

SKILLS: SDF Manual

FP&M SETA

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Important information to Note before registering as SDF:

1. ID / alternative ID number are key during the registration process

2. Scanned appointment letter from the Organization(s) to be on hand when accessing the system to register.

3. SDF's to know the L numbers as they will be required to link and search using the L number on the system

SDF Profiles on the system

- Primary SDF has the overall responsibility to submit the WSP/ATR forms on behalf of the organization; the Primary SDF can also capture the information on the WSP/ATR forms. (Please note that there will be only one Primary SDF profile assigned per organiasation)
- Contract SDF is appointed by the organization to support the Primary SDF to capture WSP/ATR forms; however they are not allowed to submit on behalf of the Primary SDF. The Contract SDF profile is available for e.g. Company Administrator/Data Capture, to provide support where there are large amounts of data that have to be submitted by the organization.
- Secondary SDF is appointed by the organization and has view access to the organization information e.g. HR manager. This profile has no capturing or editing rights on the system.

Steps	Action	Screenshot
1	Go to FP&MSETA Website: <u>www.fpmseta.or</u> g.za	
	Click on the " Stakeholder Login+Link	
2	Click on the	LOG IN
	Register an SDF	
	Link on the login	Username:
	page	Password:
		Login
		Forgot Password
		Register

REGISTER AS A NEW SKILLS DEVELOPMENT FACILITATOR (SDF)



Steps	Action	Screenshot
3	Click on Register	
	from the	REGISTRATION
	Registration Menu	
	Wielia -	SDF
		Register Cancel
4	Capture the	
	person's details	Applicant Details
	•	Title Ms 💌
		First Name Testing
		Middle Name
		Surname Mnguni
		Initials T
		ID No 8104170477089
		Alternate ID Type
		Dateof Birth 17/04/1981
		Gender Female 💌
		Equity Black: African
		Disability None -
		Home Language English 🔹
		Nationality South Africa
		Citizen Residential Status
		Socio Economic Status Unemployed
		Telephone Number 0114078945
5	Click on the Save	Save and Proceed
	and Proceed	
	<i>button</i> to move	
	to the next step.	
6	Upload the <i>Letter</i>	Organisation Details
	of Appointment	Organisation
	by clicking on the	Letter of Appointment: Select upload Browse
	Choose File	
	<i>button</i> then click	Save
	on Upload .	
		A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.
7	Click organisation	Organisation Details
		Organisation III L290762295 - CNBC Africa
		Letter of Appointment: Select upload Browse
		File is ready.
	Capture the SDL	
	number of your	
	organisation	
	And click search	
	And click search	



Steps	Action	Screenshot
		ORGANISATION
		SDL Number
	Organisation you selected will	
	show.	Select Cancel
	Click on browse for appointment letter then save	
		Home
		Organisation Details INDICIUM Organisation Indication Letter of Appointment: Select upload Indication
		File is ready. Save Remove
	Note you can be able to link	Organization Name SDL Number Status Document Name African Business News Limited L04074747 Doc2.docs First Previous News Last Go to Page
	yourself to more	Finalise Application A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.
	than one organisation and	
	upload	Home
	appointment letter	INDICIUM
	Click on the	Organisation Details
	magnifying glass to select an	Organisation IP L123323232 - 1 CONSTRUCTION REGIMENT Letter of Appointment: Select upload Browse
	Organisation, upload a Letter of	Save
	Appointment then click Save to	Remove Organisation Name SDL Number Status Document Name
	link it to your	African Business News Limited L040747471 Doc3.docx
	profile.	The South African Scriptwriter's Association N00000253 Doc3 docx 1 CONSTRUCTION REGIMENT L12332322 assement docx First Previous Next Last Go to Page
		Finalise Application
		A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.



Steps	Action	Screenshot		
8	Once the company is linked	Organisation Name	SDL Number S	tatus Document Name
	and the Letter of Appointment uploaded, it will	Crazyweb 2 First Previous Ne	2007/3697/14/7 xt Last Go to F	Document Upload example.xlsx
	appear as on the right.	Finalise Application		
	Proceed to click the <i>Finalise</i> <i>Application</i> <i>button</i> to submit the application			
	Then you will have to wait for FPMSETA	User reg		on was
	Approval to have access to the	success	sful	
	system	Please note that there a	are 3 steps to be co	mpleted during your application process on t
		Step 2 - link y	plete the personal o our organisation (L our letter of confirm	number; NLP etc.) Click the link tab at the bo
		Only when all 3 steps	are completed will	l your request be forwarded to the Region
		Details:		
		User Name:	Zulu	
		ID Number:	5504170477083	
		Gender:	Female	
		Population Group:	African	
		Username:	5504170477083	Please store your username and passw as you will be required to use them whe
		Password:	Zulu	
		SETA:	FPMSETA	



