



# SUPPORT GUIDE

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Integration support



## What is Maytas?

Maytas is a Learner Management Information System addressing the back office management of training providers and employers.

Maytas can now be integrated with OneFile so that assessor, employer and trainee (Learner) records can be uploaded to OneFile, and learning aims can be downloaded from OneFile. Please note the OneFile integration is a licensed feature which can be purchased by contacting your Maytas account manager. For information on how to import your license, please consult the Maytas release notes.

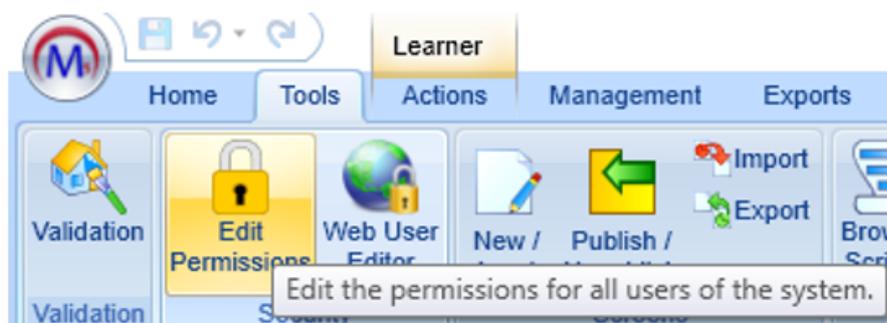
This guide is also available as a video, via this link: [https://youtu.be/C\\_sFskljOM](https://youtu.be/C_sFskljOM)

## How do I set up the OneFile Maytas Integration?

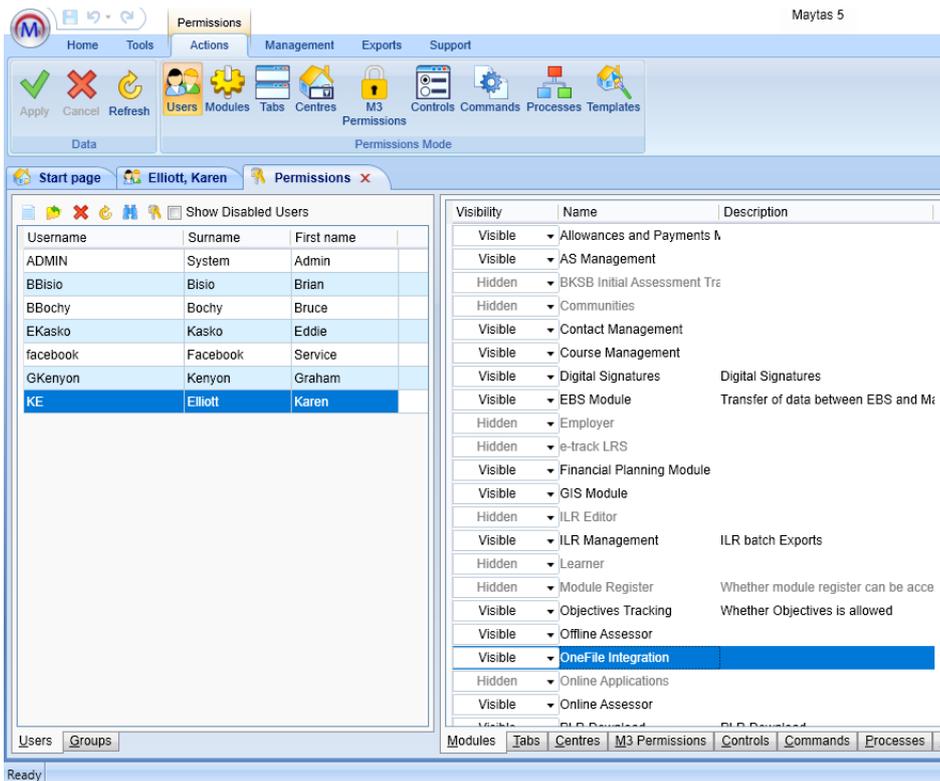
To set-up the integration, please email [support@onefile.co.uk](mailto:support@onefile.co.uk) and request the creation of a API token for your organisation. We'll provide you with your customer token, URL and default OneFile organisation ID.

## Maytas User Permissions

Once you have your customer token, URL and default OneFile organisation ID within Maytas, Under Tools and Edit Permissions, select the user in question and click on to the 'Modules' tab. Maytas have a new section headed 'OneFile Integration' and ensure the user required this is set to 'Visible'.



Under Tools and Edit Permissions, select the user in question and click on to the 'Modules' tab. Maytas have a new section headed 'OneFile Integration' and ensure for the user required this is set to 'Visible'.



