

# W E L C O M E

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To your employer  
handbook



# Welcome to OneFile

Supporting over 600,000 users worldwide, OneFile is the UK's leading eportfolio for learning and development – and winner of the 2017 Queen's Award for Innovation.

As an employer, you'll be able to view your employees' progress, reviews and assessments. Dependent upon the access you've been granted, you can also interact with the system by entering journal entries, signing off reviews and starting assessments.

This guide will provide you an overview of the various features you can use as an employer, and provide you with tips and tricks to make the most of OneFile.

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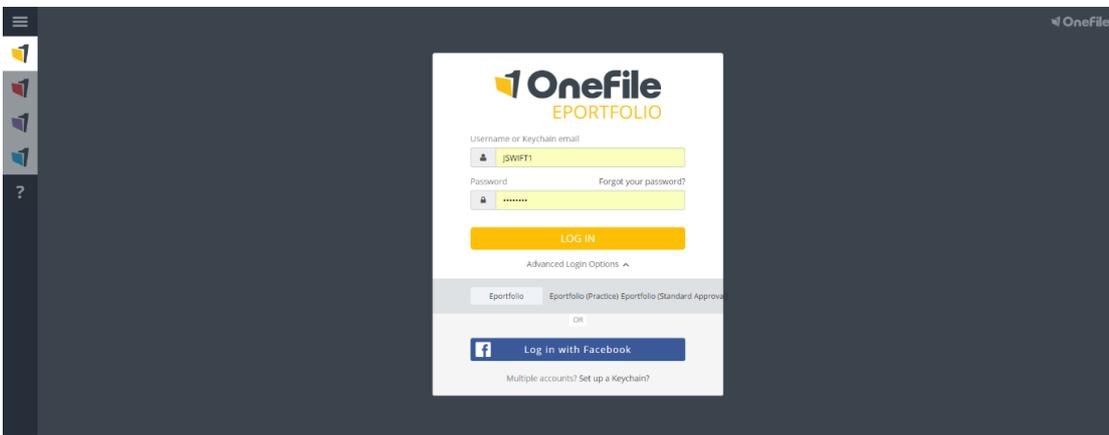
## Getting started with OneFile

This account will allow you to view progress, complete reviews and ILPs, as well as fully engage in communicating with the assessment team. Your account will be created by a training provider.

### Logging in

You'll be issued with a username and password to access your account. These details are case sensitive and must be typed exactly as displayed.

Log in to OneFile by visiting [login.onefile.co.uk](http://login.onefile.co.uk) or your company portal.



### Lost your password? No problem!

If you've forgotten your password, just click "Forgot your password?" on the log-in screen.



Username or Keychain email

Password [Forgot your password?](#)

**LOG IN**

Advanced Login Options ^

Then, enter the email address associated with your account and click "Continue". A new password will now be produced and sent to your registered email address.

### Reset Password

Please enter your email address and we'll send you a link to reset your password

[Continue](#) [Return to log in](#)

## Getting to know the homepage

1. Filter by class
2. Select a learner
3. Learner dashboard filtering options
4. View main learning aim
5. Actual progress = green / target progress = red

The screenshot shows the 'Learner Dashboard' interface. At the top, there are two dropdown menus: 'Any class' (callout 1) and 'Select a learner...' (callout 2). Below these is a 'Filter Learners' section (callout 3) with a 'Class' dropdown, a 'Name' input field, and checkboxes for 'Show my learners only' and 'Show archived learners'. The main part of the dashboard is a table with columns: Learner, Main Learning Aim, Progress (Target)%, Anticipated Completion Date, Target Deviation, Next Review Date, Units Signed Off, Tasks, and Portfolio Options. Three learner rows are visible: Gemma Hall (54% progress, -16% deviation, red review date), Margaret Brooks (37% progress, -5% deviation, green review date), and Fred Foster (16% progress, -2% deviation, green review date). Callouts 4, 5, 6, and 7 point to the Main Learning Aim, Progress bar, Target Deviation, and Next Review Date columns respectively. Callout 8 points to the learner details for Gemma Hall. Callouts 9 and 10 point to the Target Deviation and Units Signed Off columns respectively.

