



Click here to find guidance on creating

an eportfolio account.

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	Centre Managers can create any account appart from the EV.
20	User Managers	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 <u>support@onefile.co.uk</u> .

Details

To create an account, simply follow these steps below.

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

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.

Users

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

Home					
ATTENTION! Please check that you have a copy of these login details before clicking the continue button.					
OneFile Login Details for TEST OBSERVER					
Login page: https://www.onefile.co.uk/login.aspx?srv=sof2 Username : TOBSERVER6 Password : test123					
IMPORTANT - PLEASE READ					
* You are required to change this password when you first login					
* NEVER give your login details to anyone else including your employer or assessor					
* Your username and password are CASE-SENSITIVE so remember to capitalise any letters as appropriate. If you receive the message 'INCORRECT LOGIN DETAILS' it is because you are typing in the wrong username or password, or because you are not using capital letters where appropriate.					
* After logging in for the first time, please register your EMAIL address in MY PROFILE to benefit from future task alerts and password reminders					
* If you have difficulty logging in then you must contact the person who originally issued you with these login details.					
Print Details	Continue				
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.