

**ONEFILE  
EPORTFOLIO  
APP USER GUIDE**

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**ASSESSOR**

## OVERVIEW

Got no Wi-Fi? Working in a remote location? The OneFile eportfolio offline app is the answer.

With our new app, you can capture evidence and complete assessments, plans and reviews offline – any time, any where, on any device. Then when you're connected to the internet again, you can sync your work back to your online account and continue to use OneFile as normal.

It's simple, quick and convenient.

## USER RESTRICTIONS

You must have a registered OneFile **learner** or **assessor** account to use the app.

## DOWNLOADING THE APP

You can download our app on the following operating systems:

Apple (iOS) devices:



- Available on iOS 7.1 or later.
- Recommended on iOS 9 or later.

Android devices:



- Available on Android 4.4 or later.
- Recommended on Android 5 or later.

Windows devices:



- Available on Windows 10 PCs and tablets.

## LOGGING IN TO THE APP

To log in to the app for the first time, you must be connected to the internet. Every other time you use the app, you'll be able to log in offline.

To log in, enter your OneFile eportfolio login details.

When you've entered your details and logged in, the app will do an initial sync to gather your information from the online system.

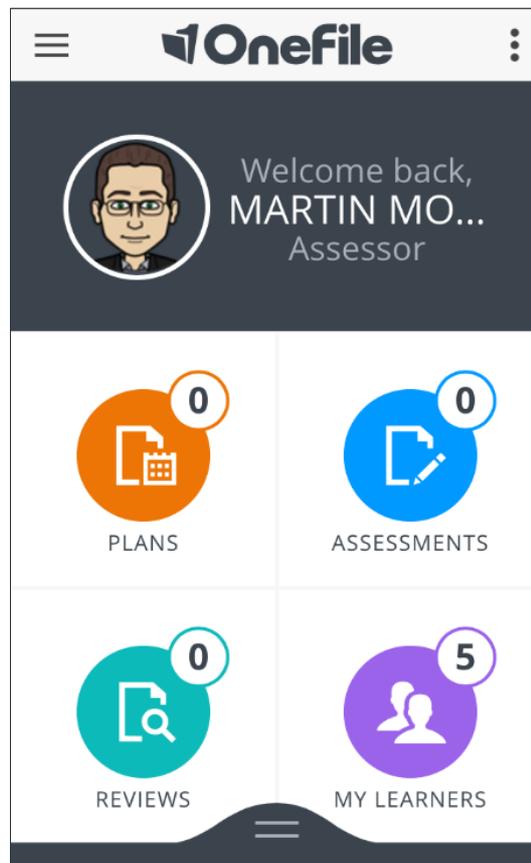
If this is the first time you've logged in, you can view useful information about the app. Swipe through the instructions, and when you're ready, tap the **OK, got it** link.

You'll now be taken to your homepage. You'll see this page every time you log in to the app from now on.

**Top tip:** Did you know you can use the app with any assessor and learner accounts you have on the practice area? If you do, make sure you select **practice** from the **advanced options** menu before clicking **log in**.

## HOMEPAGE

Your homepage gives you a full overview of your OneFile account. It displays how many plans, assessments and reviews you have pending, as well as how many learners are assigned to you.



You can swipe up from the bottom of the page to complete a centre sync and pull your centre details, templates and forms onto your device. More information on how to sync the app can be found in the 'Syncing Your App' section of this guide.

## MENU ICONS

The icon in the top-left corner of your screen (☰) helps you navigate around the app. To return to your homepage, click **home**. To view a list of the learners on your device, click **my learners**. To access the general evidence area, click **evidence**.

The icon found in the top-right corner of your screen (⋮) will provide you with quick access to **settings**, **support** and the option to **log out**.

The **settings** page lets you control what information is synced to your app. The app, by default, will only sync learners you're assigned to as a *Default Assessor*. If you're assigned to any of your learners as an *Additional Assessor*, *Learning Aim Assessor* or *Unit Assessor*, you can choose to sync those learners to your device if you wish.

Finally, you can regulate how much data you're syncing onto your device and help save storage space using **sync ranges**. Set specific date ranges for syncing completed reviews, assessments and plans to your device. For example, as default, the app only syncs scheduled reviews from 15 days ago up to 30 days in the future – if a review is outside that date range, it isn't synced to your device.

