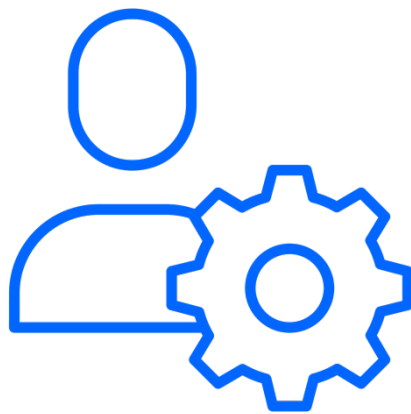




Support Guide

User Creation



Centre Manager

The Centre Manager administers the centre on OneFile, they have the responsibility of ensuring the OneFile centre is set up correctly, sets up access for other users on the Centre, with the exception of External Verifiers, who have to be registered by the OneFile support team.

Centre Managers are able to:

- Change/set up your centre settings
- Create folders and upload files to your centre resources
- Create user accounts

Centre Monitors

The Centre Monitor has read only access to all portfolios on the system and is ideal for reporting on all aspects of Centre Monitors are able to:

- View and export centre reports
- View learner portfolios (Read Only)
- View details of other users on the Centre

Note – A Centre Manager has the ability to restrict your access to learners of selected classes.

User Managers

The User Manager has an administrative role and has the ability to create all account types apart from Centre Managers and EVs. They do not have access to the Centre Settings, the quality icon or the learner portfolio.

User Managers are able to:

- Create user accounts
- Create classes & placements
- Create framework templates

External Verifier

The External Verifier is a person assigned by the Awarding Body to ensure protocol is followed by the Internal Verifier. EVs are also known as; Standard Verifier, External Quality Assurer or External Moderator.

External Verifiers are able to:

- View a learner's Portfolio
- Sample assessments and assessment plans
- View the IVs sampling tables and other reports

Lead IV

A Lead Internal Verifier is the person designated by a centre to act as the point of sign-off for the assessment and internal verification of programmes in a Principal Subject Area.

Lead IVs are able to:

- Setting up sampling policies
- Sample assessments & assessment plans
- View & report on Assessor Observations & Learner Interviews

Note – The Lead IV account needs to be enabled by a Centre Manager in the Centre Settings.

Internal Verifier

The Internal Verifier is a person employed by the training organisation to ensure that the Assessors have followed the Awarding Body's criteria for the qualification being assessed. Also known as Internal Quality Assurers.

Internal Verifiers are able to:

- Setting up your sampling plan
- Sample assessments & assessment plans
- Carry out Assessor Observations & Learner Interviews

Assessor

The Assessor is employed by the training organisation. This user supports and evaluates learners working towards qualifications, making sure that they meet the occupational standards required.

Assessors are able to:

- Create Assessment Plans of learning & development for every learner
- Assess & annotate learner evidence
- Schedule and complete learner reviews

Trainee Assessor

The Trainee Assessor has the same access as a qualified Assessor. However, any assessments or Unit Summaries that are signed by the trainee must be countersigned by a second line Assessor.

Learner

The learner is a person taking a qualification or apprenticeship with a training provider.

Learners are able to:

- Add evidence & files to the portfolio
- Receive tasks and send assessments to their Assessor
- Track their own progress

Employers

The Employer is an interactive account that can access the learner portfolio.

Employers are able to:

- Sign certain types of assessments
- Sign Reviews & the ILP
- Report on and track the progress of their learners

Note – The employer account needs to be enabled by a Centre Manager in the Centre Settings.

Observers

The observer has read only access to the learner portfolio.

Observers are able to:

- View the learner portfolio
- Report on and track the progress of their learners

Creating users on OneFile is a feature that is available to both Centre Managers and User Managers. This is one of their core responsibilities and we recommend that your Centre is setup before starting to create your users.

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.

[Restrictions](#)

