

OneFile and ProSolution

Overview

Integrate your OneFile centre with your Advanced ProSolution MIS for efficient and cost effective data management. With this integration, you can create learners in OneFile automatically or at the click of a button from ProSolution MIS. This integration is one-way, and ProSolution is the master system.

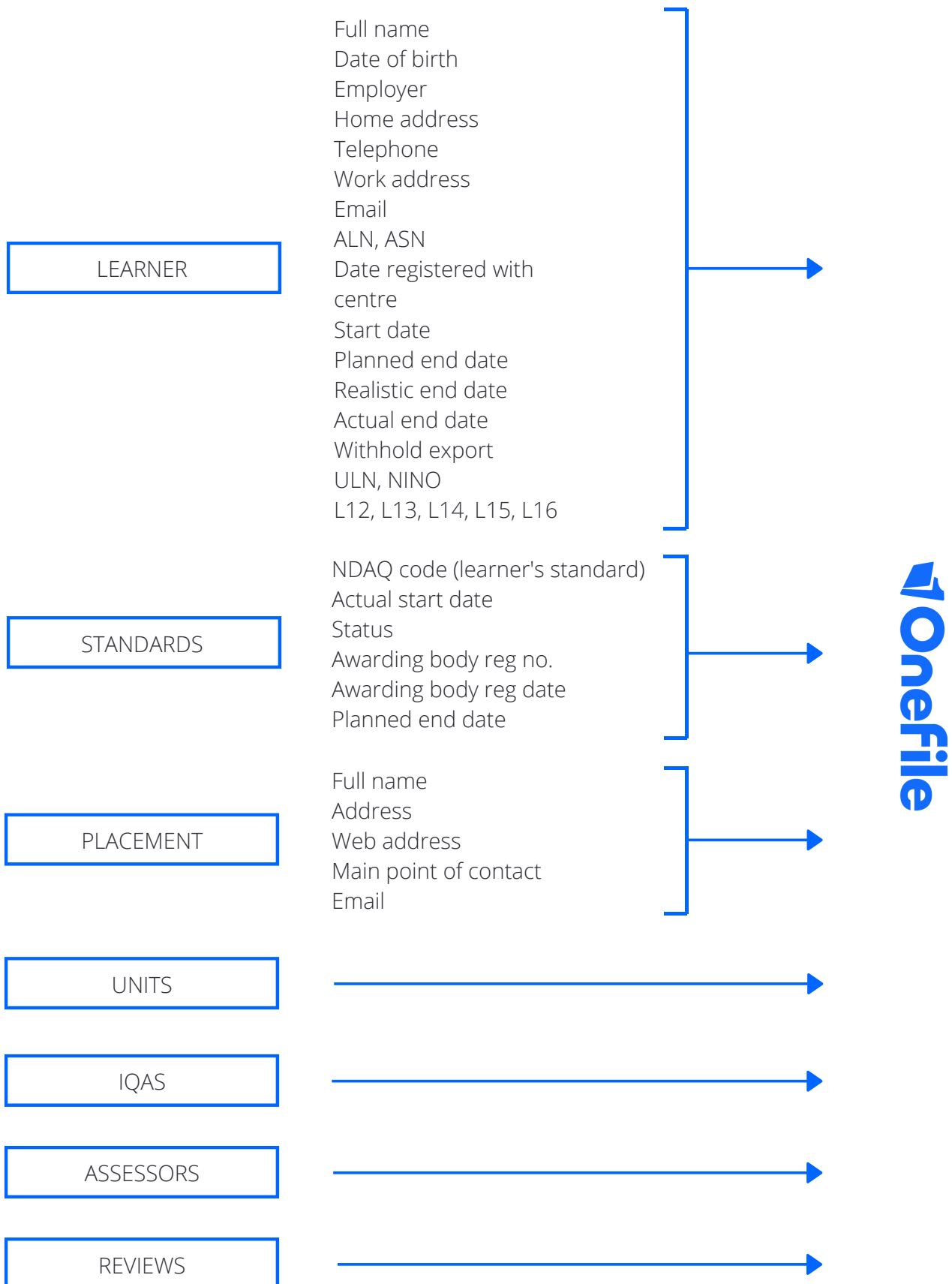
Creating the integration

- Contact your customer success manager or our support teams to discuss integration.
- On request, we will create a portal ID, username and password for your OneFile centre and send them to you. You'll need to be a centre manager so we can add them to your restricted resource area.
- You'll create the integration within Prosolution using the details provided by OneFile.
- You will then be able to set up your centre and configure the integration to your requirements.

