



Centre Manager Basics

How to create placements



Placements

A placement is usually the location or company that the learner is working at while completing their portfolio. The Placement can also be linked to an Employer and/or Observer account.

Preparation

The Centre Setting “Allow documents to be uploaded to placements” must be enabled to allow that feature.

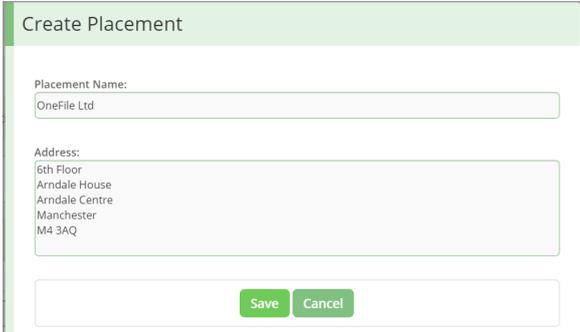
User Restrictions

Only Centre Managers & User Managers can create Placements. Permissions to “Manage Placement Details” and “Manage Placement Documents” are available for Centre Managers, User Managers and Assessors.

Create a Placement

To create a new Placement, follow the steps below:

1. Click on the Centre and then the Placements icon
2. Click on the Create Placement button
3. Enter the Placement Name and Address
4. Click the Save button



The screenshot shows a web form titled "Create Placement". It features a green header bar with the title. Below the header, there are two main input sections. The first is labeled "Placement Name:" and contains a text box with the value "OneFile Ltd". The second is labeled "Address:" and contains a text box with the value "6th Floor", "Arndale House", "Arndale Centre", "Manchester", and "M4 3AQ". At the bottom of the form, there are two buttons: "Save" and "Cancel".

You can now enter the details any of the other fields associated with the Placement:

- Contact Name
- Telephone Number & Extension
- Email
- Website
- Fax
- MIS Value (if MIS values enabled)

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Deleting / Archiving a Placement

A Placement can only be deleted if it hasn't been linked to a learner. you can easily tell if this is the case, as the Delete button will be visible at the bottom of the page.

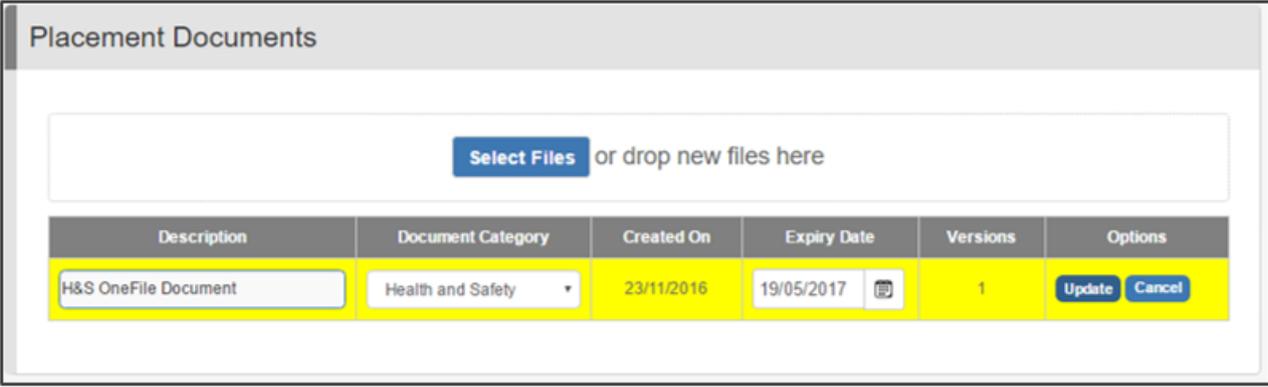
If the placement has been linked to a learner, but it no longer in use, untick the Placement is active checkbox and click the Save button to archive the Placement.

Placement Document

To upload a new placement document, drag and drop or click the Select Files button. When a document has been uploaded, you will be able to:

- Edit the description
- Select a document category
- Specify an Expiry Date

Click the Update button to save any changes.



The screenshot shows the 'Placement Documents' interface. At the top, there is a header 'Placement Documents'. Below it is a file upload area with a 'Select Files' button and the text 'or drop new files here'. Below the upload area is a table with the following columns: Description, Document Category, Created On, Expiry Date, Versions, and Options. The table contains one row with the following data:

Description	Document Category	Created On	Expiry Date	Versions	Options
H&S OneFile Document	Health and Safety	23/11/2016	19/05/2017	1	Update Cancel

As a default, two document categories will be available. Additional document categories can be created by a Centre Manager in the "Look-up Tables" icon.

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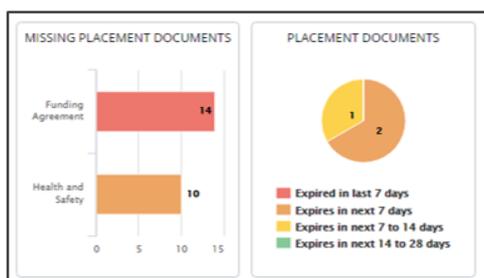
Placement Document Versions

When a document has expired, you can upload a new version by clicking the Upload New button. You will now be able to select a new file and specify the new expiry date. Click the Save button to upload the new version.



To view previous versions of a placement document, click on the number in the Versions column.

Document Versions				
Description	Version	Created Date	Expiry Date	Options
OneFile Ltd H&S with signatures	2	23/11/2016	10/10/2018	Delete
H&S OneFile Document	1	23/11/2016	19/05/2017	Delete

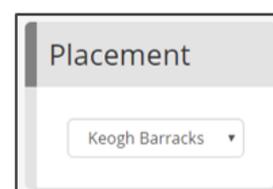


Note - The following dashboard charts can be enabled to show documents expired/ due to expire or placements without required documents.

Assigning a Placement to a Learner

When creating a new learner portfolio, you must select the learner's placement. If set in error, or you need to change it once the portfolio has been created, follow the steps below:

1. Click on the Users icon and click on the Learner Episodes tab
2. Locate the learner and click on their Episode button
3. Scroll down to the Placement section
4. Select the placement from the drop-down list
5. Click the Save button at the bottom of the page



This can be done by a Centre Manager or by an Assessor with permission to manage their learners, on the learner's Episode tab.

To learn more see our full guides
<https://www2.onefile.co.uk/userguidefiles>



info.onefile.co.uk/onboarding