Onefile

Centre Manager Basics

Archiving Users

Archiving Users

Archiving can be performed for learner, tutor and IQA accounts and when archiving a tutor or IQA, their tasks and caseload can be re-allocated to another user.

When a user is no longer active within OneFile, their account must be archived to remove them from the default results of any reports and tracking.

Important: You must archive Learners to ensure the seat becomes active for another for the remainder of your contract

Archiving Learners

1.Select the **Users** icon from the left-hand menu

2. Select the **Learners** tab to see all learners on your centre or use the **Search** function to find users using keyword search

3. Select the **details/episodes** button for the required learner

4. Select the **Learning Aims** button

5. Tick the **Archive this detail/episode** checkbox

6. To proceed with archiving the learner, select **Save**

7. To unarchive a learner, simply untick the **Archive this detail/episode** checkbox and select **Save**
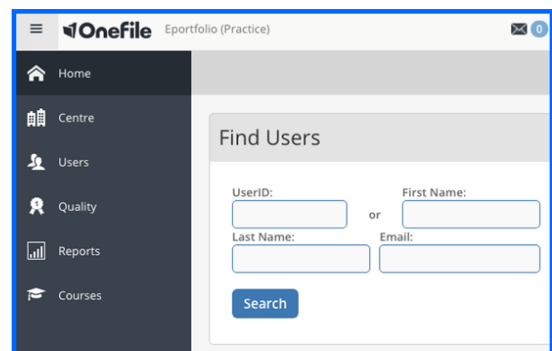
Last Name	First Name	ULN	NINO	Credits Used	Options
Blue	Pete			35	Episodes
Blue2	Pete			0	Episodes
Jacobs	Michael			35	Episodes
Learner	Josh			0	Episodes

Archive
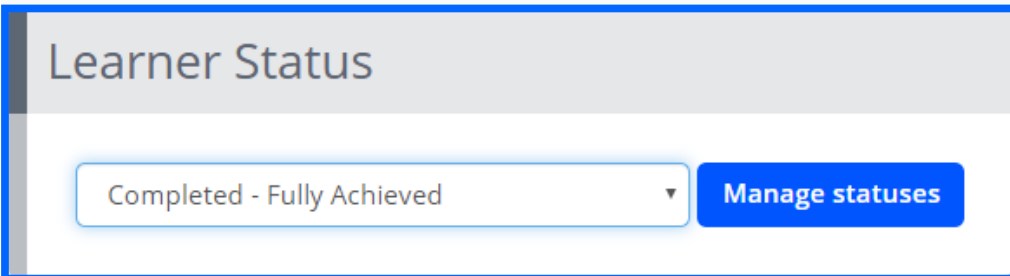
Archive this episode   Date archived:

Learner Status

It's good housekeeping to apply a Learner status so you can report on the status of each learner, for example 'completed - fully achieved, withdrawn, awaiting EPA'. To change the status please follow the below steps:

1. Log into your Centre Manager account
2. Select the **Users** tab from the left side bar
3. Choose the **learners tab** from the top of the page
4. Search for the learner that you want to amend and click the **details/episode button**
5. Select the **detail/episode button** again from these options
6. You should now see the below box, select a status from the drop down box or create a new status using the **manage statuses** button

Archiving other users

1.Select the **Users** icon from the left-hand menu

2.Select a **User Group Tab** to see all the users within that user group on your centre or use the **Search** function to find users using keyword search

3. Select the **Account button for the required user**

4. Select the **Archive** button

5. Use the drop-down menu to select a user to **Allocate caseload and tasks** to another user

6. Select **Archive** button to finish

7. To unarchive the user select the **Unarchive** button
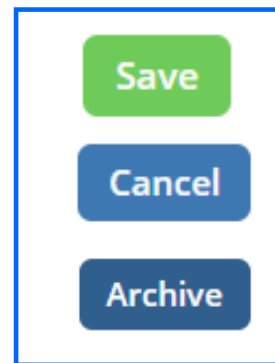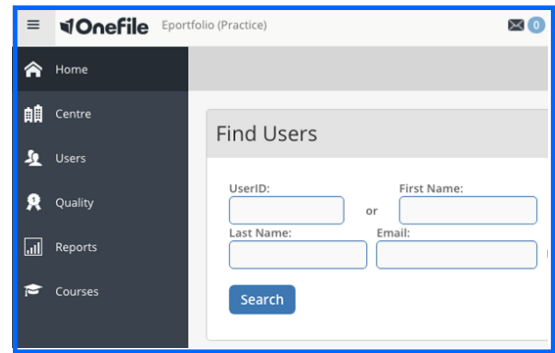
Last Name	First Name	Options
Assessor	John	Account Profile
Stockton	Sherry	Account Profile
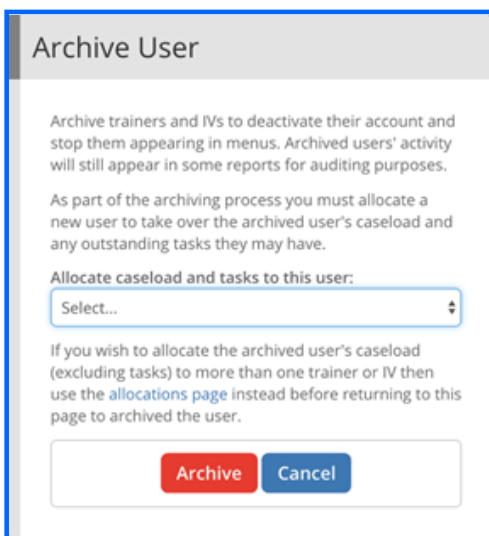
To learn more see our full guides
https://live.onefile.co.uk/userguides/

Onefile

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