Integration fields

Scroll down to see which fields can be synced from ProSolution.

Integration fields



Preparation

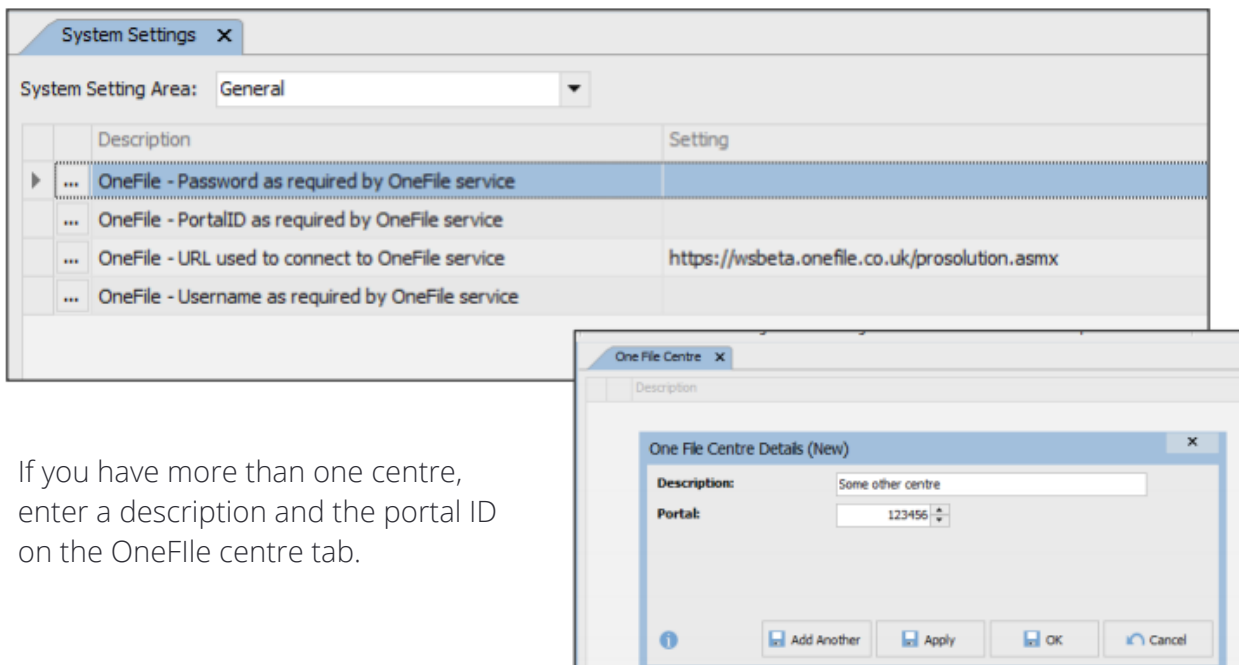
Please contact support@onefile.co.uk to request the portal for your centre.

Configuring the integration

When your portal has been set up, follow these steps to configure your Prosolution integration:

1. Log in to Prosolution and navigate to system settings.
2. Select the general tab.
3. Enter the portal ID, username and password provided by OneFile.
4. Enter the URL of the environment you want to integrate with from the 2 options below.