ACCESSING ORGANISATION INFORMATION

REGISTER OR REMOVE AN ORGANISATION

Steps	Action	Screenshot
1	Login into the	LOG IN
	system	
		Username:
		Password:
		Login
		Forgot Password
		Register
2	The Skills	SDF Dashboard SDF DASHBOARD - TESTING MNGUNI 7909280571089
	Development	Financial Year
	Facilitators	Search Your Details Register Organisations
	Dashboard will	Legal Name SDL Number Access Status Grant Status Grant Due Date Action
	open	African Business News Limited L290762295 Pending Created 30/04/2014
		First Previous Next Last Go to Page
3	Click on	SDF DASHBOARD - TESTING MNGUNI 7909280571089
	Register	Financial Year
	additional	Search Your Details Register Organisations
	Organisations	
	button	
4	Click on the	ORGANISATION DETAILS - TESTING MNGUNI 7909280571089
	magnifying glass	Organisation
	to select an	Letter of Appointment: Select upload Browse
	Organisation, upload a Letter	
	of Appointment	Save
	then click Save	
	to link it to your	Remove
	, profile.	Organisation Name SDL Number Status Document Name
		African Business News Limited L290762295 Pending contract number.docx
		First Previous Next Last Go to Page



Steps	Action	Screenshot
	Note that you	ORGANISATION DETAILS - TESTING MNGUNI 7909280571089
	can link yourself	Organisation III N000000264 - Academy of Guilds 'design in the making'
	to more than	Letter of Appointment: Select upload Browse
	one organisation	
	Click on the	Save
	magnifying glass	
	to select an	Remove
	Organisation,	Organisation Name SDL Number Status Document Name
	upload a <i>Letter</i>	African Business News Limited L040747471 Approved contract number.docx
	<i>of Appointment</i> then click <i>Save</i>	Test 2566666 Approved error.docx
		Academy of Forestry Contractors CC N00000012 Pending Company.docx
	to link it to your profile.	Academy of Guilds 'design in the making' N000000264 access forms (2).doc First Previous Next Last Go to Page Go to Page
	prome.	Thist Flevious Next Last Go to Fage
5	To remove an	ORGANISATION DETAILS - TESTING MNGUNI 7909280571089
	Organisation	
	Select the	Organisation
	record. The row	Letter of Appointment: Select upload Browse
	will be	
	highlighted	Save
	when selected	
	then click on the	Remove
	Remove button.	Organisation Name SDL Number Status Document Name
		African Business News Limited L290762295 Pending contract number dock
		First Previous Next Last Go to Page

EDIT SDF DETAILS

The section below outlines the process for editing the SDF's details

Steps	Action	Screenshot	
1	On the	SDF DASHBOARD - TESTING MNGUNI 790928057108	9
	Dashboard, click on Your Details	Financial Year Search Your Details Register Organisations Image: Search Image: Search<th></th>	
	button.	Legal Name SDL Number Access Status Grant Status Grant Due Date Action	
		African Business News Limited L290762295 Pending Created 30/04/2014 First Previous Next Last Go to Page	



Steps	Action	Screenshot	
2	Click on the Edit		PERSON DETAILS - TESTING MNGUNI 7909280571089
	<i>button.</i> Once	Edit	
	done, scroll to the	ID No	7909280571089
	bottom and click	Title	Ms
	Save.	First Name	Testing
		Middle Name	None
		Surname	Mnguni
		Initials	Т
		Alternate ID Type	0
		Date of Birth	28/09/1979
		Gender	Female
		Equity	Black: African
		Disability Status	None
		Home Language	English
		Nationality	South Africa
		Citizen Residential Status	South Africa
		Socio Economic Status	Unemployed
		Telephone Number	0114078945
		Cell Phone Number	0731728477

ACCESSING THE ORGANISATION DETAILS

Steps	Action	Screenshot
1	From the Dashboard,	Organisation Name SDL Number Status Document Name
	select the Organisation. The row will be highlighted when selected.	African Business News Limited L290762295 Pending contract number.docx First Previous Next Last Go to Page
	Click on the <i>Action</i> button to open the <i>Organisation's</i> profile.	Action
2	If the organisation does not appear on the Dashboard, click on the Search button.	SDF DASHBOARD - TESTING MNGUNI 7909280571089 Financial Year Search Your Details Register Organisations



Steps	Action	Screenshot		
3	Search for the Organisation by completing the capturing the SDL number	SDL Number Search Select Cancel	ORGANIS	SATION
4	Confirm the	OF	GANISATION DETAILS - 4 IMAGE (PTY) LTD (L510713607)
	SETA data is correct	Edit SDL Number Type	SETA	DHET
		SDL Number Possible SDL Number	L510713607 None	L510713607
	If there is any information to	Legal Name Trade Name Organisation Registration Number Type	4 Image (Pty) Ltd 4 Image 0	4 Image (Pty) Ltd 4 Image
	be updated, click on the Edit	Organisation Registration Number Organisation Registration Type Of Organisation SARS Number	4gem7MAPP07111436 0 L510713607	4gem7MAPP07111436 FET L510713607
	<i>button</i> , then	Cipro Number Legal Status/ Type of Entity Partnership	None Pty/Ltd Private	0 Pty /Ltd Private
	click <i>Save</i> to effect the	Parinersnip Phone Number Fax Number	0123491113 0123492846	0123491113 0123492846
	changes.	SIC Code Description Number Of Employees Number of Employees (Employment Profile)	0 0	0 0 0

