

Overview

You can create an eportfolio for all new learners that haven't already been added to the system. If a learner has already been added to the system, you should create an [additional episode](#).

User Restrictions

Only Centre Managers and User Managers can create an eportfolio for a learner. Assessors with the **Manage Learners** permission will also be able to create their own learners.

Details

To create an eportfolio account, follow these steps.

1. Click on the **Users** icon.
2. Click on the **Learners** tab.
3. Click on the **Create new eportfolio** button.



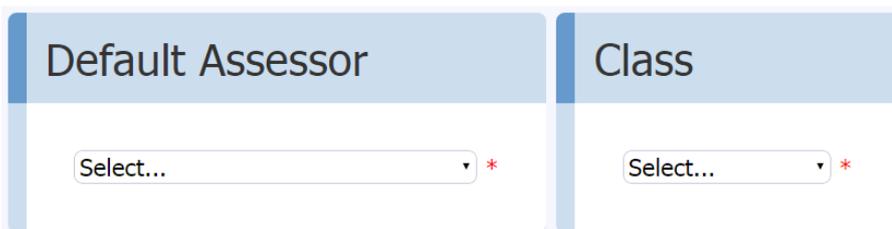
Assessors should click the **Manage Learners** icon on their homepage to create eportfolios.

A pop-up window will be displayed and you will be able to enter the details of the learner. Only the first and last names are mandatory but it is recommended that you also enter the learners email address.



The screenshot shows a form titled "Create new eportfolio" with a sub-header "New Eportfolio Account". It contains several input fields: "First name:", "Last name:", "Primary email:", "Date of birth: (leave blank if not known)", "National Insurance (NINO): (leave blank if not known)", and "ULN: (leave blank if not known)".

Once the details have been entered, you must select an **Assessor** and a **Class**.

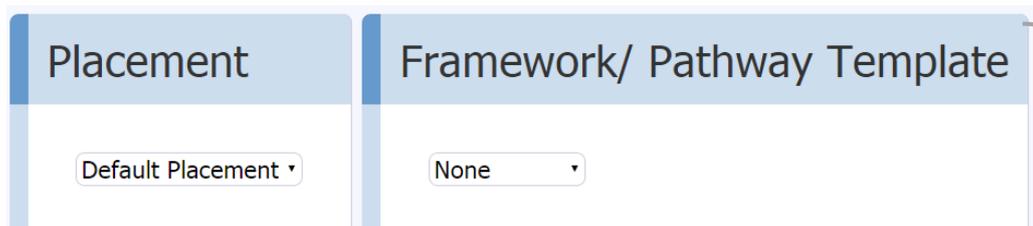


The screenshot shows two dropdown menus. The first is labeled "Default Assessor" and the second is labeled "Class". Both dropdowns currently show "Select..." and have a red asterisk next to them.



Click here to view the guide on creating Classes.

You can also select the learner's **Placement** and **Framework Template** from this page.



The screenshot shows two dropdown menus. The first is labeled "Placement" and the second is labeled "Framework/ Pathway Template". The first dropdown shows "Default Placement" and the second shows "None".

If your **Class** is linked to a **Framework Template**, this field will be automatically selected.

You won't be able to see this field if no [framework templates](#) have been created.

Once all of the fields have been completed, click the **Save** button at the bottom of the page.

Login details

When the details have been saved, the account will be created and you will be presented with the user's login details.

Home

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

OneFile Login Details for TEST OBSERVER

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Login page: <https://www.onefile.co.uk/login.aspx?srv=sof2>
Username : TOBSERVER6
Password : test123

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IMPORTANT - PLEASE READ ...

- * You are required to change this password when you first login
- * NEVER give your login details to anyone else including your employer or assessor
- * Your username and password are CASE-SENSITIVE so remember to capitalise any letters as appropriate. If you receive the message 'INCORRECT LOGIN DETAILS' it is because you are typing in the wrong username or password, or because you are not using capital letters where appropriate.
- * After logging in for the first time, please register your EMAIL address in MY PROFILE to benefit from future task alerts and password reminders
- * If you have difficulty logging in then you must contact the person who originally issued you with these login details.

[Print Details](#) [Continue](#)

If you want to print out the log in details, click the **Print Details** button.

If you would rather send an email containing their details, click **Continue**.

If you click **Continue** you will need to follow these steps to email the log in details to the learner.

1. Click the **Account** tab at the top of the page.
2. Scroll to the **Login details** section.
3. Click the **Email** button.

Setting up the portfolio

Now that the eportfolio has been created, the rest of the details should be added. The simplest way of doing this is by moving through each of the tabs at the top of the page from "**Account**" to "**Portfolio**".



Remember that you need to click **Save** at the bottom of each page to confirm the changes that have been made. Doing this will take you to the next tab, unless further action is required on the current tab.

Getting started

When the learner logs in for the first time, they will receive a task asking to update their profile information. They should also verify their email address so that they can start to receive email notifications from OneFile.