

# **SUPPORT GUIDE**

## 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\_sSFskIjOM

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

To set-up the integration, please email 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. Mayas 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'.

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Home Tools	Actions Ma	anagement Exports	Support			
Apply Cancel Refresh	Users Modules Tab	Centres M3 Permissions Permissions	Controls Comma	nds Processes Templat	es	
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📄 📂 🗙 🍐 👭 🤻	Show Disabled	Users	Visibility	Name	Description	
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GKenyon	Kenyon	Graham	Visi	ble 🛛 🗸 Digital Signa	atures Digital Signatures	
KE	Elliott	Karen	Visi	ble 👻 EBS Module	e Transfer of data between EBS ar	nd Ma
			Hide	len 🔹 Employer		
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Osers Groups			Modules	Tanz Centres W	s remissions   Controls   Commands   Proces	ses .

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.





**Vonefile** 

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.

Learner			Maytas 5		– a ×
Home Tools Actions Mana	gement Exports Support				Search Everything 🔎 🔻
Apply Cancel Refresh Data P.O.T 1 • Version 01/08/201	Find Find Template	• Delete • Tools • P LLWR Tools • LLWR Tools • P LLWR Tools • P LRS Tools Actions	• ∕ Sign Forms • • • • •	Tracking Print Visit Learner LR Planner Completion 2012/13 Custom Commands	Rep Support
😚 Start page 🕺 Elliott, Karen 🗙					
					Warnings (29) 🖲
Summary - Personal				- Photo	A
ILR 2018 App Starter Info	Elliott	Gender	Female	-	
ILR 2018 App Leaver Info	Karen	Date of birt	h 19/06/2000	(age now: 18)	
ILR 2017 App Starter Info	Mrs 👻	Ethnic grou	p 31 - White - Br	itish 🔹 🌔	
ILR 2017 App Leaver Info -Contact -				<b>\</b>	
Off The Job Training Address		County/Pos	t code	DL1 4FE	
GDPR Contact Preferences		Telephone			
		Mobile		N	<pre></pre>
Personal Learning Record		Email addre	955		5
Man – Programm	ne Details			Urstee v	
Marketing Information Contracto	r SFA Devon - D	mo 🔻 Scheme	3 - Advanced L	evel Apprenticeship 🔹 🍗 Ti	imely NVQ
Destinations Tracking Start Date	01/08/2017	Expected End Date 27/07/2018	Actual End Date _/_/		verall Fwrk.
Learner Summary Report - Employer	/ Personnel			ті 💎 ті	imely Fwrk.
Diary	K 😡 🕹 👭 🌳 🚰 🦒				
Learner details Name	Starting	Ending Terminating Des	scription Type F	POT? OneFile	
Objectives Tribal - Li	ancaster 01/08/20	17 [in training] Emp	oloyer Organisation		
Evams Taken	uce 09/11/20	8 [in training] Ass	essor People		
Contact Log					
Razdy					1227 📿 Opling

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.

8	👌 Start page 🛛 🕵 Elliott, Ka	aren 📋 Bochy, Br	uce X		
	Main Diary	OneFile OneFile user ID	146180	OneFile organisation	Maytas Integration 1
	Trainees / Employers Team Information Contact Log	First name Last name	Bruce Bochy	E-mail Telephone	bruce@tribal.com 01888333444
	IQA Modules CPD	Assessor ID	1227-0001-100190	Mobile	0///333444
	HR Tasks				
	OneFile				

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.

😚 Start page 🕺 Elliott, Ka	aren 📋 Bochy, Bri	uce X		
Main	OneFile			
Diary	OneFile user ID	146180	OneFile organisation	Maytas Integration 1
Trainees / Employers			-	
Team Information	First name	Bruce	E-mail	bruce@tribal.com
Contact Log	Last name	1227-0001-100100	Telephone	0777333444
IQA Modules	Assessor ID	1227-0001-100190	Mobile	0111555444
CPD				
HR				
Tasks				
OneFile				



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.

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Home Tools Ac	tions Management	Exports Support		
Apply Cancel Refresh Data	Tribal - Lancaster -	Process *     Sign Form     Mail Merge *     Apply     Actions	OneFile - Help Third Party	
Start page Start page	iren 🚯 Tribal 🗙			
Main	OneFile			
Contracts	OneFile user ID	20804	OneFile organisation	
Diary	Employer name	Tribal	Employer ID	1227-0001-100024
Associated Contacts	Employer e-mail	julia@tribal.com		
Donations	Address line 1	STREET 18	Site contact name	Julia Gill: julia@tribal.com
Employer Details & EELI	Address line 2		Telephone	01524384040
Courses	Address line 3		Fax	01524846069
Health & Safety	Town	Lancaster	Employer website	www.maytas.net
Employer Files	Postcode	LA1 1PP	Obsolete date	
Contact Log				
Vacancy				
Invoices				
EDRS Number Lookup				
EDRS Extra Info				
OneFile				
MA Online Employer Info				
Des de				

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.