Now, on the 'Commands' section, scroll down to the section headed 'Third-Party Integration' and you'll see a number of options:

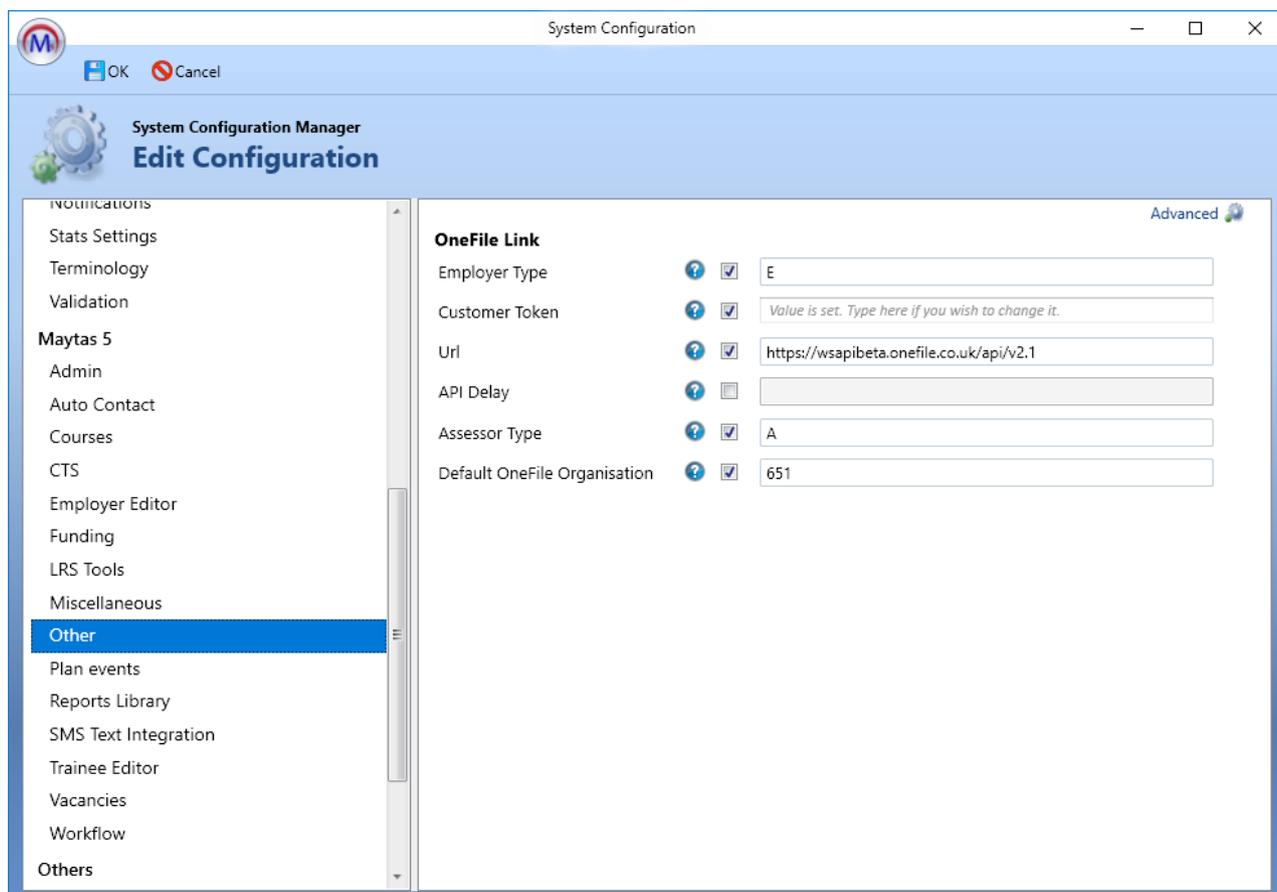
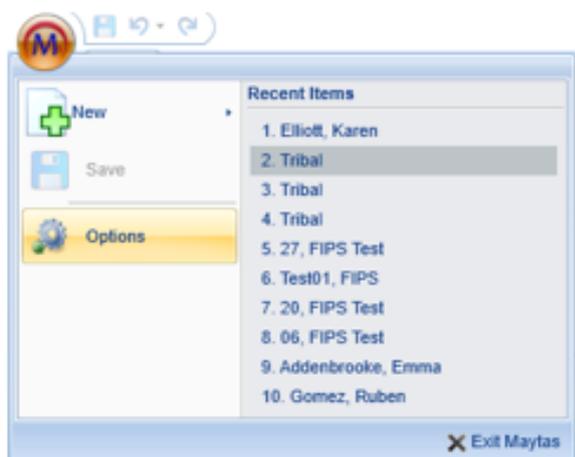
- 01 Get Aims from OneFile: This enables the user to download learning aims from OneFile for an individual learner
- 02 Get All OneFile aims: this enables the user to download all OneFile aims for all learner records that have been downloaded from OneFile
- 03 Map OneFile organisations: this enables the user to map meta centres to OneFile organisations
- 04 Upload Assessor to OneFile: this enables the user to upload assessor records to OneFile
- 05 Upload Employer to OneFile: this enables the user to upload employer records to OneFile
- 06 Upload Trainee to OneFile: this enables the user to upload trainee records to OneFile

Click 'Apply' once the permissions have been set and restart for the changes to take effect

## Configuring Maytas to sync with OneFile

Click the M5 button on the top left of the screen and select 'Options'.