ORGANISATIONAL CONTACT DETAILS

The section below outlines the process for adding/editing the organisation's contact person's details

Steps	Action	Screenshot
1	Click on Organisation Contact from the Organisation Menu	Skills >>Organisation >> Organisation Details Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms Grants and Levies Inter Seta Transfers Client Relationship Management EMP201 Research Annexure
2	Click on the Create button	Create



Steps	Action	Screenshot	
Steps 3	Action Capture the Contact's details and click the Save button.		
		E Mail Postal Code	
		Postal Address Line 1	
		Postal Address Line 2 Postal Address City	
		Postal Province Save Cancel	•

Please ensure that the contact details are correct and confirm the details before creating the new WSP forms.

ORGANISATIONAL BANKING DETAILS

The section below outlines the process for adding/editing Banking Details and uploading of stamped bank statement

Steps	Action	Screenshot
1	Click on Organisation Banking Details from the Organisation Menu	Skills >>Organisation >> Organisation Details Organisation Contact Person Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms Grants and Levies Inter Seta Transfers Client Relationship Management EMP201 Research Annexure
2	Click on the Edit button	Edit

Note only Primary SDF Profile can edit Organisation Bank details



Steps	Action	Screenshot	
3	Capture\Update the banking	Select Upload	ORGANISATION BANK DETAILS - 4 IMAGE (PTY) LTD (L510713607) Browse
	details then click the <i>Save button</i> .	Account Holder Bank Name Account Type Account Number Branch Name Branch Code Save Cancel	

UPLOAD STAMPED BANK STATEMENT

The section below outlines the process for uploading copy of bank statement

Steps	Action	Screenshot
1	Click on WSP & ATR Document	Skills >>Organisation >>
	Upload from Menu	Organisation Details Organisation Contact Person Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms WSP & ATR Forms WSP & ATR Document Uploads Grants and Levies Inter Seta Transfers Client Relationship Management Research Annexure
2	Click on the New	WSP & ATR DOCUMENT UPLOADS - TEST (2566666) Documentation Type Stamped Letter by bank
	<i>Document</i> button	New Document
3	Select the financial year then select Browse to upload document lastly click on upload	SEND DOCUMENT Financial Year Image: Colspan="2">Image: Colspan="2" Document Image: Colspan="2" Document Image: Colspan="2"
		Upload

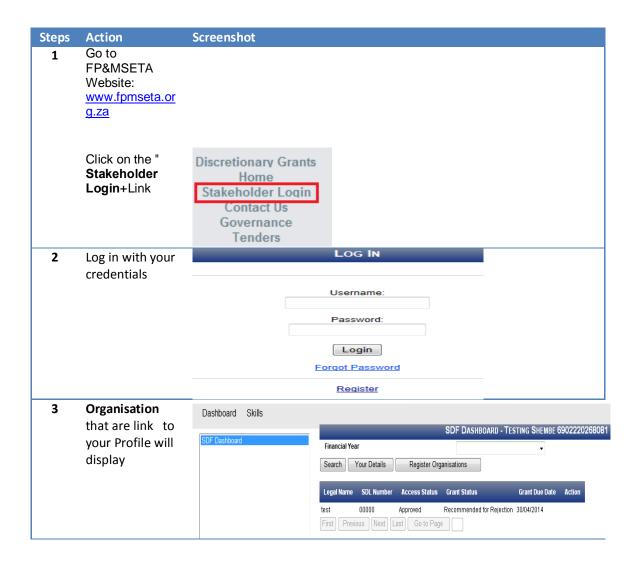


View Grant and Levies

SDF Profiles that can view Grant and Levies on the system

Note

• All Profiles i.e. **Primary, Secondary and Contract** SDF has access /right to view Grant and Levies in the system





Steps	Action	Screenshot
4	Click on the organisation to select organisation you want to open	SDF DASHBOARD - TESTING SHEMBE 6902220268081 Financial Year Search Your Details Register Organisations Legal Name SDL Number Access Status Grant Status Grant Due Date Action test 00000 Approved Recommended for Rejection 30/04/2014 Image: Colspan="2">Image: Colspan="2">Source Colspan="2">Recommended for Rejection Tirst Previous Next Last Go to Page Image: Colspan="2">Image: Colspan="2">Colspan="2">Colspan= 200000
	Then click on action icon to open	Action
5	Go to Grant and Levies	Skills >>Organisation >> Organisation Details Organisation Contact Person Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms WSP & ATR Forms WSP & ATR Porcument Uploads Grants and Levies Inter Seta Transfers Client Relationship Management Research Annexure
6	Select Financial year on the drop down	GRANTS AND LEVIES - TEST (N343433434) View Please select a Lewy Year from the combo box below. 01 April 2013 – 31 March 2014
7	Click on view button	GRANTS AND LEVIES - TEST (N343433434) View Please select a Lewy Year from the combo box below. 01 April 2013 – 31 March 2014