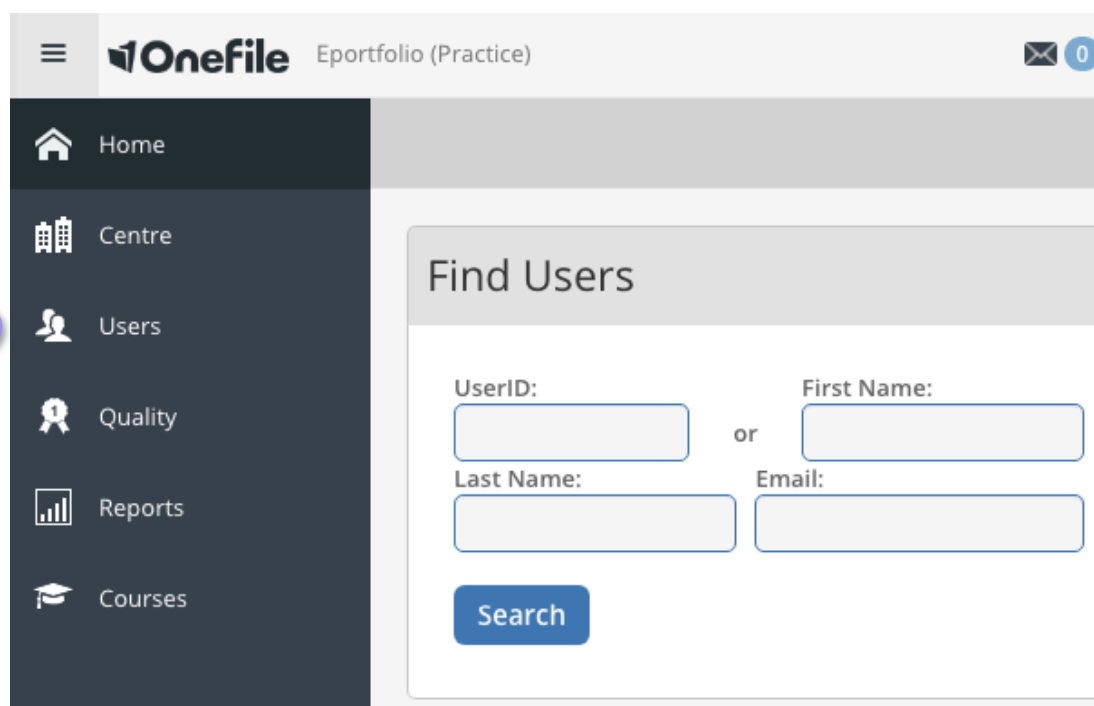
Centre Managers can create any account except for an External Verifier.

User Managers can create any account except for Centre Manager, User Manager and External Verifier.

If you are looking to create an External Verifier, you will need to contact the OneFile support team at support@onefile.co.uk.

Step 1

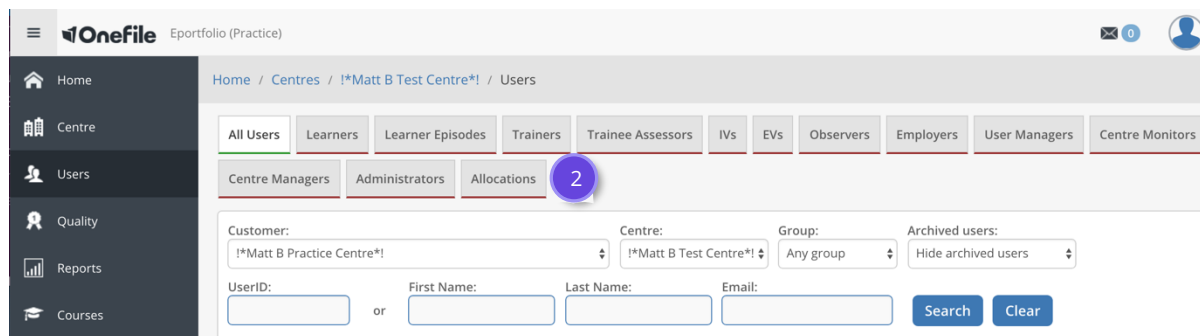
Click on [Users](#) in the navigation menu.



The screenshot shows the OneFile Eportfolio (Practice) interface. On the left is a dark navigation menu with icons and labels for Home, Centre, Users, Quality, Reports, and Courses. A purple circle with the number '1' is placed next to the 'Users' option. The main content area has a header with the OneFile logo and 'Eportfolio (Practice)', and a notification icon with '0'. Below the header is a 'Find Users' section with four input fields: 'UserID:', 'First Name:', 'Last Name:', and 'Email:'. The 'UserID' and 'First Name' fields are on the top row, separated by 'or'. The 'Last Name' and 'Email' fields are on the bottom row. A blue 'Search' button is at the bottom of the form.

Step 2

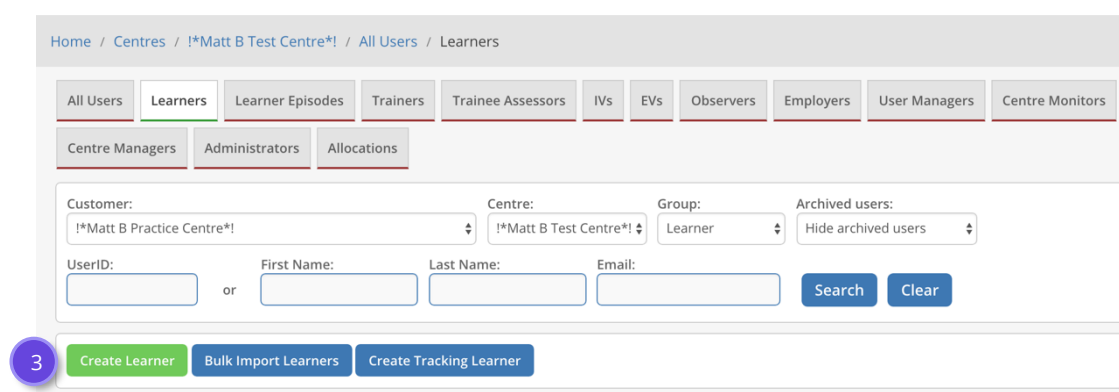
Click the [user type](#) you wish to create.