Scroll down to the section headed 'Maytas 5' and the subsection headed 'Other'. Under 'Other', you can see there are a series of configuration options.



For each configuration option tick the box to enable it and enter the required details:

- 01 Employer Type: When uploading a trainee to OneFile mate s will display a list of the available employers to choose from this config option limits the list of employers to the entered Employer Type short-string, taken from the lookups for a TR Employer (Employer Type). Multiple values can be entered by comma separating.
- 02 Customer Token: this is used to interface with OneFile; please contact OneFile Support to obtain your token
- 03 URL: This is the URL for the OneFile API; please contact OneFile Support to obtain your token
- 04 API Delay: OneFile limits the number of aims which can be downloaded to 100 aims per minute. This setting sets the number of seconds between download attempts to prevent OneFile returning errors due to too many records being requested
- 05 Assessor Type: When uploading a trainee to OneFile, Maytas will display a list of the available assessors to choose from. This option limits the list of assessors to the entered Assessor Type short-string, taken from the lookups for TR Assessor (Assessor Type). Multiple values can be entered by comma separating.
- 06 Default OneFile Organisation: When a trainee Assessor or employer is uploaded, the record is assigned to a OneFile organisation. This can be done by mapping Maytas centres to OneFile organisations. If a Maytas centre is not mapped to a OneFile organisation, the default centre ID entered here in this conflict will be used when uploading records to OneFile.

Click 'Apply' once the permissions have been set and restart for the changes to take effect

It is strongly recommended to enter a default ID here because if a Maytas centre is not mapped to a OneFile organisation and there is no default organisation, you will not be able to upload records.

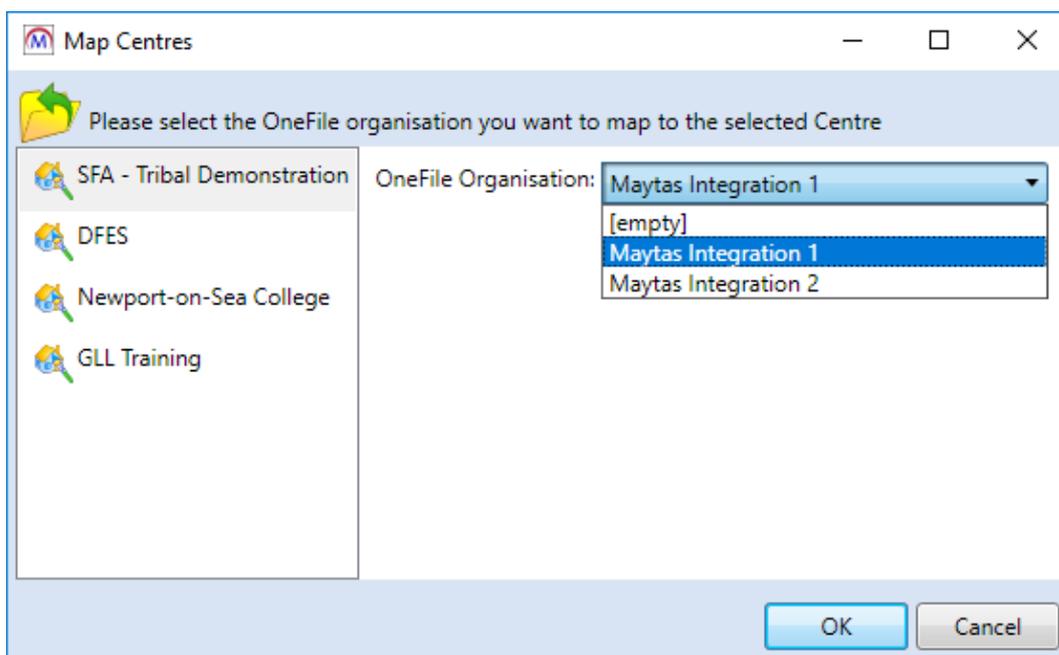
Once you have completed your configuration, click OK.

Finally, Maytas centres can be mapped to a OneFile organisation. This is not mandatory but, if the centre is not mapped to an organisation, then a default organisation must be specified in the configuration area, as above.