When you're connected to the internet, you can send a support enquiry using the **support** option if you have a query or need some help.

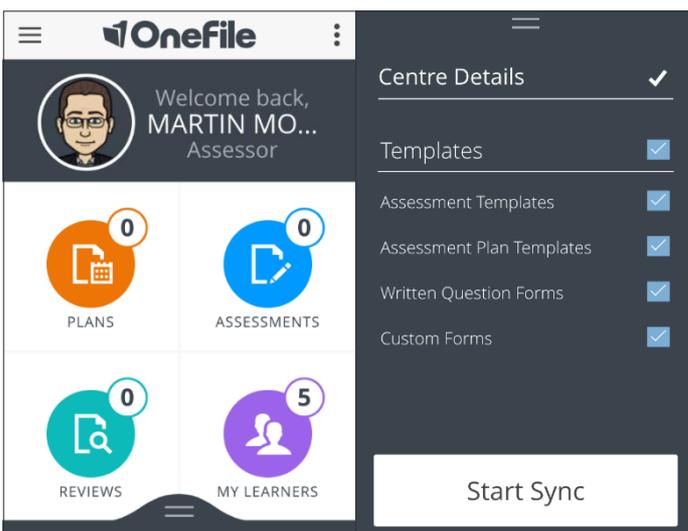
## WHAT DOES 'SYNCING' MEAN?

'Syncing your device' means that the information stored on your app and desktop is shared and up-to-date.

For example, if you create an observation on the website to start as the assessor, it won't appear on your app. After completing a sync, the observation will be available for you to start on the app. When you finish the observation on your app, you can sync again to send your recorded evidence back to the website.

Please note, you must be connected to the internet to sync your app.

## CENTRE SYNC



A centre sync allows you to access new templates, written questions and custom forms that have been created on your OneFile website.

To complete a centre sync, swipe up from the bottom of your screen on your homepage. This will open up a sync menu so you can select which centre details you want to sync with your device. When you're ready, press the **start sync** button.

When your sync is finished, you'll see "You're all synced up". You can then click the **done** button to finish.

## BULK LEARNER SYNC

To see a list of all the learners on your app, go to your homepage and click on the **My Learners** icon.

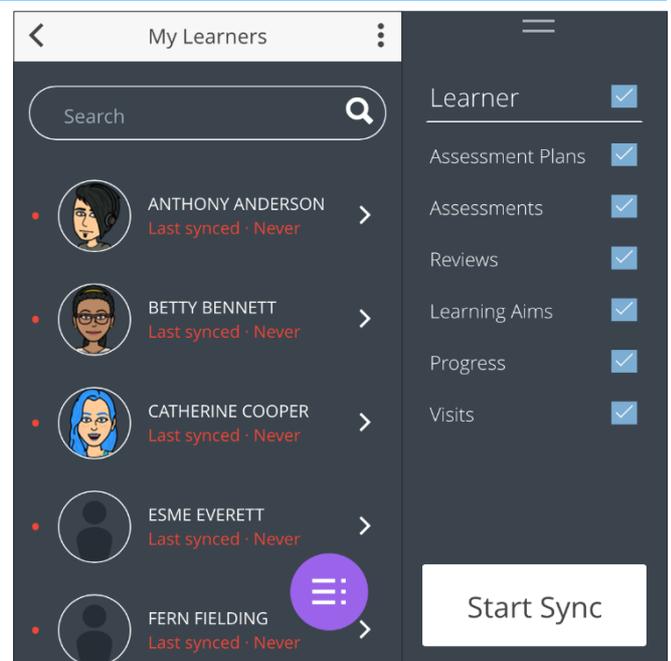
The initial sync only shares basic data, so you'll need to sync the learners you'll be working with. If a learner hasn't been synced, they will appear as "Last synced - Never". Until you sync these learners, you won't be able to work with them on the app.

To sync all your learners, tap the **context menu button** in the bottom-right corner of your screen and press **sync all**.

This will open up a sync menu plus some other additional options. Select the learners you want to include in your sync and press the **start sync** button.

If you have lots of learners, you might want to sync a class at a time using the **filter** option. **Press and hold down** to select more than one learner at once.

When your sync is finished, you'll see "You're all synced up". You can then click the **done** button to finish.



