One File Centre Management Guide – Context

This document provides further information on all the stages presented in the One File Centre Management Flowchart guide. For easy navigation of this document, you can hold the control (Ctrl) key on your keyboard and click on the relevant contents table section that you want to locate, this will move you to the correct page.

Text in a **bold orange font** refers to a user role in One File and text in a **bold blue font** refers to a feature or function.

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If you require support with the management of your One File Centre, please contact the Digital Education Team.

Stage 1 – Initial Setup

1. Assess Whether a New Centre is Required for the Programme. This decision can be made based on the following consideration, if the new programme does not match the following statements (yes is the default), then a new centre may be required:

    a. Is the **Timesheets** tool being used to log student/learner hours? **YES**
    b. Is **'off-the-job' time** being recorded by the student/learner? **YES**
    c. Is the **Learning Journal tool** being used by the students/learners? **YES**

    You may also consider creating a new centre if there is key **terminology** changes that would cause confusion for other programmes (this typically includes changes to any of the core user roles such as **Tutor** or **Employer** whereby they are referred to differently such as a Practice Educator or a Contact Tutor).

    If a new centre is required, please contact the Digital Education Team digitaleducation@lincoln.ac.uk

2. Request Apprenticeship Learning Aims/Standards. **Programme Lead** confirms **apprenticeship standards and frameworks** by providing the relevant code, title, and link to the Institute of Apprenticeships website and supporting documentation.

    Programme Teams with a **Centre Manager** account can request these through the Support Tab of One File, however you can also contact the Digital Education Team digitaleducation@lincoln.ac.uk for support in placing the request. You can search for your programme's standard on the Institute of Apprenticeships website. Click Here to Access the Institute for Apprenticeships Website (Webpage).

3. Review Requirement for Custom Learning Aims. **Programme Teams** have the ability to request additional **learning aims** for their One File Centre that are not provided by the institute of apprenticeships, for example a learning aim based on internal learning outcomes for the degree element of the apprenticeship.

    Programme Teams will need to provide the required information in a support ticket to One File. The request should be sent in the following format *(example in italics):*

    - **Aim title:** *BSc (Hons) Food Science and Technology*
    - **Unit(s)/Module(s):** *[FDS1115M] Food Law, Ethics and CRS*

    Then for each Unit/Module:

    - **Outcome Names:** *[FDS1115M] Food Law, Ethics and CRS*
    - **Criteria List:** *The learner has passed fds1115m food law, ethics and csr module.*

    Note: The time required for custom learning aims can vary based on demand and complexity.

4. Review Learning Aims and Place in Live Centre. Once the requests for learning aims have been completed by One File, they will be sent to the practice area for quality checking, you will receive a confirmation email when this stage has been completed.

    Upon receipt of the email, the **Programme Team** should inform Digital Education, who can then provide either:

    a. A username and password for the practice area, where the programme lead can review the aims.
    b. Or provide a PDF report of the learning aims and standards for checking.

The **Programme lead** will need to confirm to the Digital Education Team that the **learning aims**, and standards are correct, then either the Digital Education Team or the **Programme Team Member** who initiated the request, can confirm to One File that these can be made live.

5. Create Centre and User Manager Accounts. **Programme Teams** will need to create or request the relevant **User Manager** accounts in One File for the staff members that will be administering the programme, assuming these do not already exist.

User Managers have the ability to create all account types apart from **Centre Managers** and **External Verifiers**. They do not have access to the Centre Settings, the quality icon, or any learner portfolios.

To create an account, please follow the steps below:

1. Click **Users** in the navigation menu
2. Click the **tab** of the type of user you would like to create
3. Click on the **Create [User role title]** button
4. Enter the details of user – First Name, Last Name, Email Address
5. Click **Create**

Click here to Access the Guide - Overview of User Roles (Online PDF)

If you require a Centre Manager account or are unsure about which user role should be created, please contact the Digital Education Team digitaleducation@lincoln.ac.uk

Stage 2 - Centre Setup

1. Create Framework Templates for Apprenticeship Pathways. **Programme Teams** who have **User Manager** access will need to create the **Framework Template(s)** required for the apprenticeship.

