Onefile

Centre Manager Basics

How to bulk import learners

Bulk Importing Learners

It's possible to bulk import learners into OneFile from a CSV file. This can save you hours of data entry if you have all the relevant information at hand.

Preparation

It's important that the spreadsheet containing the details of the learners has been set up and saved in CSV format.

User restrictions

Centre Managers & User Managers can use the bulk import facility. Assessors with the "Manage Learners" permission will also be able to bulk import eportfolio accounts.

Prepare the CSV File

The following table shows what information can be imported on a CSV file.

Column Heading	Example Data	Cell Format
First Name	Gemma	General
Last Name	Hall	
Email	ghall@email.com	
MIS Value	OF085	
Ethnicity Code	31	
Date of Birth	06/05/1992	Date
Date Registered	20/09/2018	

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Changing the Cell Format of a Column in Excel

It's important that format of the cells has been correctly set or you may experience issues further down the line.

1. Select the Column containing the fields you are going to change
2. Right click on any of the selected cells
3. Click on the Format Cells option
4. Select the Category

Note – Dates must be entered in the DD/MM/YYYY format

Click OK

Saving the Document as a CSV File

If your spreadsheet isn't already a CSV file, then you will need to change how it is saved so that it can be imported into OneFile.

1. Click on the File tab
2. Select the Save As option
3. Choose the location that the file should be saved
4. Locate the Save as type drop down list
5. Find and select the CSV (Comma delimited) option
6. Click Save
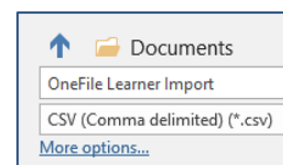
Import the CSV File

Now that the CSV has been saved to your computer, it's ready to be imported into OneFile.

1. Click on the Users icon
2. Click on the Learners or Learner Episodes tab
3. Click on the Bulk Import Learners button
4. Click the Choose File or Browse button and select the CSV file from your documents
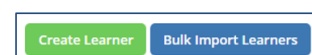
    Note – Tick the checkbox if your CSV file had column headings
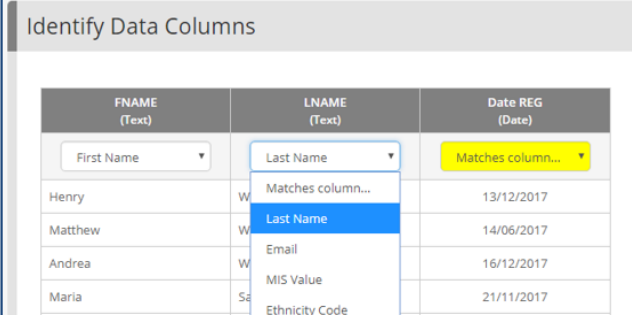5. Click Continue

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Match the Column Headings to OneFile Fields

You are now able to specify which column headings in your spreadsheet match the relevant fields in OneFile. To do this, select the relevant option in the down list.

If you are unable to see the right option, please check that the field can be imported and if the correct cell format has been selected on the CSV file.

Click Continue once all available columns have been matched.

Set Additional Details

You can now add the following information to the learners you are about to import:

·   Default Assessor
·   Class
·   Placement
·   Framework Template
·   Eportfolio Start Date

This can be done in bulk by selecting the options from the drop-down lists at the top of the page. Alternatively, you can edit each learner individually by selecting a different option on the row of the learner.

Complete the Import

You are now able to specify which column headings in your spreadsheet match the relevant fields in OneFile. To do this, select the relevant option in the down list.

If you are unable to see the right option, please check that the field can be imported and if the correct cell format has been selected on the CSV file.

Click Continue once all available columns have been matched.

To learn more about user roles see our full guide

https://live.onefile.co.uk/userguides/

Onefile

info.onefile.co.uk/onboarding