Steps	Action	Screenshot		
8	Click one option	Screensnot		
0	that you want to	Skills >>Organisatio	n >>Grants and Levie	es >>
	view			
	view	Grant Summary		
		Levies Summary		
		Financial Summa	ry	
0				
9	Click on Grant	Skills >>Organisation >>Grants and Levies >>		GRANT SUMMARY - TEST (N343433434)
	Summary system	Grant Summary Levies Summary	Print Friendly	
	will show Grant	Financial Summary Benefits		
	Summary on you	Bereika	Organisation Name	Test
	right hand side.		SDL Number	N343433434
			Financial Year	01 April 2013 – 31 March 2014
			Physical Address Line 1	123 Box
			Physical Address Line 2	Faerie Glen
			Physical Address Line 3	Pretoria Ekurhuleni Metro
			Municipality Postal Code	1612
			Postal Address Line 1	123 Box
			Postal Address Line 2	Faerie Glen
			Postal Address Line 3	Pretoria
		I		
	Click on Levies	Skills >>Organisation >>Grants and Levies	»	
	Summary to view	Grant Summany		LEVIES SUMMARY - TEST (N343433434
	Levies s	Levies Summary	Print Friendly	
		Financial Summary Benefits		
			Organisation Legal Name	Test
			Trade Name	Test
	Click on Financial		SDL Number	N343433434
	Summary to		Year of Statement	01 April 2013 – 31 March 2014
	View financial		Postal Address	1612
	Summary		Contact Telephone Number	123
	·		Fax Number	123
			Municipality	Ekurhuleni Metro
			Residential Address	123 Box



Steps	Action Se	creenshot		
		Skills >>Organisation >> Grants and Levies >> Grant Summary Levies Summary Financial Summary Benefits	Print Friendly	Financial Summary - Test (N343433434)
			Organisation Legal Name	Test
			Trade Name	Test
			SDL Number	N343433434
			Year of Statement	01 April 2013 – 31 March 2014
			Postal Address	1612
			Contact Telephone Number	123
			Fax Number	123
			Municipality	Ekurhuleni Metro
			Residential Address	123 Box

ORGANISATION CFO DETAILS

The section below outlines the process for adding/editing CEO's Details

Steps	Action	Screenshot
1	Click on Organisation CFO Details from the Organisation Menu	Skills >>Organisation >> Organisation Contact Person Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms WSP & ATR Forms WSP & ATR Document Uploads Grants and Levies Inter Seta Transfers Client Relationship Management Research Annexure
2	Click on the Edit button	Edit
3	Capture the CEO's contact details, then click the <i>Save</i> <i>button.</i>	ORGANISATION CFO DETAILS - 4 IMAGE (PTY) LTD (L510713607) First Name Surname Cell Phone Number Fax Number E Mail Save Cancel



TRAINING COMMITTEE

This section below outlines the process for adding/editing the Training Committee member's details. *This is only applicable for Medium and Large entities.*

Step	Action	Screenshot
1	Click on <i>Training</i> <i>Committee</i> from the <i>Organisation</i> <i>Menu</i>	Skills >>Organisation >> Organisation Details Organisation Contact Person Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms WSP & ATR Forms WSP & ATR Document Uploads Grants and Levies Inter Seta Transfers Client Relationship Management Research Annexure
2	Click on the Add Training Committee button	Add Training Committee
3	Capture the committee member's details then click on the <i>Save</i> <i>button</i> .	Training Committee Title • First Name • Surname • Initials • Designation • Designation Description • Telephone Number • Cell Phone Number • Fax Number • Position In Union • Save Cancel
4	To update the details, click on the record and it will be highlighted. Click on the <i>Action</i> icon to open the record.	First Name Surname Initials Description Telephone Number Cell Phone Number Fax Number E Mail Name Of Union Position In Union Update test testing t testing 012566665 0123366666 013333 bshembe@dts.co.za testing testing First Previous Next Last Go to Page



CREATING FORMS

The section below outlines the process for creating new forms for the financial year

Steps	Action	Screenshot
1	Select the current <i>financial year</i> from the combo box.	View Edit Print Financial Year 01 April 2014 – 31 March 2015 🔻 Create
	The page will refresh and the create button will become active.	
2	Click on the Create button	Create
3	Capture the <i>Number of</i> <i>Employees</i> and click the <i>Save</i> <i>button</i> .	CONFIRM ORGANISATION SIZE Verify Number Of Employees Save Cancel
4	Once the number of employees has been confirmed, the window on	View Edit Print Financial Year Create
	the right will appear. Click on View to see the forms.	Financial Year Form Type WSP Status Due Date Submitted Date Approved Date Rejected Date 01 April 2014 – 31 March 2015 Large/Medium Created 04/30/2014 First Previous Next Last Go to Page

- 1. Users can only create the current financial year's forms and not previous years.
- 2. Forms can only be created if all fields on the organisation information and contact details tab have been completed and confirmed to be correct.
- 3. The number of employee captured influences the type of Forms created.