The screenshot shows the Onefile Eportfolio (Practice) interface. The left sidebar contains navigation links: Home, Centre, Users, Quality, Reports, and Courses. The main content area shows the breadcrumb path: Home / Centres / !*Matt B Test Centre*! / Users. Below this is a row of tabs: All Users, Learners, Learner Episodes, Trainers, Trainee Assessors, IVs, EVs, Observers, Employers, User Managers, and Centre Monitors. A second row of tabs includes Centre Managers, Administrators, and Allocations. A purple circle with the number 2 highlights the 'Allocations' tab. Below the tabs are search filters for Customer, Centre, Group, and Archived users. At the bottom, there are input fields for UserID, First Name, Last Name, and Email, along with Search and Clear buttons.

Step 3

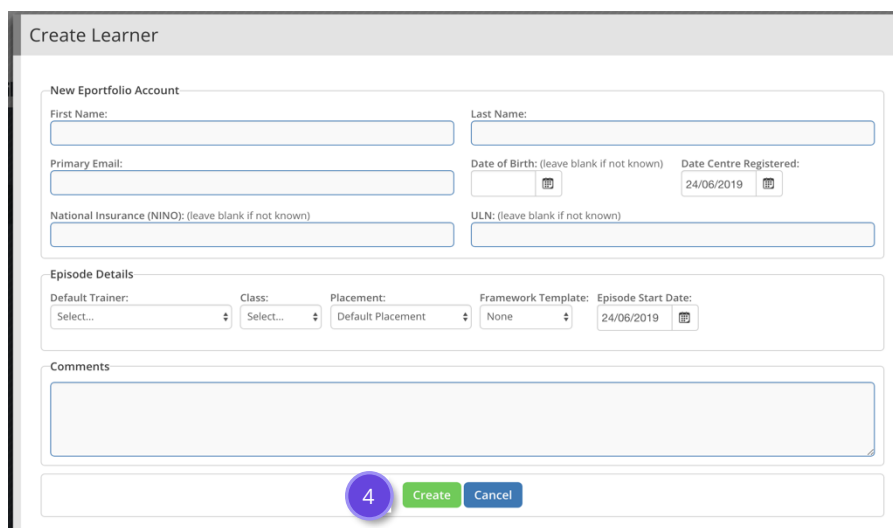
Once you have selected the type of user you would like to create, click the [create 'user'](#) button.



The screenshot shows the Onefile Eportfolio (Practice) interface with the 'Learners' tab selected. The breadcrumb path is: Home / Centres / !*Matt B Test Centre*! / All Users / Learners. The tabs row now includes 'Learners' as the active tab. Below the tabs are search filters for Customer, Centre, Group, and Archived users. At the bottom, there are input fields for UserID, First Name, Last Name, and Email, along with Search and Clear buttons. A purple circle with the number 3 highlights the 'Create Learner' button in the bottom navigation bar.

Step 4

Fill in the relevant information on the user creation wizard and click the [create 'user'](#) button.



The screenshot shows the 'Create Learner' form. It is divided into three sections: 'New Eportfolio Account', 'Episode Details', and 'Comments'. The 'New Eportfolio Account' section includes input fields for First Name, Last Name, Primary Email, Date of Birth, Date Centre Registered, National Insurance (NINO), and ULN. The 'Episode Details' section includes dropdown menus for Default Trainer, Class, Placement, and Framework Template, along with a date field for Episode Start Date. The 'Comments' section has a large text area. At the bottom, there are 'Create' and 'Cancel' buttons. A purple circle with the number 4 highlights the 'Create' button.

Step 5

The [username](#) and a [temporary password](#) will be displayed; you can provide these details to the user.

Step 6

If you wish to print this window, click the [Print Details](#) button.

Step 7

To finish, click the [Continue](#) button.

New Login Details

ATTENTION! Please check that you have a copy of these login details before clicking the continue button.

OneFile Practice Area Login Details for Robert Wilifred

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5 Login page: <https://login.onefile.co.uk/?srv=sof2>
Username : RWILIFRED1
Password : Tuv8n4ejHT

=====

IMPORTANT - PLEASE READ ...

- NEVER give, or share your login details with anyone else.
- Your username and password are CASE-SENSITIVE so remember to capitalise any letters as appropriate.
- After logging in for the first time, please register and/or verify your email address in 'My Profile'.
- If you have difficulty logging in then: try clicking 'Forgot your password?' on the login page, or contact the person who originally issued you with these login details.

6 Print Details Continue 7

Step 8

The user page will now be display, click the [Email](#) button to send the login details directly to the provided email address.

User information

First Name: Robert

Last Name: Wilifred

Primary Email: rwilifred@onefile.co.uk (Not verified) Edit

Date of Birth: (leave blank if not known)
15/07/1997

Login details

Group:	Username:	Keychain:	New password:	<input type="checkbox"/> Suspend user access - enter reason:
Learner	RWILIFRED1	No	<input type="text"/>	<input type="text"/>

Reset Email 8