   A **framework template** is a collection of **learning aims**, which will typically include the apprenticeship standard, gateway to endpoint and endpoint assessment. You have the ability to define individual units selection and anticipated start and end dates.

   Note: You should create an individual framework template for each pathway of your programme, where it would be beneficial to separate the learners, and indicate different durations i.e. a full time and part time pathway. The **framework template** indicates planned start and completion date based on months from learner start date (months identified in the **framework template**; start date identified in the **cohort**).

2. Create Student Cohorts/Groups. **Programme Teams** who have **User Manager** access should next create the **Cohort(s) or Groups** required for the apprenticeship. A **cohort** in One File organises learners by programme and intake year, though you can specify your own identifiers, and require a start date and **framework template**.

   You will also have the opportunity to select which **assessment methods** are being used by the centre, it is best practice to create these before creating the cohort, to reduce the number of amendments required.

   Note: You can add new assessment methods at any time, but you will need to assign these to the cohort from the Edit Cohorts menu and selecting all applicable assessment methods.

3. Review of Assessment Methods. **Programme Teams** who have **Centre Manager** access will need to create all relevant **assessment methods** required by the programme, these are select when a **learner** or **tutor** creates an **assessment** within the One File system. **Assessment methods** require a reference code (three-character limit), description, and permission settings including whether a learner can start this type of assessment, and if an **employer** is required to sign before a **tutor**.

   [Click here to Access the Guide - Creating Assessment Methods (Online PDF)]()

   Note: All assessment methods need to be manually added to a cohort if the method was created after the cohort, this can be completed from the Cohorts menu by clicking the Edit button.

   If you require support with this stage, please contact the Digital Education Team
   digitaleducation@lincoln.ac.uk

4. Create Assessment Templates (as required). Following the creation of **assessment methods**, **Programme Teams** who have **Centre Manager or Tutor/Assessor** access should create **assessment templates** to be assigned to learners either individually or though an activity plan (discussed in the next step).

   Assessment Templates allows programme teams to predefine assessments that can be re-used multiple times across different cohorts and or programmes – this will include the task title, description, criteria, start and end date, and any supporting documentation.

   Note: Assessment templates can be created by a **tutor/assessor** or a **centre manager**. An assessor only sees their templates and any created by the **centre manager**, not those created by another **assessor**, **a centre manager** can promote the **templates** to make them available to all users.

   [Click here to Access the Guide - Creating Assessment Templates (Online PDF)]()

If you require support with this stage, please contact the Digital Education Team
digitaleducation@lincoln.ac.uk

5. Create Assessment/Activity Plans (as required). If **Programme Teams** are using predefined **assessment templates**, they may also use an **Activity Plan** to group multiple assessment together, based on programme, to afford the ability of assigning multiple assessments to all learners in one action.

   Click here to Access the Guide - Creating Assessment Templates (Online PDF)

   Note: **Activity Plans** can contain both assessments created in the '**Assessment Templates**' section, and ad-hoc assessments created at the time of the **Activity Plan** creation. If assessments are likely to be used across multiple **Activity Plans**, it may be beneficial to pre-create these in the '**Assessment Templates**' area.

6. Review Look Up Tables (Timesheet and Learning Journal Categories). **Programme Teams** who have **Centre Manager** access will need to ensure that the correct **timesheet categories** and learning journal categories have been created. When a learner creates a **timesheet** or **learning journal** entry, to record their placement attendance or reflect on their practice, they are required to give a category, for indexing purposes and to allow the assessor to track how their time is being spent – particularly if this is **off-the-job**.

   Timesheet categories can be created as either:
   - **Induction** - This can be used to categorise the time spent on inducting the learner onto their apprenticeship.
   - **Off-the-job** - When selecting this timesheet category, the off-the-job checkbox will automatically be ticked.
   - **Learning activity** - Displayed when creating learning activities in the "Learning Journal".

   Click here to Access the Guide - Creating Timesheet Categories (Online PDF)

   Note: **Look up tables** can only be created and edited by a user who has **centre manager** access, if you require support with this stage, please contact the Digital Education Team digitaleducation@lincoln.ac.uk

Stage 3 - User Creation

1. Create Assessor / Tutor Accounts. **Programme Teams** with **User Manager** access should begin by creating the **Tutor/Assessor** accounts in One File, in order to create these accounts you will need to capture:
    - First and last name.
    - Primary email address.
    - Target caseload of students (if applicable).