*Note that when you upload a Trainee, Assessor or Employer, the centre mapping is taken from the user centre that is selected at the top-left of the home screen - it is not taken from the centre of the Trainee, Assessor or Employer.*



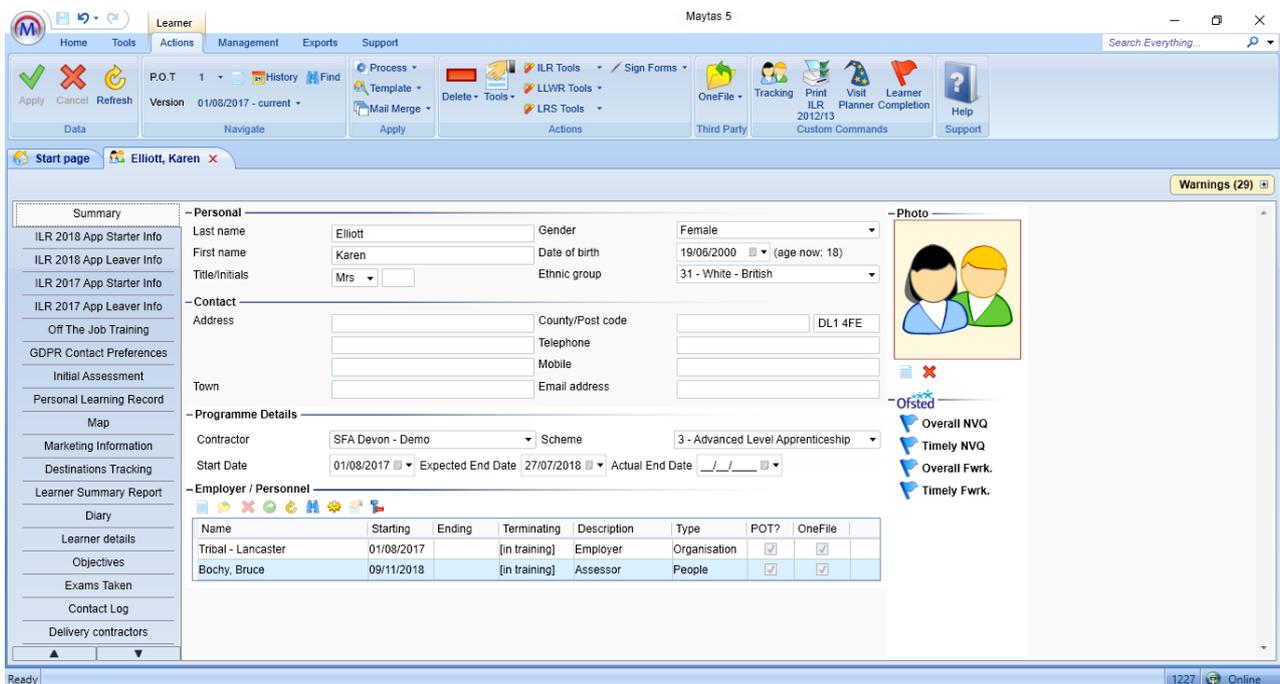
To map centres to organisations, go to 'Management', select 'OneFile' on the toolbar and 'Map Centres'.



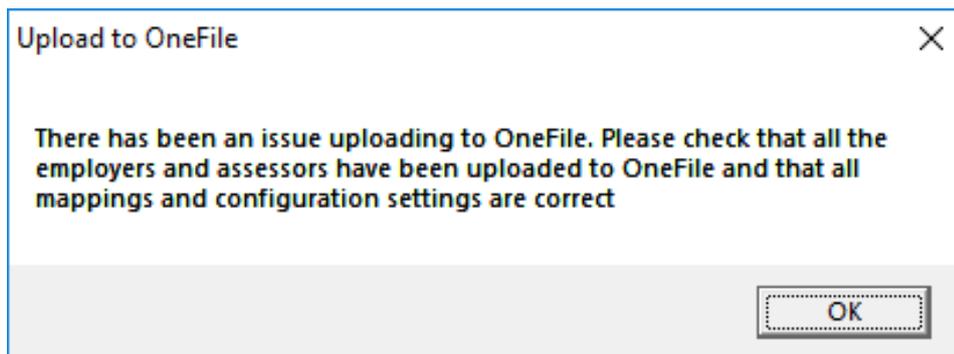
Here, you can choose the centre's in Maytas on the left and assign a OneFile organisation to them on the right. Click OK once finished.

## Uploading to oneFile

Before uploading learners to OneFile, it's important that the associated Assessors and Employers have already been previously uploaded.



Note: if you try to send the learner up to OneFile, Maytas will show you the below warning to check that the Employers and Assessors have been already uploaded to OneFile first.



## Uploading Assessors

Assessors have a 'OneFile' tab which shows the data which can be uploaded to OneFile. This data is taken from other Assessor tabs and is read-only on this page.