Note

1. The information on this form will populate based on the information captured on the Organizations Information section and the SDF linked to the organization's.



2. Any information updated on this form, will populate. *E.g. If the Organisation telephone number is updated on the form and saved then the updated telephone number should be displayed on the organisation information section*

Banking Details

The section below outlines the process for filling Banking Details

Steps	Action	Screenshot
1	Click on Banking details from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments



2		Screenshot	
2	The		BANKING DETAILS - TEST (2566666)
	information		
	on this form	2250: File Name	FPMSETA ORGANISATION 05122013.doc
	is populated	Edit	
	based on	Bank Name	ABSA
	what is	Account Number	4555566
	captured on		
	Organisation	Account Holder	tets
	Banking	Account Type	Credit
	Details	Branch Name	he
	section.	Branch Code	01326
		Status	Approved

NOTE: If the banking details have changed, you are required to submit a signed and stamped letter from the bank for the new banking details. This is compulsory for your submission.

Section 1: Annual Training report

The section records the training that took place for 2013/2014

|--|



Steps	Action	Screenshot		
1	Click on <i>WSP</i> Section 1 from the WSP & ATR Forms Menu	Skills >>Organisation >>WSF Banking Details ATR Section 1: Annual Tr ATR Section 2: Annual Tr ATR Section 3: Annual Tr ATR Section 4: Adult Edu ATR Section 5: Trained P ATR Section 6: Trained P WSP Section 6: Trained P WSP Section 8: Planned WSP Section 8: Planned WSP Section 9: Planned WSP Section B1: Employ WSP Section B2: Province Impact Assessment Evaluation and Comment	raining Report raining Report(Em raining Report(Une cation and Trainin rivotal Training(Em rivotal Training(Un ce Skills Plan Pivotal Training Adult Education ment Summary ial Breakdown	
2	The information on this form is populated based on what is captured on Organisation Information and the SDF linked.	OFO Occupation Abrasive Wheel Maker Municipality African Male African Female African Disabled Coloured Male	EDIT ATR SECTION 1: ANNUAL TRAINING I	REPORT
	If there are any updates to be made, click on the Edit button	Coloured Female Coloured Disabled Indian Male Indian Female Indian Disabled White Male White Female White Disabled Age Below 35 Age Between 35 And 55 Age Above 55 Save Cancel	1 1 1 1 1 1 1 1 1 1 1 2 2 2	



Steps	Action	Screenshot	
3	Once the	ATR SECTION 1: ANNUAL TRAINING REPORT - TEST (2566666)	V
	information is	Create Edit Remove Excel Importer	
	captured and	Person Perso	on
	saved the user	Occupation OFO Municipality Male: Male: Male: Male: Female: Female: Female: Female: Total: Total: With With African Coloured Indian White African Coloured Indian White African Coloured Indian White Male Female Disability: Disabi	
	can be able to	African Colou	
	Edit or Remove	Abrasive Wheel Maker 712103 Abaqulusi 1 1 1 1 1 1 1 1 4 4 1 1	
	by Clicking on	1 1 1 1 1 1 1 4 4 1 1	_
	the information		
4	Alternatively the	ATR SECTION 1: ANNUAL TRAINING REPORT - TEST (2566666)
	SDF can capture	Create Edit Remove Excel Importer	
	information on		
	excel by clicking		
	Download Excel		
	importer		
5	Click on	· · · · · · · · · · · · · · · · · · ·	_
5	Download Excel	IMPORT EXCEL DATA	
	Template		
	remplate	Download Excel Template Upload file to Import	
		Browse	
		Didwae	
		Import Cancel	
6	After	🕅 🗔 🍽 🔹 🍽 🖛 Annual Training Report_D1.xlsx [Protected View] - Microsoft Excel	J
	downloading	File Home Insert Page Layout Formulas Data Review View 🛛 🕫 🖾	3
	excel please	Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing ×	
	capture information and	A B C D E	
		1 OFOOccupationDescription MunicipalityID AfricanMale AfricanFemale AfricanDisabled Colour	
	save in excel. NOTE	2 OFO Occupation Municipality Male: African Female: African Person With Disability: African Male:	
		3 Leave Empty Leav	
	Don't change	4 General Manager Public Service Ba-Phalaborwa 0 0 0	
	the name of the	5 Senior Police Officer Polokwane 5 0 1	
	template when	6	
	you save on		
	your documents for capturing.		



Steps	Action	Screenshot
Steps 7	Once the template is populated and all required information is capture Click on Browse to search for the saved template on your computer then	Screenshot IMPORT EXCEL DATA Download Excel Template Upload file to Import Browse Import Cancel
	click <i>Import</i> to upload.	

