS unique identity of this user here. This will allow any data you export from OneFile to be identified within your MIS. Do not record the Unique Learner Number (ULN) here - use the Learner tab instead.

MIS value:

Depending on what account you are creating, there may be an additional section that you can fill in on this page. The table on the next page displays the additional settings that can be selected for each user group.

5. Select any additional settings that may be relevant to the user.

User Group	Additional Setting	Description	
Assessor & Trainee Assessor	Caseload	**Assessor Caseload** Target caseload: [35] learners (0 = ignore)	You can enter a **Target caseload** when you create an Assessor account.
	Manage Learners	**Account Settings** ☑ This user can manage learner accounts	This setting displays the **Manage Learners** icon on the Assessor's homepage. It allows the Assessor to create their own learners & also gives them access to all of the tabs at the top of the learner's portfolio.
Trainee Assessor	Second Line Assessor	**Second Line Assessor** Select...	Trainee Assessors need a qualified Assessor to verify your work. You can select the qualified Assessor when you create the Trainee Assessors account.
Internal Verifier	Countersigner	**Countersigner** Select a countersigner: Do not use a countersigner	If the IV account you are creating is for a Trainee, you can select a qualified IV to verify their work. Selecting a countersigner changes the account from an IV to a Trainee IV.
Employer & Observer	Placement	**Placement** Default Placement ☐ Automatically grant access rights to all learners currently under this placement	When creating an Observer, you can directly link them to a specific placement. There is also the option to grant them access to all learners within that placement.

6. Click the **Save** button.

Login details

When the details have been saved, the account will be created and you will be presented with the user's login details.

If you want to print out the log in details, click the **Print Details** button.	If you would rather send an email containing their details, click **Continue.**

If you click **Continue** you will need to follow these steps to email the log in details to the user.

1. Click the **Account** tab at the top of the page.
2. Scroll to the **Login details** section.
3. Click the **Email** button.