Click here to Access the Guide - Creating Accounts and Distributing Passwords (Online PDF)

Note: Upon creation of the **Tutor/Assessor** account you will be presented with login credentials on-screen, that you can copy and paste into your own personal email to the member of staff, or you can send login details by navigating to the user's Account tab and clicking on the email password button.

2. Create Placement Locations. **Programme Teams** with **User Manager** access should create the **placement locations** for all apprentices, if these are not yet known, a default placement location can be used to allow the team to continue creating user accounts. To create a **placement location** you need to capture and provide the:
    - Workplace name.
    - Address.
    - Contact name (management if required)

Note: You will have the opportunity upon creation to assign existing work-based mentors (**employers**) and **observer** accounts in the One File system to the placement location.

3. Create Employer Accounts. **Programme Teams** with **User Manager** access should create the **employer** accounts for all apprentices, the **employer** who may be referred to as a mentor, is the account type that allows for **interactive access to the students portfolio**. It is important to note that the **employer** account does have the ability to sign the tripartite reviews, whereas the **observer** role does not. To create an **employer** account you need to capture:
    - First and last name.
    - Primary email address.
    - Workplace or placement location.

Upon creation you could assign the **employer** to individual **learners**, as you are likely to have not created **learner** accounts yet, this will be done using the bulk import process and can be skipped at this stage.

Note: You will have the option to '**automatically grant access rights to all learners currently under this workplace**' – we advise you **do not tick this option**, as **workplaces/placements** are likely to have multiple **employers** with access to different **learners** overtime.

4. Create Observer Accounts (if applicable). **Programme Teams** with **user manager** access have the ability to create **observer** accounts for apprentices, the **observer** has read only access to the **learner portfolio** and has no rights to edit any areas. To create an **observer** account you need to capture:
    - First and last name.
    - Primary email address.
    - Workplace or placement location.

Note: There is nothing preventing the **placement location** or **workplace** of the **observer** being different to the **employer**; the **observer** may be part of the University of Lincoln instead of the apprenticeship company, therefore you these locations do not have to match for your programme in One File.

5. Create Learner Accounts (Bulk Import). **Programme Teams** with **User Manager** access have the ability to **Bulk Import Learners**, this can be completed using CSV (comma-separated value) file and is best done once all of the required information for a **learner** account has been created. In order to create a **learner** account using the bulk import process, there are three stages to complete, and they require different information:

Stage One – Uploading the CSV File to One File

- First and last name.
- Primary email address.
- MIS Value *(Optional).*
- Ethnicity Code *(Optional).*
- Date of Birth.
- Date Registered.

Upon uploading the CSV file you will be asked by One File to confirm that the column headings in your document match the column headings in One File, you will need to select the correct data field from the drop-down box. You can find guidance on how to do this on the link below.

Click here to Access the Guide - Bulk Importing Learners (Online PDF)

Click here to Access the One File Template - Bulk Import Learners CSV (File Download)

Stage Two – Setting the Additional Details

Following the initial import, One File will present you with a table of all the **learner** accounts that you have presented in the CSV document, you will now be able to set the additional details, these include:

- Default Assessor.
- Cohort or Group.
- Placement Location.
- Framework Template.
- Eportfolio Start Date.

This can be done in bulk by selecting the options from the drop-down lists at the top of the page. Alternatively, you can edit each **learner** individually by selecting a different option on the row of the learner.

Note: Learner accounts can be created individually, as of and when required, to do this locate the **Learners** tab of the **Users menu** and click **Create Learner**. When creating an individual **learner** account, you will have the opportunity to enter: first and last name, primary email, date of birth and registration date, national insurance and unique learner number, their **tutor**, **cohort**, **workplace**, **framework template** and start date.

Stage Three – Completing the Import and Additional Information

Upon successful creation of the learner accounts, the last step involves navigating to each of the learner's account in One File individually and importing the final pieces of information relevant to the apprenticeship. This information can be added in the Episode or the Episodes tab.