Section 2: Annual Training report Employed 2013/2014 The section records the training that took place for 2013/2014

Steps	Action	Screenshot					
1	Click on WSP Section 2 from the ATR Forms Menu	Screensnot Skills >> Organisation >> WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 3: Annual Training Report(Une ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Training ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments					
2	The page allows user to capture details then save	EDIT ATR SECT OFO Occupation Programme Type Name Of Programme Number Of Beneficiaries: Entry Level Number Of Beneficiaries: Intermediate Level Number Of Beneficiaries: Advanced Level Total Actual Cost Save Cancel	ION 2: ANNUAL TRAINING REPORT (EMPLOYED) Abrasive Wheel Maker Bursaries 4 4 4 4 200.00				



4	Alternatively	ATR SECTION 2: ANNUAL TRAINING REPORT(EMPLOYED) - TEST (256
-	Alternatively the SDF can	Create Edit Remove Excel Importer
	capture	
	information	
	on excel by	
	•	
	clicking	
	Download	
	Excel	
	importer	
5	Click on	
	Download	IMPORT EXCEL DATA
	Excel	Download Excel Template
	Template	Upload file to Import
	•	Browse
		Import Cancel
6	After	🕅 🚽 🔍 - 🐠 - 📮 🛛 AnnualTrainingReport_D1.xlsx [Protected View] - Microsoft Excel
	downloading	File Home Insert Page Layout Formulas Data Review View 🛛 🖓 🗆 🗊 🖄
	excel	
	capture	Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing X
	information	A B C D E
	and save in	1 OFOOccupationDescription MunicipalityID AfricanMale AfricanFemale AfricanDisabled Colour
	excel.	2 OFO Occupation Municipality Male: African Female: African Person With Disability: African Male:
	NOTE	3 Leave Empty Leave Empty Leave Empty Leave Empty Leave Empty Leave Empty Leave 4 General Manager Public Service Ba-Phalaborwa 0 0 0 0
	Don't	4 General Manager Public Service Ba-Phalaborwa 0 0 0 5 Senior Police Officer Polokwane 5 0 1
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	name of the	
	template	
	when you	
	save on your	
	documents	
	for	
	capturing.	
7	Once the	· · · · · · · · · · · · · · · · · · ·
'	template is	
	populated and	IMPORT EXCEL DATA
	all required	Download Excel Template
	information is	Upload file to Import
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	on Browse to	Import Cancel
	search for the	
	saved	
	template on	
	your	
	computer	
	then click	
	<i>Import</i> to	



	upload.								
8	8 Once the information		Remo		on 2: Annual	TRAINING REPORT(EM	IPLOYED) - TEST (2566666	5)	
	is captured and saved	Occupation	OFO Code	Type of Learning Programmes	Name Of Programme	Number Of Beneficiaries: Entry Level	Number Of Beneficiaries: Intermediate Level	Number Of Beneficiaries: Advanced Level	Tota Actu Cosi
	the user can be able	Abrasive Wheel Maker	712103	Bursaries		4	4	4	200.0
	to edit.	First Previo	ous Nex	t Last Go to Pa	0	4	4	4	

Section 3: Annual Training Report Unemployed The section records the planned training that is going to take place

Steps	Action	Screenshot	
1	Click on WSP Section 3 from the ATR Forms Menu	Skills >>Organisation >>WSP & ATR For Banking Details ATR Section 1: Annual Training Repo ATR Section 2: Annual Training Repo ATR Section 3: Annual Training Repo ATR Section 4: Adult Education and ATR Section 5: Trained Pivotal Traini ATR Section 6: Trained Pivotal Traini WSP Section 7: Workplace Skills Pla WSP Section 9: Planned Pivotal Traini WSP Section 9: Planned Pivotal Traini WSP Section 9: Planned Adult Educa WSP Section B1: Employment Summ WSP Section B2: Provincial Breakdor Impact Assessment Evaluation and Comments	ort ort(Em ort(Unt Trainin ing(Em ing(Un n n ning ation hary
2	Click on the Create button	ATR SECTION 3: AN	NUAL TRAINING REPORT (UNEMPLOYED) - TEST (2566
3	Capture the details and save	EDIT ATR SECTION OFO Occupation Programme Type Name Of Programme Number Of Beneficiaries: Entry Level Number Of Beneficiaries: Intermediate Level Number Of Beneficiaries: Advanced Level Total Actual Cost Save Cancel	Abrasive Wheel Maker Skills Programme 4



