OneFile

Bulk import eportfolios

Overview

Creating learners individually can be time-consuming especially when you are configuring each learner manually. It's possible to bulk import learners into OneFile from a CSV file. This can save you hours of data entry if you have all the relevant information at hand.

Preparation

It's important that the spreadsheet containing the details of the learners has been set up and saved correctly. If you're starting from scratch, you can click here to download an example CSV file.

User Restrictions

Centre Managers & User Managers can use the bulk import facility. Assessors with the **Manage Learners** permission will also be able to bulk import eportfolio accounts.

Details

CSV file

The following table shows what information can be imported on a CSV file.

Column Heading	Example Data	Cell Format
First Name	Gemma	
Last Name	Hall	
Email	ghall@email.com	General
MIS Value	OF085	
Ethnicity Code	31	
Date of Birth	06/05/1992	Date
Date Registered	20/09/2014	

### Changing the Cell Format of a column in Excel

It's important that format of the calls are set correctly or you may experience issues further down the line.

1. Select the Column containing the fields you are going to change.
2. Right click on any of the selected cells.
3. Click on the **Format Cells** option.

4. Select the Category.

Note – Dates must be entered in the DD/MM/YYYY format

5. Click the **OK** button.
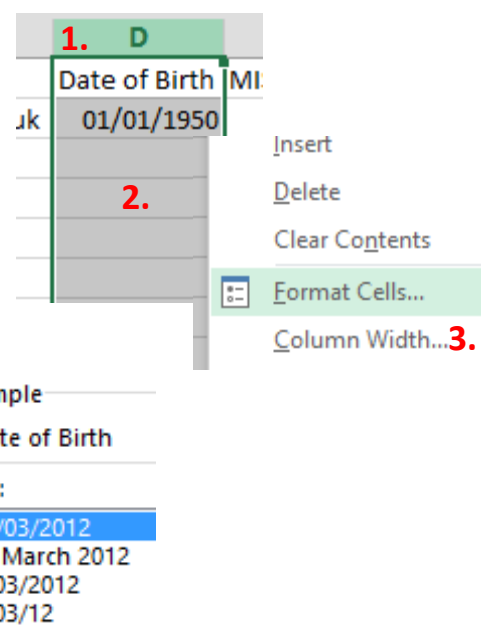
Saving the document as a CSV file

If your spreadsheet isn't already a CSV file, then you will need to change how it is saved so that it can be imported into OneFile.

1. Click on the **File** tab.
2. Select the **Save As** option.

3. Choose the location that the file should be saved.

4. Locate the **Save as type** drop down list.

5. Find and select the **CSV (Comma delimited)** option.

6. Click the **Save** button.

Import the CSV file

Now that the CSV has been saved to your computer, it's ready to be imported into OneFile. To do this, follow the steps below.

1. Click on the **Users** icon.
2. Click on the **Learners** tab.
3. Click on the **Bulk import eportfolio accounts** button.
4. Click the **Choose File** or **Browse** button and select the CSV file from your documents.

Note – Tick the checkbox if your CSV file had column headings.

5. Click the **Continue** button.

Match the column headings to the OneFile fields

You are now able to specify which column headings in your spreadsheet match the relevant fields in OneFile. To do this, select the relevant option in the down list.

If you are unable to see the right option, please check that the field can be imported and if the correct cell format has been selected on the CSV file.

In this example, the first name has already been matched and the last name is about to be selected for the 2nd column.

Click **Continue** once all available columns have been matched.

Set additional details

You can now add the following information to the learners you are about to import:

- Default Assessor
- Class
- Placement
- 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 individual by selecting a different option from the drop down lists on the row of the learner.

Once all of the additional details have been selected, you're ready to bulk import the learners. To do this, scroll to the bottom of the page and click the **Bulk Import Selected Learners** button.

This may take a few minutes depending on the number of learners and whether you had assigned a framework template.

Once the bulk import has finished, you will be provided with a list of login details that can be printed out.

If you want to send the login details to the learners individually, you will need to click the **Email** button on each learner's **Account** page.