Upload to OneFile		x
Upload Emp OneFile Org	anisation: Maytas Integration 1	
Placement already e	xists in OneFile.	
OneFile Placement	D: 20804	
The following Data v	vill be updated in OneFile	
Name:	Tribal	
Email:	julia@tribal.com	
Phone:	01524384040	N
Address:	STREET 18 Lancaster LA1 1PP	13
Contact Name:	Julia Gill; julia@tribal.com	
Website:	www.maytas.net	
Fax:	01524846069	
		Update Cancel

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 an 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 user ID       146181       Classroom       Default Class         OneFile organisation       Maytas Integration 1	neFile use											
DneFile organisation       Maytas Integration 1         The following fields are uploaded when you send the trainee to OneFile:         First name(s)       Karen         Elliott       Telephone         Date of birth       19/06/2000         Mobile       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 to trainee.         Image: Provide the chosen assessor and employer records in OneFile. The assessor and employer must exist in OneFile before you upload to trainee.		er ID	146181			Cla	ssroom	Defaul	t Class			
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 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 to Trainee.	IneFile org	anisation	Maytas Inte	gration 1								
First name(s)       Karen       E-mail         Last name       Elliott       Telephone         Date of birth       19/06/2000       Mobile         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 to trainee.         Image: Point Complex C	'he followin	ng fields are uplo	aded when you a	end the trait	nee to OneFil	e:						
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Date of birth 19/06/2000 Mobile 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 in Frainee.	ast name		Elliott			Tele	phone					
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 i Trainee.	ate of birth	h	19/06/2000			Mol	bile					
Tribal - Lancaster 01/08/2017 [in training] Employer Organisation 📝 📝	Name										1 01101 110	
Name Starting Ending Terminating Description Type POT? OneFile			0	tarting	Ending	Terminating	Descriptio	n Type		POT?	OneFile	
Tribal - Lancaster 01/08/2017 [in training] Employer Organisation	Name		04	0000047		Contractor in the set	E	0		1770	1772	
Bochy, Bruce 09/11/2018 [in training] Assessor People 💟 💟	Name Tribal - Li	ancaster	01	/08/2017		(in training)	Employer	Organis	ation	1	<b>V</b>	
	Name Tribal - Li Bochy, Bi earning Air	ancaster ruce ms	01	/08/2017 /11/2018		(in training) [in training]	Employer Assessor	Organis People	ation	1	<ul> <li>✓</li> <li>✓</li> </ul>	
🍅 🕝 🖒 🕌 🚰	Name Tribal - Li Bochy, Bi earning Air	ancaster ruce ms c # ?	01 09	/08/2017 /11/2018	End Date	[in training] [in training]	Employer Assessor	Organis: People	Cortifi		Vied Date	Actual
Standard ID Start Date Planned End Date Registration Number Registration Date Certificate Applied Date A 194804 3956	Name Tribal - Li Bochy, Bi earning Air D	ancaster ruce ms C M C Standard ID	01 09 Start Date	/08/2017 /11/2018 Planned	End Date	[in training] [in training]	Employer Assessor umber Re	Organis: People egistration Date	Certifi	cate App	V V Dlied Date	Actual
<ul> <li>Standard ID</li> <li>Start Date</li> <li>Planned End Date</li> <li>Registration Number</li> <li>Registration Date</li> <li>Certificate Applied Date</li> <li>A</li> <li>A</li></ul>	Name Tribal - Li Bochy, Bi earning Air D 0 194804	ancaster ruce ms Standard ID 3956 3693	01 09 Start Date	/08/2017 /11/2018 Planned	End Date	[in training] [in training]	Employer Assessor umber Re	Organis: People egistration Date	Certifi	cate App	V V	Actual
ID       Standard ID       Start Date       Planned End Date       Registration Number       Registration Date       Certificate Applied Date       A         194804       3956       Image: Contract of the contrac	Name Tribal - L Bochy, B earning Air D 194804 194805	ancaster ruce ms Company Standard ID 3956 3693 3196	01 09 Start Date	/08/2017 /11/2018 Planned	End Date	[in training] [in training]	Employer Assessor umber Re	Organis: People egistration Date	Certifi	Cate App	olied Date	Actual (

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

Home	Tools	Actions Management Exports	Support		
Cancel	Refresh	P.O.T 1 • History Find Version 01/08/2017 - current •	Process *     Template *     Mail Merge *	Delete * Tools * / Sign Forms * / LLWR Tools * / LRS Tools *	OneFile • Tracking
Data		Navigate	Apply	Actions	Get OnePile Aims

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'.