# Syncing the app

## INDIVIDUAL LEARNER SYNC

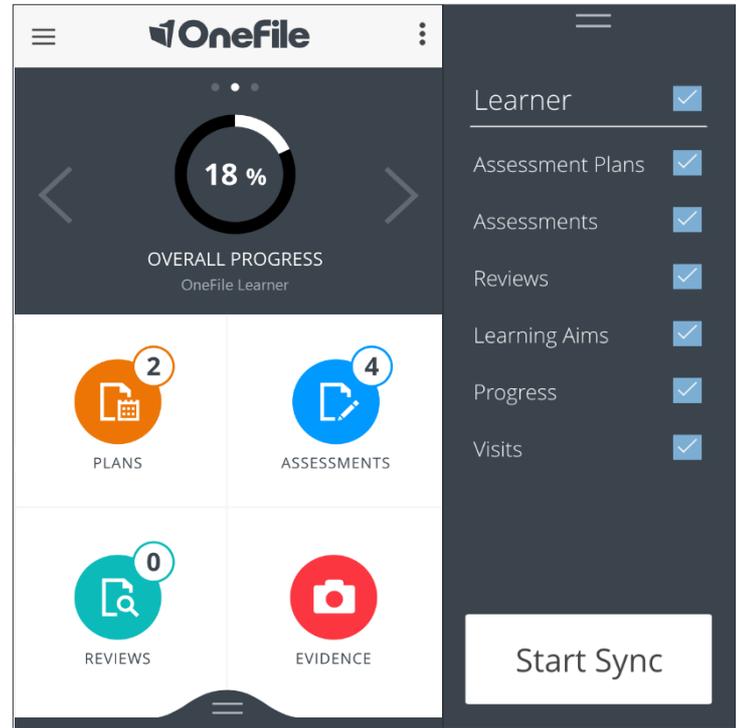
To sync one of the learners on your app, go to your homepage, click on the **My Learners**  icon and then click on the name of the learner you want to sync.

This will open the learner overview page, which looks very similar to your homepage. To sync the learner, swipe up from the bottom of your screen.

This will open up a sync menu to allow you to sync the learner's details to your device. Select which options you want to include in your sync and when you're ready, press the **Start Sync** button.

When the sync is completed, you'll then see a message confirming that "You're all synced up". You can then click the **done** button to finish.

You're now ready to use the app for this learner.



## OVERVIEW

The OneFile eportfolio app allows you to capture valuable evidence for use in assessments, such as audio, photo and video evidence. This can be recorded and stored in the app.

## GENERAL EVIDENCE AREA

The general evidence area is your main storage space for evidence. You can access this by tapping the hamburger menu icon (☰) in the top-left corner of your screen and pressing **Evidence**.

You can tap the **context menu icon** (+) in the bottom-right corner of your screen to add evidence:

- **Capture Video**
- **Take Photo**
- **Record Audio**
- **Import File**

After selecting or capturing your evidence, name it and click **Save**. It'll now be stored in your device.

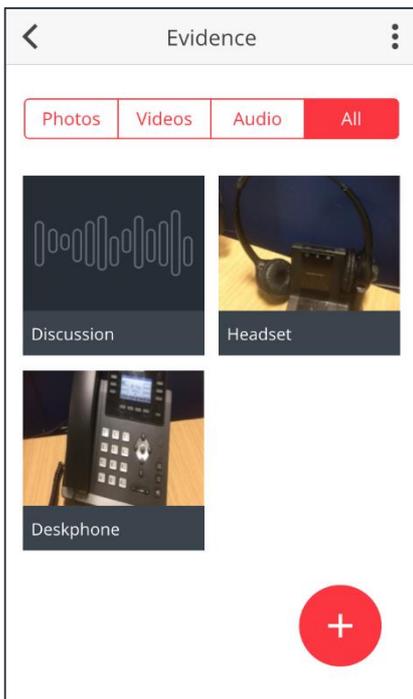
Hold your finger down on the piece of evidence you've captured to select it. Tap the **context menu icon** (☰) to see more options. You can choose to **Delete From Device**, **Upload** the evidence to your *Assessor Uploads* area, or **Move to Learner** (add to a learner's evidence area to be attached to an assessment, plan or review).

**Top Tip:** If you're having problems taking pictures or video with the app, please make sure that you've granted the app permission to access your camera and microphone under your device's settings.