4	Once the	ATR S		nual Trainin	ig R eport (U ne	MPLOYED) - TEST (25666)	66)	
	record is	Create Edit Remove Excerimi	ponter					
	saved, one	Occupation OFO Type of Learn Code Programmes	ning Name Progra	Ben Ben	nber Of leficiaries: Entry	Number Of Beneficiaries: Intermediate Level	Number Of Beneficiaries: Advanced Level	Total Actua
	has the	Abrasivo Mihool		Lev	el			Cost
	option to	Morasive wheel 712103 Skills Programm Maker		4		6	5	300.00
	Edit or	First Previous Next Last G	o to Page	4		6	5	
	Remove it.							1
5	Alternatively,	r						
	you may use					IMPORT EXC	EL DATA	
	the Excel	Download Excel Template						
	Importer	Upload file to Import						
	template.				Brow	se		
	Click on the							
	Excel							
	Importer	Import Cancel						
	button							
6	After		nualTrainingPana	rt D1 vlav (Drotos	ted View1 Microso	off Event		
0	downloading				ted View] - Microso			
	-	File Home Insert Page Lay	out Formulas	Data Re	view View	⊘		
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		A	В	с	D	E		
	and save in		-	-		AfricanDisabled	Colour	
	excel.	2 OFO Occupation	Municipality	Male: African	Female: African	Person With Disability: Afri	can Male:	
	NOTE	3 Leave Empty	Leave Empty	Leave Empty	Leave Empty	Leave Empty	Leave	
	Don't	4 General Manager Public Service	Ba-Phalaborwa	0	0		0	
	change the		Polokwane	5	0		1	
	name of the	6						
	template							
	when you							
	save on your							
	documents							
	for							
	capturing.							
7	Once the	-						
	template is				l	MPORT EXCEL D	ATA	
	populated	Download Excel Template						
	and all	Upload file to Import						
	required				Browse			
	information							
	is capture							
	Click on	Import Cancel						
	<i>Browse</i> to							
	search for							
	the saved							
	template on							
	your							
	computer							
	then click							
	<i>Import</i> to							
1								



upload.							
Once the information	Create	t Remo		on 3: Annual 1	RAINING REPORT(UNE	mployed) - Test (256666	66)
is captured and saved	Occupation	OFO Code	Type of Learning Programmes	Name Of Programme	Number Of Beneficiaries: Entry Level	Number Of Beneficiaries: Intermediate Level	Number Of Beneficiaries: Advanced Level
the user can	Abrasive Wheel Maker		Skills Programme				
be able to edit by clicking on it then the Edit of Remove button will be active	First Previo	ous Nex	t Go to Pa	0 ge	4	6	5

Section 4: Adult Education and Training

The section records the planned training that is going to take place

Steps	Action	Screenshot
1	Action Click on WSP Section 4 from the ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown
2	Click on the	Impact Assessment Evaluation and Comments ATR SECTION 4: ADULT EDUCATION AND T
	Create button	Create Edit Remove Excel Importer Benefits Importer



Steps	Action	Screenshot
3	Capture the details and save	Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female Total Budgeted Cost Save Cancel
4	Once the record is saved, one has the option to <i>Edit</i> <i>or Remove it.</i>	ATR SECTION 4: ADULT EDUCATION AND TRAINING - TEST (2566666) Create Edit Remove Excel Importer Benefits Importer Name of the Course Number of Learners: Male Number of Learners: Female NQF Level Total Actual Cost testing 5 5 Level 05 500.00 First Previous Next Last Go to Page
5	Alternatively you can down load Excel Template then browse	IMPORT EXCEL DATA Download Excel Template Upload file to Import Browse Import Cancel
6	The screen on the right will appear. Click on Download Excel Template and save the template on your computer.	IMPORT EXCEL DATA ***********************************
7	Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.	IMPORT EXCEL DATA Download Excel Template Upload file to Import C:\Users\bayathandwas\Desktop\PlannedPiv Browse Import Cancel



Section 5: Trained Pivotal Training The section records the planned Pivotal Training that is going to take place for 2014/2015.

Steps	Action	Screenshot					
1	Click on <i>WSP</i> <i>Section 5</i> from the <i>ATR Forms</i> <i>Menu</i>	Skills >> Organisation >> WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(En ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments					
2	Click on the <i>Create button</i>	ATR SECTION 5: TRAINED PIVOTAL TRAINING(EMPLOYED) - TEST (2566666) Create Edit Remove Excel Importer					
3	Capture details and save	CREATE ATR SECT OFO Occupation PIVOTAL Programmes NQF Level Number of Beneficiaries Trained: Entry Level Number of Beneficiaries Trained: Intermediate Level Number of Beneficiaries Trained: Advanced Level Start Date End Date Total Actual Cost Save Cancel	ION 5: TRAINED PIVOTAL TRAINING(EMPLOYED)				