Home To	s Action	s Management	Exports	Support		
Cancel Refres	P.O.T Version	1 • History 01/08/2017 - current	Find	Process      Template      Mail Merge	Delete + Tools + P LLWR Tools + P LLWR Tools + P LRS Tools + Send TorOne	racking
Data		Navigate		Apply	Actions Get OnePile /	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.

Vacancy									
Screen Design	Learning Aim	15							
LRS	👏 😡 🤆	M =							
ILP	Status	Progress	NDAQ Code	Title					_
Invoices	0	0	50098068	Active IQ Level 2 NVQ	Certificate in Activity Leadership	(QCF) (July 20	010)		
Invoices	0	0	60018549	City & Guilds Level 3 A	ward in Employment and Person	hal Learning Ski	ills in Health	(QCF) (Aug	201
Screen Design for e-track	0	0	50073631	Edexcel BTEC Level 2	Certificate in Retail Knowledge	(QCF) (Sept 20	10)		
TEST	0	0	50115224	EDI Functional Skills q	ualification in mathematics at lev	el 1 (Sep 2010)	)		
Test Summary TAB	4					iii			_
Trainee Files	Units Summ	ary							
Trainee Files TEST CLAIMS	Units Summ	ary M P							
Trainee Files TEST CLAIMS DemoTab	Units Summ	ary M P	Planned Start Dat	te Actual Start Date	Anticipated Completion Date	Standard ID	Progress	Assessor	Sigi
Trainee Files TEST CLAIMS DemoTab Extra Details	Units Summ	ary Million Unit ID NCIAL_01	Planned Start Dal 09/11/2018	te Actual Start Date 09/11/2018	Anticipated Completion Date 09/05/2019	Standard ID 3956	Progress 0	Assessor	Sigi
Trainee Files TEST CLAIMS DemoTab Extra Details Wedical & Emergency Detail	Units Summ Control Control Co	Unit ID NCIAL_01 NCIAL_02	Planned Start Dal 09/11/2018 09/11/2018	te Actual Start Date 09/11/2018 09/11/2018	Anticipated Completion Date 09/05/2019 09/05/2019	Standard ID 3956 3956	Progress 0 0	Assessor	Sigi
Trainee Files TEST CLAIMS DemoTab Extra Details Medical & Emergency Detail (New Trainee Form)	Units Summ D 1381001 1381002 1381003	Unit ID NCIAL_01 NCIAL_02 NCIAL_03	Planned Start Dal 09/11/2018 09/11/2018 09/11/2018	te Actual Start Date 09/11/2018 09/11/2018 09/11/2018	Anticipated Completion Date 09/05/2019 09/05/2019 09/05/2019	Standard ID 3956 3956 3956	Progress 0 0 0	Assessor	Sigi
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Trainee Files TEST CLAIMS DemoTab Extra Details Addical & Emergency Detail (New Trainee Form) Employability Fund 2016 Employability Skills Program	Units Summ D ID 1381001 1381002 1381003 1381004 1381005 1381006	Unit ID NCIAL_01 NCIAL_02 NCIAL_03 NCIAL_04 NCIAL_05 NCIAL_06	Planned Start Dal 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018	te Actual Start Date 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018	Anticipated Completion Date 09/05/2019 09/05/2019 09/05/2019 09/05/2019 09/05/2019 09/05/2019	Standard ID 3956 3956 3956 3956 3956 3956	Progress 0 0 0 0 0 0 0 0 0 0	Assessor	Sigi
Trainee Files TEST CLAIMS DemoTab Extra Details Addical & Emergency Detail (New Trainee Form) Employability Fund 2016 Employability Skills Program SDS Equality Monitoring For	Unts Summ D 1381001 1381002 1381003 1381003 1381004 1381005 1381006 1381007	Unit ID NCIAL_01 NCIAL_02 NCIAL_03 NCIAL_03 NCIAL_05 NCIAL_06 NCIAL_10	Planned Start Dal 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018	te Actual Start Date 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018 09/11/2018	Anticipated Completion Date 09/05/2019 09/05/2019 09/05/2019 09/05/2019 09/05/2019 09/05/2019 09/05/2019	Standard ID 3956 3956 3956 3956 3956 3956 3956 3956	Progress 0 0 0 0 0 0 0 0 0 0 0 0 0	Assessor	Sigi

## 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.