## LEARNER EVIDENCE AREA

A learner's personal evidence area can be accessed by the steps below:

1. From your homepage, press the **My Learners** icon
2. Tap the name of the learner you want to access
3. Press the **Evidence** icon in the bottom-right corner of your screen



This area gives you the same options to capture your evidence. Unlike the general evidence area, any evidence in this area is specifically saved against this learner.

Hold your finger down on the piece of evidence you've captured to select it. If you tap on the **context menu icon** (☰), you can choose to **Delete From Device** or **Upload** the evidence to the learner's *Assessment Evidence* area.

**Top Tip:** If you use our app on a Windows devices, you'll notice that you don't have the option to record audio. To do this, you will need to use your device's in-built sound recorder and then import that recording into the app.

## OVERVIEW

Assessment plans help you plan tasks, activities and assessments, helping to track the audit trail of planned work. They can also be used to schedule your next visit with a learner.

Please note that you will need to sync your completed assessment plans to the live system for the tasks to be generated for your learners.

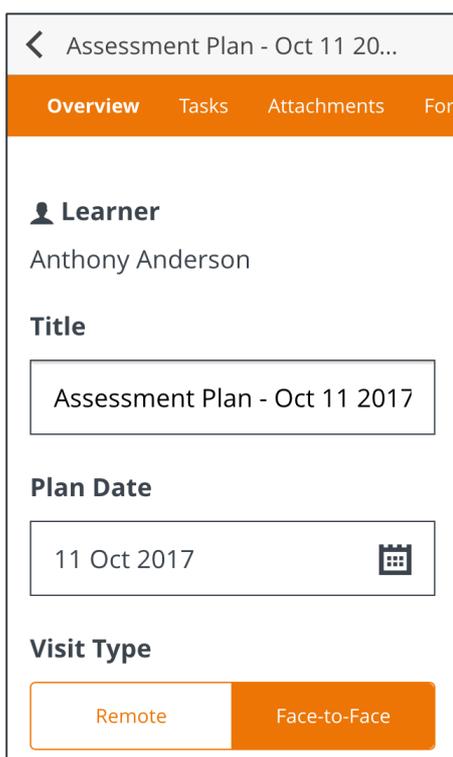
## ACCESSING ASSESSMENT PLANS

To start or complete an assessment plan, click on the **Plans**  icon on your homepage or learner's overview page.

You'll see two tabs at the top of the page: **Pending** and **Sync Ready**. Any assessment plans that are pending your action, if they've been created on the app or synced from the live system, will be found under the **Pending** tab. Any assessment plans that you mark to finish online or have signed will be under the **Sync Ready** tab, ready to sync up to the live system. To open an assessment plan that's already in this area, you can just tap on its name.

To create an assessment plan on the app, press the **context menu icon**  in the bottom-right corner of your screen and tap either **Create Plan** or **Create Plan from Template**, if you want to use an assessment plan template.

## SET YOUR TASKS, COMPLETE AND SYNC



The screenshot shows the 'Assessment Plan - Oct 11 20...' screen. At the top, there's a back arrow and the title. Below that is a navigation bar with 'Overview', 'Tasks', 'Attachments', and 'Forms'. The main content area has sections for 'Learner' (Anthony Anderson), 'Title' (Assessment Plan - Oct 11 2017), 'Plan Date' (11 Oct 2017 with a calendar icon), and 'Visit Type' (Remote and Face-to-Face buttons).

With your assessment plan now open, you can fill it in as you would on the live system.

**You can set your learners activity tasks and assessment tasks under the Tasks section, and if your centre uses any custom data forms in their assessment plans, these will appear under the Forms section.**

When you want to continue to the next section, just swipe right on your screen or tap the next section heading at the top of the page. As you move from one section to another, the app will auto-save your work. This means that if you need to come back to this plan later on, you can just click the back arrow and finish the plan when you're ready.

When you're finished, move on to the **Sign** section to mark your assessment plan as sync ready. Click on the **context menu icon**  in the bottom-right corner of your screen:

- **Finish Online** allows you to sync the assessment plan to the live system as it is, so you can make any necessary changes before signing it off.
- **Sign** allows you to sign the assessment plan.
  - Once you've signed, you can **also collect the learner's signature** by clicking on the context menu icon again. The learner can read through the plan and sign it too.