OneFile			
OneFile user ID	146180	OneFile organisation	Maytas Integration 1
First name	Bruce	E-mail	bruce@tribal.com
Last name	Bochy	Telephone	01888333444
Assessor ID	1227-0001-100190	Mobile	0777333444

*Note that if you upload an assessor record to OneFile and then change the Assessor data in Maytas, the OneFile tab will show the new data, not the original data that was uploaded.*

When you upload an Assessor, the record will be assigned to a OneFile organisation as follows:

- If the user selected Centre shown at the top-left of the home screen has an organisation mapped to it, that is used
- If there is no organisation map to the user selected centre the default organisation specified in the config is used
- If there is no centre mapping and no default organisation specified, a message will appear to inform you of this and you will not be able to upload the Assessor.

To upload an Assessor record to OneFile, on the ribbon, select 'OneFile' and 'Send to OneFile'.



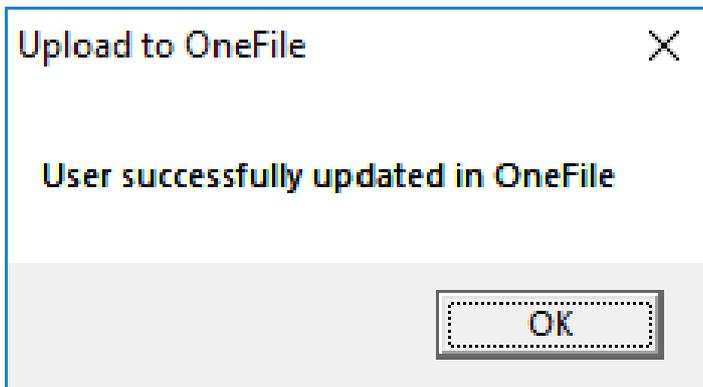
The data to be uploaded will be displayed if the Assessor has already been uploaded to the same OneFile organisation.

A message will appear at the top informing you of this.

You will still be able to upload the Assessor and the existing record will be updated with any changes from the Maytas side.

If the Assessor has already been uploaded under a different OneFile organisation, you can upload again and a new separate record will be created under the new organisation. Click 'Transfer' or 'Update' to proceed.

When the upload is finished a message will appear to say it was successful.



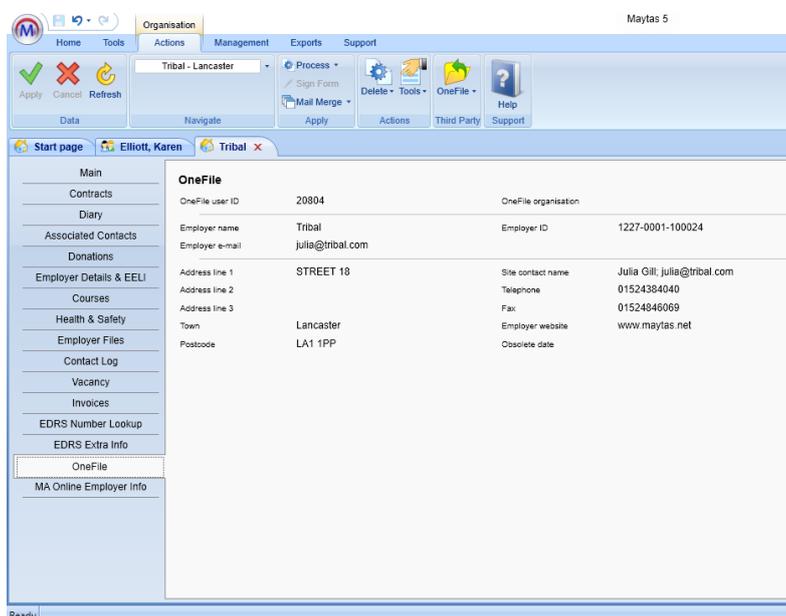
On clicking Refresh, you will be able to now see the OneFile user ID on the OneFile tab and which organisation.



Now in OneFile, the Assessor's First Name, Last Name, Email Address and Assessor ID from Maytas appear on the Assessor's 'Account' tab, and their Telephone and Mobile numbers will appear on their 'Profile' tab.

## Uploading Employers

Employers have a OneFile tab which shows the data which can be uploaded to OneFile. The data is taken from other employer tabs and is read-only on this page.