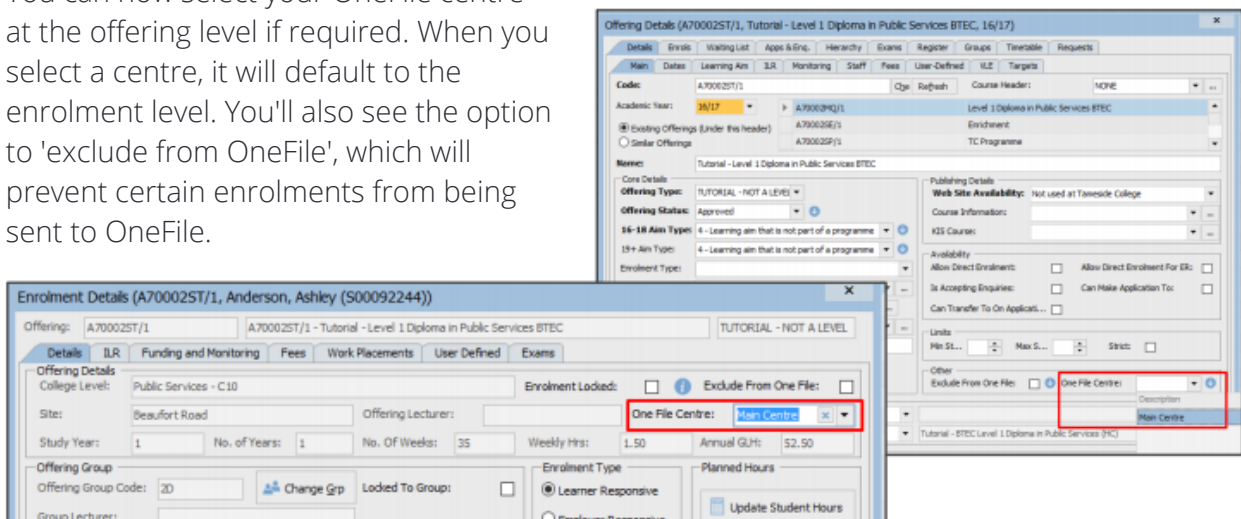
Environment	URL
Live	https://ws.onefile.co.uk/ProSolution.asmx
Beta	https://wsbeta.onefile.co.uk/ProSolution.asmx



If you have more than one centre, enter a description and the portal ID on the OneFile centre tab.

Offering and enrolment details

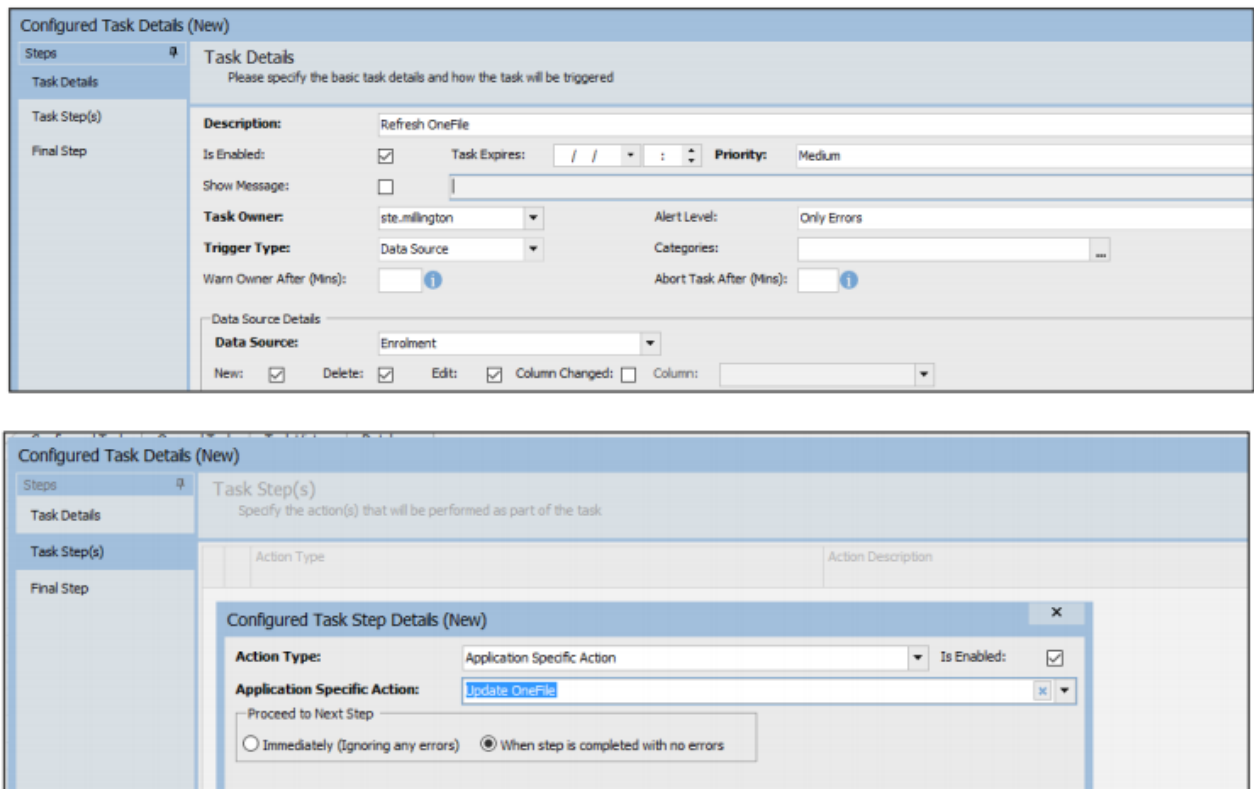
You can now select your OneFile centre at the offering level if required. When you select a centre, it will default to the enrolment level. You'll also see the option to 'exclude from OneFile', which will prevent certain enrolments from being sent to OneFile.