When you've marked your assessment plan as sync ready, exit by clicking the back arrow in the top-left corner of your screen. Your plan will now be marked as **Sync Ready**.

Under the **Sync Ready** section, click on the **Sync all**  button in the bottom-right corner of your screen to sync all of your completed assessment plans to the live system. Once this is done, those plans won't appear on your device anymore.

Alternatively, sync individual assessment plans by holding your finger down on one assessment plan to select it and press the **Sync**  button in the bottom-right corner of your screen.

## OVERVIEW

Assessments are used to record evidence, map it to criteria and store an audit trail of feedback and activity. It is usually good practice to create an assessment plan before starting any new assessments. However, in certain situations, you may need to create an unplanned assessment, such as observing the learner in the event of a fire alarm.

## ACCESSING ASSESSMENTS

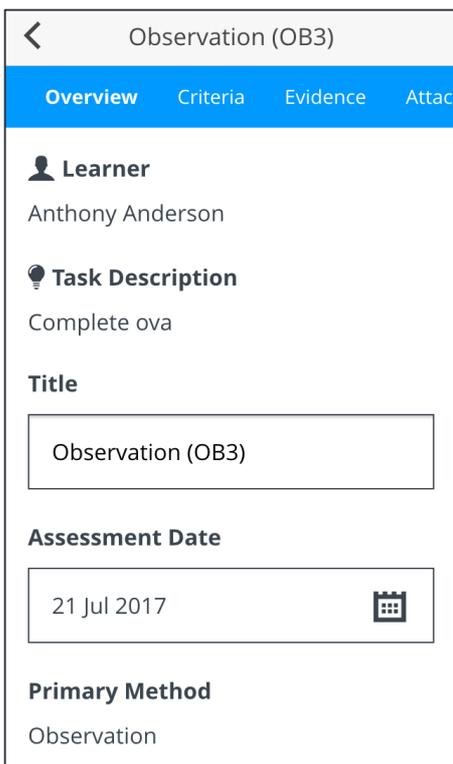
To start or complete an assessment, click on the **Assessments**  icon, which can be found on your homepage or on a learner's overview page.

Once in, you will see three tabs at the top of the page: **Upcoming**, **Pending** and **Sync Ready**. Any assessments that are pending your action (created on the app or synced from the live system) will be found under the **Pending** tab. Any future planned assessments will appear under the **Upcoming** section, and any assessments that you mark to finish online or have signed will be under the **Sync Ready** tab, ready to sync up to the live system. To open an assessment that's already in this area, you can just tap on its name.

To create an assessment on the app, press the **context menu icon**  in the bottom-right corner of your screen and tap either **Create Blank Assessment** or **Create from Template**, if you want to use an assessment template.

## REFERENCE YOUR CRITERIA, ATTACH YOUR EVIDENCE, COMPLETE AND SYNC

With your assessment now open, you're ready to get started!



The screenshot shows the 'Observation (OB3)' assessment overview screen. At the top, there is a back arrow and the title 'Observation (OB3)'. Below this is a blue navigation bar with four tabs: 'Overview' (selected), 'Criteria', 'Evidence', and 'Attachments'. The main content area is divided into sections: 'Learner' (Anthony Anderson), 'Task Description' (Complete ova), 'Title' (Observation (OB3)), 'Assessment Date' (21 Jul 2017 with a calendar icon), and 'Primary Method' (Observation).

In the Overview section, you can enter/adjust your assessment title and date, as well as set the assessment method(s).

**Set the assessment criteria in the **Criteria** section, enter written evidence in the **Evidence** section, record or attach any audio, photo or video evidence under the **Attachments** section and leave feedback in the **Feedback** section.**

When you want to move onto another section, just swipe left or right on your screen or tap the section heading at the top of the page. As you do this, the app auto-saves your work, so you can come back to it later on by clicking the back arrow to leave the assessment and finish it when you're ready.

When the assessment is finished, move on to the **Sign** section to mark your assessment as sync ready. Click on the **context menu icon**  in the bottom-right corner of your screen:

- **Finish Online** allows you to sync the assessment to the live system as it is, so you can make any necessary changes before signing it off.
- **Sign** allows you to sign the assessment.
  - Once you've signed, you can **also collect the learner's signature** by clicking on the context menu icon again. The learner can read through the assessment and sign it.