Learner	Main Learning Aim	Progress (Target)%	Anticipated Completion Date	Target Deviation	Next Review Date	Units Signed Off	Tasks	Portfolio Options
<b>Hall, Gemma</b> Episode Name: GHALL4 L3 Health & Social Care Offline	City & Guilds Level 3 Diploma in Health and Social Care (Adults) for England - Generic (QCF) (Jan 2011)	54% (16%)	30/05/2019	-16%	22/02/2018	0/16	1	Assessments Plans Gap Analysis
<b>Brooks, Margaret</b> Episode Name: MBROOKS1 Sports Science L1 Offline	1st4sport Level 1 Award in Coaching Football (QCF) (Sept 2010)	37% (5%)	07/06/2019	-5%	01/04/2018	0/8	1	Assessments Plans Gap Analysis
<b>Foster, Fred</b> Episode Name: FFOSTER1 Sports Science L1 Offline	1st4sport Level 1 Award in Coaching Football (QCF) (Sept 2010)	16% (2%)	30/06/2019	-2%	01/04/2018	0/8	1	Assessments Plans Gap Analysis

6. View next scheduled review
7. Tasks with the learner
8. Learner details
9. Ahead of target (green), on target (amber), behind target (red)
10. Number of units signed off

## Getting to know the learner dashboard

- 1. Profile** - contains CV, contact details and learner status.
- 2. Activity** - view the activity of individuals who have accessed the learner's portfolio
- 3. Evidence** - list of evidence which has been uploaded to the eportfolio
- 4. Plans** - view plans created for the learner by the assessor (contains assessment tasks with target dates)
- 5. Assessments** - list of outstanding tasks/details of who the task is currently with requiring attention



- 6. Download portfolio** - gives learners the option to export their portfolio
- 7. Expert witnesses** - list of witnesses linked to the learner's account
- 8. Timesheets** - list of timesheet entries for the learner against associated activities
- 9. Gap analysis** - list of witnesses linked to the learner's account
- 10. Journal** - area within the portfolio where users can detail information about the learner and their learning journey
- 11. Learning journey** - graph charting the learner's progress since they started learning
- 12. Progress** - view the learner's actual progress and compare against their target progress
- 13. Reviews** - view the learner's scheduled reviews and access any completed reviews
- 14. Tasks** - list of outstanding tasks with their individual target dates

Please note: centres may have changed the titles of each icon, however the icon will remain the same. If you can't access any of the icons, please contact your training provider. This is due to the permissions you've been granted.

## Key areas

**Gap analysis:** the gap analysis shows you the areas of performance and knowledge the learner still needs to complete.

[CU828] Support customers using on-line customer services (Progress 61%) ▼

Select criteria: All None

[CU828.1] Establish the type and level of support their customer needs to achieve on-line customer service

Select	Assessment Criteria	Supporting Evidence	Progress
<input type="checkbox"/>	1.1 ensure that they are up-to-date and with the on-line services that their customers use	<a href="#">WT1</a>	<span style="color: green;">■</span>
<input type="checkbox"/>	1.2 identify what the customer is trying to achieve and what they are having difficulties with	<a href="#">OB1</a>	<span style="color: orange;">■</span>

[CU828.2] Support on-line customer service in conversation with their customer

Select	Assessment Criteria	Supporting Evidence	Progress
<input type="checkbox"/>	2.1 explore the on-line customer system in order to develop their own knowledge and skills in its use	<a href="#">RA10</a>	<span style="color: green;">■</span>
<input type="checkbox"/>	2.2 step through the screen sequence with their customer whilst allowing them to operate the system for themselves		<span style="color: red;">■</span>
<input type="checkbox"/>	2.3 address their customer in an understanding and supportive manner	<a href="#">RA10</a>	<span style="color: green;">■</span>
<input type="checkbox"/>	2.4 explain to their customer why certain steps are required in the process		<span style="color: red;">■</span>

The number of boxes in the progress section shows how many times the criteria needs to be met. Red: criteria has not yet been covered by an assessment. Amber: the criteria has been covered by an assessment, which hasn't yet been completed. Green: the criteria has been covered by an assessment that has been signed-off.

The supporting evidence column provides a link to the assessment that the criteria meets.

## Progress

The progress page displays the progress for each unit the learner is working towards.

Overall Progress: 38%			<input type="checkbox"/> Include pending assessments	<input type="checkbox"/> Show detailed view
EDI Level 2 Certificate in Customer Service (QCF) (Aug 2010)	Unit Progress	Actual		
CT179		28%		
CU854		0%		
EDI Level 3 NVQ Diploma in Customer Service (QCF) (Aug 2010)	Unit Progress	Actual		
CU798		33%		
CU801		95%		
CU817		88%		
CU828		61%		
CU838		24%		
CU839		0%		
CU844		0%		

In the top-right corner, there are options to include pending assessments and to show a detailed view.