Access the **Episode** Tab by going to **Users**, **Learner Episodes** and clicking **Episode** on the relevant learner:

- Assign Total Contracted Hours (found in the Episode tab)
- Learner Status (found in the Episode tab) *(Optional).*
- Special Requirements and Disability Information (found in the Episode tab) *(Optional).*

Access the **Episodes** Tab by going to **Users**, **Learners** and clicking **Episodes** on the relevant learner:

- Unique Learner Number (found in the Episodes tab)
- National Insurance Number (found in the Episodes tab)

You will also need to distribute login details to the learners once you have completed their account creation, this can be done by locating to the Learner's Account page and selecting Email (to automatically send a new email or password) or Reset (to present a password on-screen for you to copy and distribute accordingly).

6. Assign Employer and Observer Accounts. **Programme Teams** with **User Manager** access should now assign any **Employer** and **Observer** accounts to the **learners** that have been bulk imported, **employers** have the ability to sign **Reviews** and provide feedback to some assessments. **Observers** are able to read the portfolio only. This process can be automated based on the allocation of a placement location, however where there are multiple mentors at one organisation, this remains a manual process.

To assign **Employer** and **Observers** to a **Learner**, we advise you complete the following steps to ensure that the portfolio system is setup correctly:

1. Navigate to the **Users tab** of One File.
2. Select the **Learner/Student Episodes/Details** from the options presented.
3. Click the **Account** button next to the corresponding **Learner** or **Student**.
4. Next locate the '**Access Accounts' tab** from the **Learner/Student's Account** page.
5. Ensure that the **employer** and **observer** are **ticked correctly**, and press **save**.

Note: you must ensure that you populate the default mentor drop-down box to ensure that the employer is listed as a signature on the **Reviews** and any **Forms**.

7. Assign Activity /Assessment Plans (as required). As described in Stage 2 Step 5, **Tutor/Assessor** users in a One File centre can produce and allocate predefined **assessment templates**, in the form of individual assessments and or in **Activity Plans** to group multiple assessment together. Please see the S2S5 for details on how to create these.

- **To assign an Assessment Template**: Locate the **Forms & Templates tab** of your One File homepage and click the **Assessment Templates icon**. Locate the Assessment Template that you would like to assign and click the Assign to Students button in the options column. You can then filter students by **cohort**, and select which students should receive the assessment, students who have already received the plan can receive it again if the assessment is duplicated. Ensure that the assessment is started by the **tutor** and sign to confirm that you are happy with all the details entered.

  Click here to Access the Guide - Assessment Templates (Online PDF)

- **To assign an Activity Plan**: Locate the **Forms & Templates tab** of your One File homepage and click the **Activity Plan icon (lightbulb)**. Locate the Assessment Template that you would like to assign and click the Assign to Students button in the options column. You can then filter students by **cohort**, and select which students should receive the assessment, students who have already received the plan can receive it again if the assessment is duplicated. You will need to enter the Start and Due date for each task listed in the plan, those with dates in the future will not show on the student portfolio upon the student accepting the plan. Sign to confirm that you are happy with all the details entered.

  Click here to Access the Guide - Activity Plan Templates (Online PDF Support Resource)

  If you require support with this stage or have assigned a plan incorrectly, please contact the Digital Education Team digitaleducation@lincoln.ac.uk

8. Distribute Account Passwords. **Programme Teams** with **User Manager** access should now distribute passwords to all user accounts once the relevant user creation steps have been completed, **there is no way to send passwords en masse**, and this remains a manual process for each individual user.

There are two options when distributing login details to users and they are as follows:

- **Reset** – This option will provide you with an onscreen message containing the username, password, and information about logging in, this can be copied and pasted into an email that you are sending to the user directly, for example with your own information about the programme and or system.

- **Email** – This option provides the same information as above, however this will automatically send an email from One File to the user in question, you will not see the password, but you will receive confirmation that an email has been sent to the primary email address.

In order to access the login details distribution options, locate the **Users tab** in One File and select the relevant **sub-tab (learners, employers, observers, tutors etc)**, click on the **Account button** for the relevant user and locate the **Email** or **Reset** button accordingly.