The screenshot shows the OneFile web interface. The top navigation bar includes 'Home', 'Tools', 'Actions', 'Management', 'Exports', and 'Support'. The main content area displays the 'OneFile' tab for an employer record. The record details are as follows:

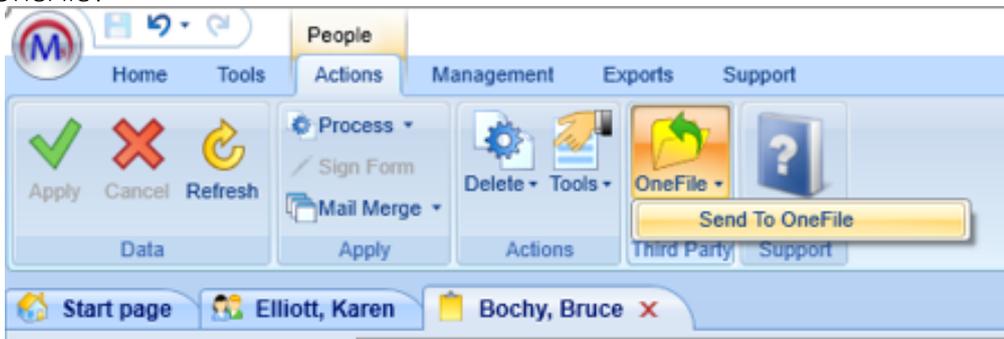
OneFile			
OneFile user ID	20804	OneFile organisation	
Employer name	Tribal	Employer ID	1227-0001-100024
Employer e-mail	julia@tribal.com		
Address line 1	STREET 18	Site contact name	Julia Gitt; julia@tribal.com
Address line 2		Telephone	01524384040
Address line 3		Fax	01524846069
Town	Lancaster	Employer website	www.maytas.net
Postcode	LA1 1PP	Obscure date	

Please note if you upload an Employer record to OneFile and then change the Employer data in Maytas, the OneFile tab will show the new data, not the original data that was uploaded.

When you upload an employer, the record will be assigned to a OneFile organisation:

- If the user selected a centre in the top-left and has an organisation mapped to it, that is used
- If there is no organisation mapped to the user centre, the default organisation specified in the Configuration Options is used
- If there is no centre mapping and no default organisation specified, a message will appear to inform you of this and you will not be able to upload the employer.

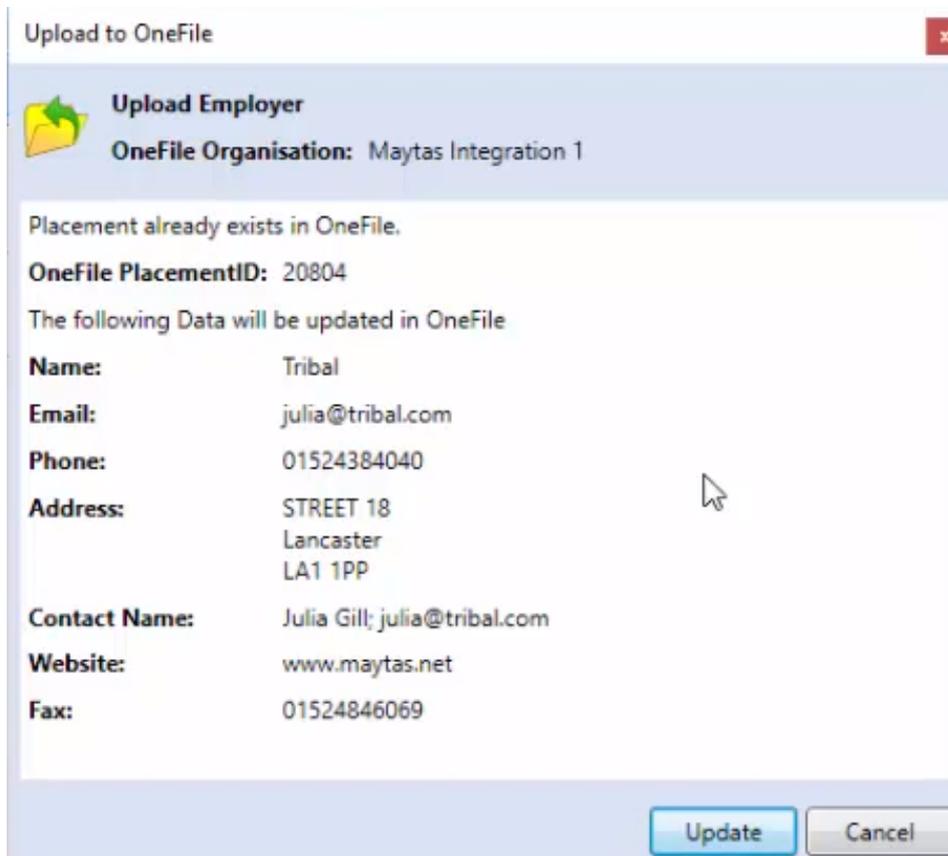
To upload an Assessor record to OneFile, on the ribbon, select 'OneFile' and 'Send to OneFile'.



If the employer has already been uploaded to the same OneFile organisation, a message will appear at the top, informing you of this.

You will still be able to upload the employer and the existing record will be updated with any changes from the Maytas side.

If the employer has already been uploaded under a different OneFile organisation, you can upload again and a new separate record will be created under the new organisation. Click 'Transfer' or 'Update' to proceed.