EDI Level 2 Certificate in Customer Service (QCF) (Aug 2010) [50092352]	GLH (115)	Credit Value (13)	Unit Progress	Actual	Target	Start Date	Anticipated Completion Date	Learner Signed Off	Assessor Signed Off	IV Signed Off
[CT179] Delivery of Effective Customer Service [J6001003]	50	6		28%	100%	10/03/2017	10/09/2017	Not signed off	Not signed off	Not signed off
[CU854] Supporting the Customer Service Environment [J6000658]	65	7		0%	100%	10/03/2017	10/09/2017	Not signed off	Not signed off	Not signed off
EDI Level 3 NVQ Diploma in Customer Service (QCF) (Aug 2010) [50088233]	GLH (306)	Credit Value (46)	Unit Progress	Actual	Target	Start Date	Anticipated Completion Date	Learner Signed Off	Assessor Signed Off	IV Signed Off
[CU798] Process information about customers (A6) (Level 2) [H6011215]	33	5		33%	64%	10/03/2017	10/09/2018	Not signed off	Not signed off	Not signed off
[CU801] Go the extra mile in customer service (A9) (Level 2) [M6011220]	40	6		95%	77%	10/03/2017	10/06/2018	Not signed off	Not signed off	Not signed off
[CU817] Apply risk assessment to customer service (C6) (Level 3) [D6011519]	67	10		88%	61%	10/03/2017	10/10/2018	Not signed off	Not signed off	Not signed off
[CU828] Support customers using on-line customer services (D4) (Level 2) [H6011540]	33	5		61%	96%	10/03/2017	10/03/2018	Not signed off	Not signed off	Not signed off

Showing the detailed view will display the target progress for the learner as well as other information about each unit, including the unit title. The green bar represents the actual progress and the red bar represents the target progress.

## Reviews

If the Centre has the relevant settings enabled, you'll be required to sign reviews for your learners. You'll receive a task which looks like the example below.

0 4

Emily Armstrong  
Employer

**TASKS**

Set 03/07/2017 Due 02/08/2017

Please sign the review for Gemma Hall dated 19/06/2017

You can click the task to be taken straight to the review in question, where you will then see the information which has been completed by the learner and assessor.

The first section displays the completed progression for each units including progress since their last review

Unit Progression between Reviews			
Unit (click to read)	Progress/ Grade as 27/02/2018	Anticipated Completion Date	Change since Last Review(%)
[CT179] Delivery of Effective Customer Service	28%	10/09/2017	+ 28 %
[CU854] Supporting the Customer Service Environment	0%	10/09/2017	--
[CU798] Process information about customers (A6) (Level 2)	33%	10/09/2018	+ 20 %
[CU801] Go the extra mile in customer service (A9) (Level 2)	95%	10/06/2018	+ 9 %
[CU817] Apply risk assessment to customer service (C6) (Level 3)	88%	10/10/2018	+ 88 %
[CU828] Support customers using on-line customer services (D4) (Level 2)	61%	10/03/2018	+ 61 %
[CU838] Demonstrate understanding of customer service (F3) (Level 3)	24%	10/09/2017	+ 24 %
[CU844] Build and maintain effective customer relations (B15) (Level 4)	0%	10/07/2018	--
<b>Overall</b>	<b>38%</b>	<b>10/10/2018</b>	

You'll may then be required to leave feedback for the learner.

Feedback & comments

Feedback to Learner:

Tahoma, ... 14px

Well done Gemma. I'm really pleased with your recent performance at work and can see the value your apprenticeship is providing

Words: 21 Characters: 127

Create task to acknowledge this feedback

Finally, you are required to sign the review, which will complete the task.

Declarations			
Signed by	Name	Signed	Date
Learner	Gemma Hall	<input checked="" type="checkbox"/>	27/02/2018
Assessor	Trish Edwards	<input checked="" type="checkbox"/>	27/02/2018
Employer	Emily Armstrong	<input type="checkbox"/>	27/02/2018

NOTE: Centres will often change the name of the review as well as the displayed fields.

## Individual learning plans

As an employer, you may be required to sign off the learner's individual learning plan. A task will be sent both to your OneFile account and your registered email address.

The ILP will display key components of the learner's journey, including actual and planned tasks, as well as any timesheet and review information. To sign off the ILP, scroll down to the bottom, tick in the yellow box and select accept.

## Learner dashboard

As an employer, you'll also be able to access the learner's dashboard. If you have more than one apprentice this is a great tool to provide an overview of their performance.

Learner Dashboard									
Filter Learners									
Class: <input type="text" value="Any class"/>									
Name: <input type="text"/>									
<input type="checkbox"/> Show my learners only									
<input type="checkbox"/> Show archived learners									
Learner	Main Learning Aim	Progress (Target%)	Anticipated Completion Date	Target Deviation	Next Review Date	Units Signed Off	Tasks	Portfolio Options	
 <b>Hall, Gemma</b> Episode Name: GHALL4 L3 Health & Social Care <span>Offline</span>	City & Guilds Level 3 Diploma in Health and Social Care (Adults) for England - Generic (QCF) (Jan 2011)	<div style="width: 54%;"><div style="width: 54%;"></div></div> 54% (16%)	30/05/2019	-16%	22/02/2018	0/16	1	<a href="#">Assessments</a>	<a href="#">Plans</a>
 <b>Brooks, Margaret</b> Episode Name: MBROOKS1 Sports Science L1 <span>Offline</span>	1st4sport Level 1 Award in Coaching Football (QCF) (Sept 2010)	<div style="width: 37%;"><div style="width: 37%;"></div></div> 37% (5%)	07/06/2019	-5%	01/04/2018	0/8	1	<a href="#">Assessments</a>	<a href="#">Plans</a>

Each of the headings can be filtered by selecting the main headings. Or you can simply click on the learner's name to open their portfolio.