Click here to Access the Guide - User Creation (Online PDF Support Resource)

Stage 4 – Portfolio Archiving and Downloading

1. Review Active Learner Accounts to Identify Portfolios at Completion. **Programme Teams** should regularly review their **learner/student accounts** that are active within One File. When identifying whether learners have completed their apprenticeship, programme teams will have a clearer and more accurate picture of the individual situation of each learner on their apprenticeship.

   However, you may benefit from understanding about the **Learner View report** in One File, which can provide you with an overview of your apprenticeship, particularly where there are discrepancies between students and their status in the apprenticeship.

One File Reports (Learner View Report)

- Access this report by going to the **Reports tab**, navigate to the **Learner Database Reports (Centre Reports)** section, and select the **'Learner View' report**. This report can be customised and exported.
- By entering the **Select Columns menu**, you can choose to present data for a variety of fields, including:
    - Learner Name.
    - Main Learning Aim.
    - Learner Status.
    - Date Registered.
    - Cohort.
    - Anticipated Completion Date.
    - Eportfolio Completion Date.
    - Learner Last Activity.
    - Archive status.
- You can click the **Export to Spreadsheet** button to download an Excel file with the report information.

2. Assign 'Completed' Learner Status. **Programme Teams** with **User Manager** can update the **Learner Status** to reflect the status of their engagement with the apprenticeship, for example **completed**, **withdrawn**, **break in learning** or a **custom value**. The status will now be displayed on the **learner's portfolio** and in the **Learner View Report**.

   To change a **learner status**, follow the steps below:

   1. Navigate to **learner portfolio**.
   2. Click **Episode** tab.
   3. Locate **Learner Status**.
   4. **Select the status** from the drop-down list.
   5. Click **Save**.

3. Archive Learner Episode to Render Portfolio Read-only. **Programme Teams** with **User Manager** access should **archive** learner portfolios when they have completed their apprenticeship **to prevent any new changes from being made**. Students can still access their portfolio at this time, you need to **suspend** their account to prevent access.

   To **archive a learner's portfolio**, follow the steps below:

   1. Access the **learner's portfolio**.
   2. Click on **Learning Aims** located at the top of the page.
   3. Scroll down to the **Archive** heading.
   4. Add a **tick next to the Archive** this episode option.
   5. Click **Save**.

Note: You can also **archive an entire cohort** where all students have completed their apprenticeship, to do this locate the **Cohorts tab** from the One File homepage, select **Edit** on the relevant **cohort** and choose **Archive**.

4. Download Learner Portfolio and place in Storage. **Programme Teams** with **User Manager** access should **download the Learner's portfolio** and place in the designated storage area upon successful completion or complete withdrawal from the programme. You should download a **'Portfolio Showcase'** to ensure all assessments are included.

   To request a **Portfolio Showcase**, follow the steps below:

   1. Navigate to the **learner's portfolio**.
   2. In the **Information and Options** section, click **Manage**.
   3. Click **Portfolio Showcase**.
   4. Tick the **Assessments** you want to use.
   5. Click **Request New Download**.

   Click here to Access the Guide - Downloading a Portfolio (Online Support Resource)

   If you require support with this stage, please contact the Digital Education Team digitaleducation@lincoln.ac.uk

5. Update Anticipated Completion Date for Learning Aim and Units. **Programme Teams** with **User Manager** access can update the **anticipated completion date** for **learning aims and units**, this will adjust the percentages that you see on a learner's portfolio (particularly **Current Progress** and **Target Progress**).

   To update the **anticipated completion date** for a learner:

   1. Navigate to the **learner's portfolio**.
   2. Select the **Learning Aims** and/or **Units sub-tabs** of the portfolio.
   3. Adjust the **Anticipated completion date** as necessary.
      a. **You need to complete this step for both Learning Aims and Units to avoid any discrepancies.**

   Click here to Access the One File Guide - Learning Aims Tab (Online Support Resource)

   Click here to Access the One File Guide - Units Tab (Online Support Resource)

   Note: This is not a mandatory step, you may choose not to do this, so that the initial anticipated completion date remains clear when the portfolio is being assessed or reviews by additional parties.