When the upload is finished a message will appear to say it was successful.

Now in OneFile, the Employer and their details (Employer Name, Address, Main Contact, Email Address and Telephone Number) will come through as a Placement.

## Uploading Trainee's/Learners

Trainees also have a OneFile tab which shows the data which can be uploaded to OneFile. Before uploading a learner, the learner must have an Assessor and employer assigned to them and both the Assessor and employer must already have been uploaded to OneFile.

The top of the tab (highlighted in yellow below) shows the data that is returned from OneFile once the trainee has been uploaded. These will be empty before the trainee has been uploaded. Under this section is read-only data taken from the summary tab.

The Assessor and Employer grid is also included, and at the bottom of the tab are grids for OneFile aims and units which will be blank at first and then populated when the trainee is uploaded, and their aims and units are downloaded from OneFile.

**OneFile**

OneFile user ID	146181	Classroom	Default Class
OneFile organisation	Maytas Integration 1		

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*The following fields are uploaded when you send the trainee to OneFile:*

First name(s)	Karen	E-mail	
Last name	Elliott	Telephone	
Date of birth	19/06/2000	Mobile	

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*The OneFile record will be linked to the chosen assessor and employer records in OneFile. The assessor and employer must exist in OneFile before you upload the Trainee.*

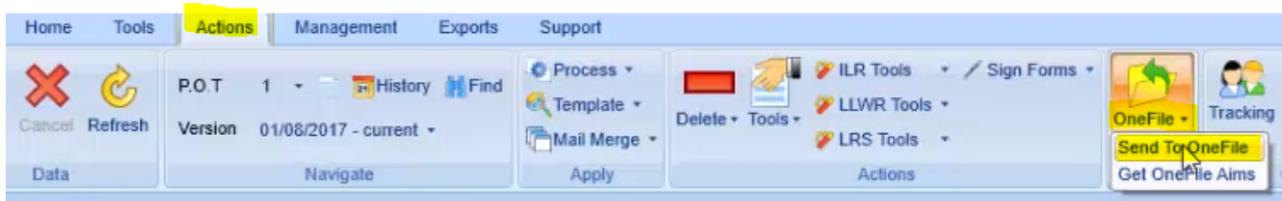
Name	Starting	Ending	Terminating	Description	Type	POT?	OneFile
Tribal - Lancaster	01/08/2017		[in training]	Employer	Organisation	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Bochy, Bruce	09/11/2018		[in training]	Assessor	People	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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Learning Aims

ID	Standard ID	Start Date	Planned End Date	Registration Number	Registration Date	Certificate Applied Date	Actual Ce
194804	3956						
194805	3693						
194806	3196						
194807	1827						

To upload a training record to OneFile, on the ribbon, select 'OneFile' and 'Send to OneFile'.



The data to be uploaded will be displayed. If the trainee has already been uploaded to the same OneFile organisation, a message will appear at the top informing you of this. You will still be able to upload the trainee and the existing record will be updated with any changes from the Maytas side.

If the trainee has already been uploaded under a different OneFile organisation, you can upload again and a new separate record will be created under the new organisation.

Select a Classroom from the 'Classroom' drop-down list.

*Note that the available options come from OneFile.*

Choose an employer to use as the placement - only one employer can be selected. The active column indicates whether the employer is still active, determined by whether the employer has an obsolete date entered against it.

Select Assessors to be assigned to the learner in OneFile - more than one Assessor can be chosen using the 'Select' option, but only one can be selected as the main Assessor in the 'Default Assessor' column. Click 'Transfer' or 'Update' to proceed with the upload

When the upload is finished a message will appear to say it was successful.

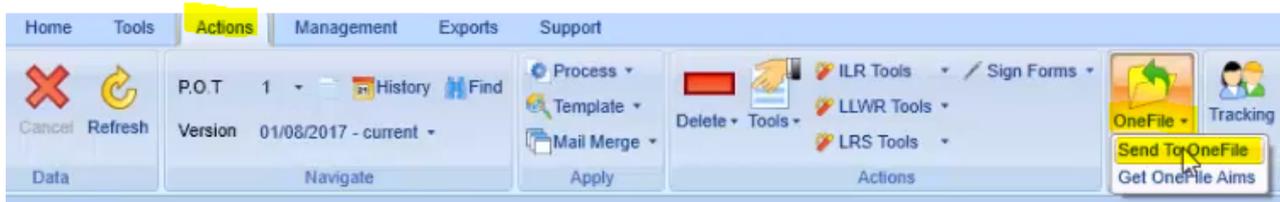
*Please note that you may need to click the 'Refresh' button in Maytas for the data to appear.*

The learner's details have been added to their account, ready for use in OneFile. As a result, you can now attach any learning aims and units as required in OneFile Eportfolio.