## Support and help guidelines

If you require any support while using OneFile, you can contact your training provider or OneFile directly on 0161 638 3876 or email [support@onefile.co.uk](mailto:support@onefile.co.uk)

Or alternatively select the '?' icon on the right hand side of the software, which will display page specific user guides.

### Help

#### Video Guides



OneFile Eportfolio - User Interface

Onefile  
User Interface

#### User Guides

- Employer Induction Guide

#### Need help with something else?

- Search all user guides
- Book free online training
- Contact OneFile

## Glossary

### End-point assessment

Within apprenticeship standards, a learner is not deemed competent until they have passed their end-point assessment. Instead of being assessed continually throughout their course, all apprentices will now have to complete an end-point assessment.

### Evidence

The evidence area within OneFile is a storage area which displays items uploaded to the portfolio. Learners or tutors can upload a huge variety of different documents types including, Word, PowerPoints, Excel, images, video and audio. Any attachments stored within this area could already be attached to an assessment, or could simply have been uploaded pending allocation to an assessment.

### Gap analysis

Under the progress tab in OneFile, you will see the option to view the gap analysis. This area displays all the outcomes currently outstanding. It will also display any outcomes which have been set, but are currently pending with either the tutor or learner.

### Gateway to end-point assessment

Within apprenticeship standards, the gateway provides an opportunity for all parties – employer, learner and training provider – to agree that the learner is prepared for their end-point assessment. This area can also be used to record mock assessments prior to completing their final end-point assessment.

### Individual learning plans

Individual learning plans document the learner's starting point as well as their aspirational targets and entire learning journey. These are regularly updated to reflect achievement and completion of targets.

### Journal

The journal area of OneFile is a vital area for all users to reflect on the learning journey. It can be used to record any learning tasks or notes, for which time can also be allocated to demonstrate off-the-job learning.

## Glossary

### Off-the-job learning

The requirement for at least 20% off-the-job training is a core and well-established principle of apprenticeships. The 20% threshold is the minimum amount of time that should be spent doing off-the-job training during an apprenticeship. This applies to apprenticeship frameworks and standards at all levels. The off-the-job training must be directly relevant to the apprenticeship and could include the following:

- Teaching theory (such as lectures, role playing, simulation exercises, online learning or manufacturer training)
- Practical training (such as shadowing, mentoring, industry visits, competitions, learning support and time spent writing assessments/assignments)

Within OneFile, the journal and timesheet areas can be used to record any off-the-job training.

### Progress

Progress within OneFile can be measured against all components: formal qualifications, bespoke standards such as an induction module, short courses etc. OneFile records both target progress and actual progress. Target progress is based upon the start and end date of a module or unit. If a learner hasn't started a module by the planned start date, their target progress will reflect this.

### Reviews

Reviews are an integral part of the apprenticeship journey. These regular meetings conducted between the learner, employer and training provider allow all parties to discuss progress, targets and future learning.

### Tasks

Tasks within OneFile can be used for many things, such as a task reminder to record any off-the-job learning, or a task to complete an assignment which meets outcomes within their qualification. Tasks are usually set by the tutor or assessor with a specific outcome in mind and a set deadline. However, depending on your setup, both learners and employers can also create tasks (assessments).

## FAQs

### [I can't log in to OneFile. What should I do?](#)

Firstly, please check your internet connection. If you are connected to the internet, please check the username and password you are using are both correct. If you're still unable to log in, please click 'Forgot password' or contact your centre manager to reset your password.

### [Who is the centre manager?](#)

Your centre manager will work for the training provider you're working with. They'll be able to access OneFile to create learners, allow employer access, link learners to employers, remove access to accounts and archive learners.

### [I can't see an employee in my account. What should I do?](#)

Please ensure you remove any filters from the search box. If all the filters are clear and you still cannot see your employee, please contact your centre manager to request access to the employee.

### [Can I record in the journal?](#)

Yes - as an employer you can select the learner and enter a journal entry against them. However, you won't be able to allocate time against a journal entry. If you would like the entry to be recorded against off-the-job training, please ask the learner to create the journal entry.

### [Can more than 1 person at our company access the employee's portfolio?](#)

Yes - just ask your centre manager to set up an additional employer account and allocate them to the employee's portfolio.

### [Once an employee completes their apprenticeship, will I still be able to access their portfolio?](#)

Yes, but you may need to change the search option to include archived learners.



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