The image shows two overlapping screenshots of the OneFile system. The top screenshot is the 'Offering Details' window for 'A70002ST/1, Tutorial - Level 1 Diploma in Public Services BTEC, 16/17'. It shows various tabs like 'Details', 'Enrols', 'Waiting List', etc. The 'Details' tab is active, showing 'Academic Year: 16/17', 'Code: A70002ST/1', and 'Offering Type: TUTORIAL - NOT A LEVEL'. The bottom screenshot is the 'Enrolment Details' window for 'A70002ST/1, Anderson, Ashley (S00092244)'. It shows 'Offering: A70002ST/1' and 'Offering Details' tab. The 'Enrolment Locked' checkbox is checked, and the 'Exclude From One File' checkbox is unchecked. The 'One File Centre' dropdown is set to 'Main Centre'.

Creating a task

You now need to create a task to specify when learners will be created in OneFile.



The image shows two screenshots of the OneFile system. The top screenshot is the 'Configured Task Details (New)' window. It shows 'Task Details' with 'Description: Refresh OneFile', 'Is Enabled: [checked]', 'Task Expires: / /', 'Priority: Medium', 'Task Owner: ste.millington', 'Alert Level: Only Errors', 'Trigger Type: Data Source', 'Categories: [empty]', 'Warn Owner After (Mins): [empty]', 'Abort Task After (Mins): [empty]', 'Data Source Details: Data Source: Enrolment', 'New: [checked]', 'Delete: [checked]', 'Edit: [checked]', 'Column Changed: [unchecked]', 'Column: [empty]'. The bottom screenshot is the 'Configured Task Step(s)' window. It shows 'Task Step(s)' with 'Action Type: Application Specific Action', 'Is Enabled: [checked]', 'Application Specific Action: Update OneFile', 'Proceed to Next Step: [radio buttons]', 'Immediately (Ignoring any errors): [unchecked]', 'When step is completed with no errors: [checked]'. A 'Configured Task Step Details (New)' window is also open, showing 'Action Type: Application Specific Action', 'Is Enabled: [checked]', 'Application Specific Action: Update OneFile', 'Proceed to Next Step: [radio buttons]', 'Immediately (Ignoring any errors): [unchecked]', 'When step is completed with no errors: [checked]'.



info.onefile.co.uk/onboarding