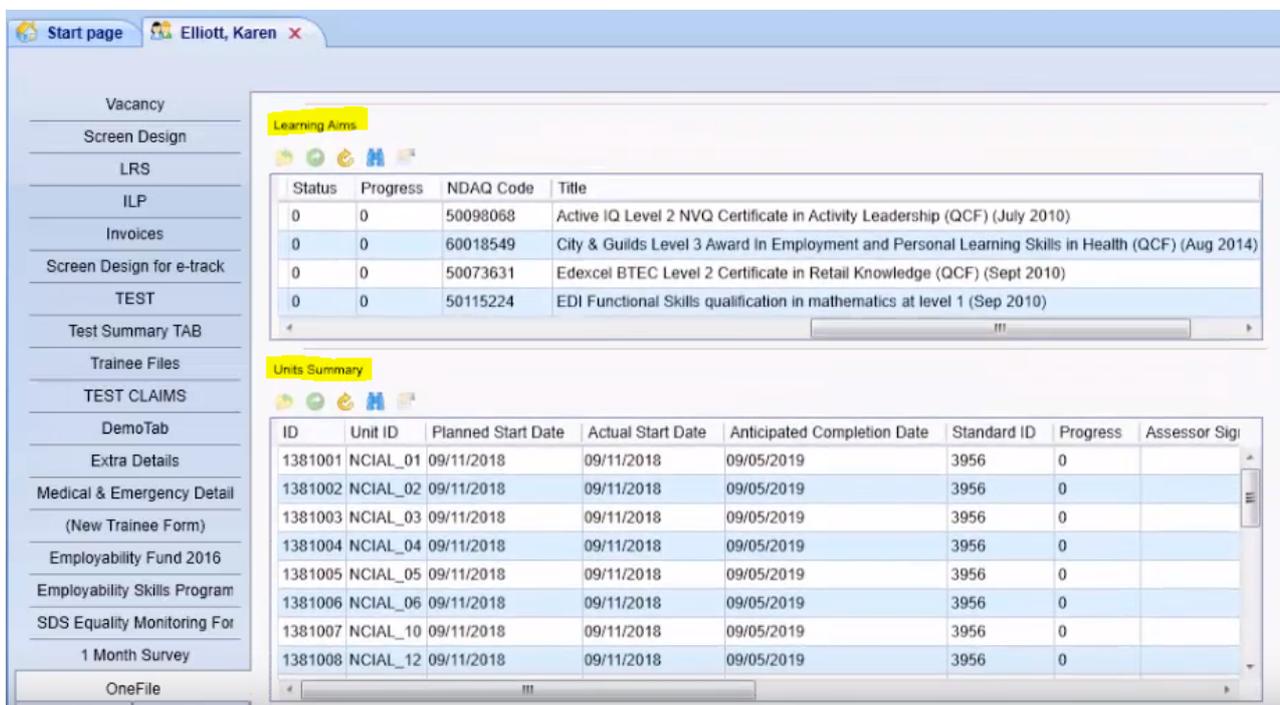
The learning aims and units from OneFile can then be downloaded back into Maytas, to make sure that the learner record in Maytas is up to date.

## Downloading Learning Aims

To download the learner's learning aims and units from OneFile, whilst on the learner's record, go to the ribbon, select 'OneFile' and 'Get OneFile Aims'.



When the download is complete a success message will appear, the 'Learning Aims' and 'Unit Summary' grids will then be populated on the OneFile tab with the downloaded data.



Status	Progress	NDAQ Code	Title
0	0	50098068	Active IQ Level 2 NVQ Certificate in Activity Leadership (QCF) (July 2010)
0	0	60018549	City & Guilds Level 3 Award in Employment and Personal Learning Skills in Health (QCF) (Aug 2014)
0	0	50073631	Edexcel BTEC Level 2 Certificate in Retail Knowledge (QCF) (Sept 2010)
0	0	50115224	EDI Functional Skills qualification in mathematics at level 1 (Sep 2010)

ID	Unit ID	Planned Start Date	Actual Start Date	Anticipated Completion Date	Standard ID	Progress	Assessor Sign
1381001	NCIAL_01	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381002	NCIAL_02	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381003	NCIAL_03	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381004	NCIAL_04	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381005	NCIAL_05	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381006	NCIAL_06	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381007	NCIAL_10	09/11/2018	09/11/2018	09/05/2019	3956	0	
1381008	NCIAL_12	09/11/2018	09/11/2018	09/05/2019	3956	0	

## Updating Learning Aims and Units in bulk

It's possible to download in bulk all aims and units for all trainees that have been uploaded to OneFile.

Go to the 'Management' tab on the toolbar at the top of the page and select 'OneFile' then 'Get Learning Aims'. The aims and units will then be downloaded. Click OK when completed.

The learning aims and unit summary grids will be populated with the downloaded data on the learner's OneFile tab in Maytas.