When you've marked your assessment as sync ready, exit by clicking the back arrow in the top-left corner of your screen. Your assessment will now be marked as **Sync Ready** tab.

Under the **Sync Ready** section, you can click on the **Sync all**  button in the bottom-right corner of your screen to sync all of your completed assessments up to the live system. Once this is done, they won't appear on your device anymore.

Alternatively, sync individual assessments by holding your finger down on one assessment to select it and pressing the **Sync**  button in the bottom-right corner of your screen.

## OVERVIEW

The OneFile eportfolio offline app gives you the ability to schedule, start and complete reviews for your learners. This allows you to see an overview of your learner's progression and development and provide feedback.

## ACCESSING REVIEWS

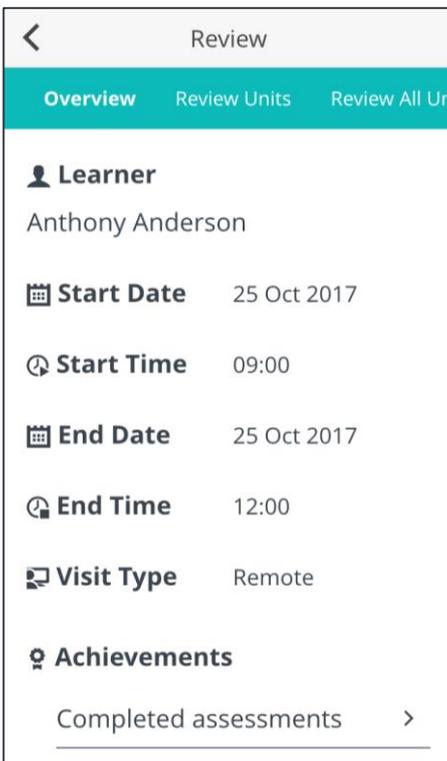
To schedule, start or complete a review, click on the **Reviews** icon, which can be found on your homepage or on a learner's overview page.

With this page open, you'll see three tabs at the top of the page: **Pending**, **Scheduled** and **Sync Ready**. Any reviews pending your action (created on the app or synced from the live system) will be found under the **Pending** tab. Any scheduled reviews that haven't been started will appear under the **Scheduled** section, and any reviews that you mark to finish online or have signed will be under the **Sync Ready** tab.

To open a scheduled or pending review that's synced down onto your app, you can just tap on its name. If you are doing this, please do not delete the review from the live system, unless advised to do so by Technical Support.

To create a review on the app, press the **context menu icon** in the bottom-right corner of your screen. On the **New Review** page, you can enter the review details and either select **Schedule**, to complete the review later, or **Start**, to complete the review now.

## REVIEW YOUR LEARNER'S PROGRESS, COMPLETE AND SYNC



In the Overview section, you can see the review details and the learner's completed assessments and signed off units since the last review.

**If your centre uses any custom data forms in their reviews, these will appear under the Forms section.**

When you want to move onto another section, just swipe left or right on your screen or tap the section heading at the top of the page. As you do this, the app auto-saves your work, so you can come back to this later on by clicking the back arrow to leave the review and finish it when you're ready.

When you're finished, move on to the **Sign** section to mark your review as sync ready. Click on the **context menu icon** in the bottom-right corner of your screen:

- **Finish Online** allows you to sync the review to the live system as it is, so you can make any necessary changes before signing it off.
- **Sign** allows you to sign the review.
  - Once you have signed, you can **choose to collect the learner's signature** by clicking on the context menu icon again. The learner can read through the review and sign it too.

When you've marked your review as sync ready, exit it by clicking the back arrow in the top-left corner of your screen. Your review will now be marked as **Sync Ready**.

Under the **Sync Ready** section, click on the **Sync all** button in the bottom-right corner of your screen to sync all of your completed reviews up to the live system. Once this is done, those reviews will no longer appear on your device.

To sync reviews individually, hold your finger down on one review to select it and press the **Sync** button in the bottom-right corner of your screen.

# NEED SOME HELP?

Don't forget that you can send a support enquiry from your device if you require some guidance or technical help.

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You can also contact our Technical Support team if you have any questions using the details below:

 0161 638 3876

 [support@onefile.co.uk](mailto:support@onefile.co.uk)

 **Onefile**