Λ	Once the record	ATR SECTION 5: TRAINED PIVOTAL TRAINING(EMPLOYED) - TEST (2566666)						
4	Once the record is saved, one has	A IR SECTION 5. TRAINED PIVOTAL TRAINING(EMPLOYED) - TEST (2000000)						
	the option to Edit or Remove it.	Occupation OFO Pivotal NOF Number Of Code Programme Level Level Level Level Level Cost						
		Abrasive Wheel 712103 Learnership Level 03 2 2 2 09 Jan 23 Jan 2000 00 Maker 21 2014 2015 2000 00						
		2 2 2 2000 First Previous Next Last Go to Page						
5	Alternatively you							
	can down load Excel Template	IMPORT EXCEL DATA						
	then browse	Download Excel Template Upload file to Import						
		Browse						
		Import Cancel						
6	The screen on the	IMPORT EXCEL DATA						
	right will appear.	Upload file to Import Browse						
	Click on	Import Cancel Windows Internet Explorer 🛛 🖾 What do you want to do with						
	Download Excel Template and	PlannedPivotalTrainingC3_Template.xlsx? Size 324 KB Type: Microsoft Excel 12 From: 177.149.145.34						
	save the template	rrain ants Occupation OFO Open						
	on your	Inin Code The file won't be saved automatically. V Abrasive Wheel Maker 712103 Save						
	computer.	ion First Previous (-> Save as						
7	Once the	Cancel						
/	template is	IMPORT EXCEL DATA						
	populated. Click	Download Excel Template						
	on <i>Browse</i> to	Upload file to Import						
	search for the	C:\Users\bayathandwas\Desktop\PlannedPiv Browse						
	saved template on your computer							
	then click <i>Import</i>	Import Cancel						
	to upload.							
4	Once the record	ATR SECTION 5: TRAINED PIVOTAL TRAINING(EMPLOYED) - TEST (25666666)						
	is saved, one has							
	the option to Edit	Occupation OFO Pivotal NOF Beneficiaries: Entry Intermediate Level Level Level Level Cost						
	or Remove it.	Abrasive Wheel 743403 Learnershin Level 03 2 2 2 09 Jan 23 Jan 2000 00						
		Maker 7/2/00 Ceannelsing Cerei do 2 2 2 2 2014 2015 200000 2 2 2 2 2 2 2014 2015 20000						
		First Previous Next Last Go to Page						



Section 6: Trained Pivotal Training The section records the planned Pivotal Training that is going to take place for 2014/2015.

Steps	Action	Screenshot				
1	Click on <i>WSP</i> Section 6 from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments				
2	Click on the <i>Create button</i>	ATR SECTION Create Edit Remove Excel Importer	6: TRAINED PIVOTAL TRAINING(UNEMPLOYED) - TEST (256			
3	Capture details and save	CREATE ATR SECTIO	on 6: Trained Pivotal Training(Unemployed)			
		OFO Occupation	🖉 Abrasive Wheel Maker			
		PIVOTAL Programmes	Internships			
		NQF Level	Level 08			
		Number of Beneficiaries Trained: Entry Level	2			
		Number of Beneficiaries Trained: Intermediate Level	3			
		Number of Beneficiaries Trained: Advanced Level	6			
		Start Date	15/01/2014			
		End Date	29/01/2015			
		Total Actual Cost	600			
		Save Cancel				



		1.00
4	Once the record is saved, one has	ATR SECTION 6: TRAINED PIVOTAL TRAINING(UNEMPLOYED) - TEST (25666666)
	the option to Edit or Remove it.	Occupation OFO Pivotal NQF Number Of Beneficiaries: Number Of Beneficiaries: Number Of Beneficiaries: Advanced Start End Actual Level Level Level Cost
		Abrasive Wheel 712103 Internships Level 08 2 3 6 15 Jan 29 Jan 600.00 Maker 2 3 6 2014 2015 600.00
5	Alternatively you can down load Excel Template then browse	First Previous Next Last Go to Page
		Browse
6	The screen on the right will appear. Click on Download Excel Template and save the template on your computer.	IMPORT EXCEL DATA Upload Excel Templaté Upload file to Import Browso Import Cancel Windows Internet Explorer W What do you want to do with PlannedPivotalTrainingC3_Template.xlsx? Size 38.4 KB Type Morable to Excel 12 Internet Occupation OFO Provide Abrashva 71210 Wheel Maker 71210 Save Save as Save as
7	Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.	IMPORT EXCEL DATA Download Excel Template Upload file to Import C:\Users\bayathandwas\Desktop\PlannedPiv Browse
4	Once the record is saved, one has the option to <i>Edit</i> <i>or Remove it.</i>	ATR SECTION 6: TRAINED PIVOTAL TRAINING(UNEMPLOYED) - TEST (25666666) Create Edit Remove Excel Importer Occupation OFO Pivotal Number Of Beneficiaries: Entry Number Of Beneficiaries: Advanced Start End Total Abrasive Wheel 712103 Internships Level 08 2 3 6 15 Jan 29 Jan 600.00 Kerr Lest Go to Page 2 3 6 500



Section 7 Workplace Skills plan This section record Workplace Skills Plane

Steps	Action	Screenshot				
1	Click on WSP	Skills >>Organisation >>WSP & ATR Forms >>				
	Section 7	Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Un ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(En ATR Section 6: Trained Pivotal Training(Ur WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments				
2	Click on the <i>Create button</i>	WSP SECTION 7: WORKPLACE SKILLS PLAN - TEST (2566666) Create Edit Remove Excel Importer				
3	Search for the OFO Code and	Edit WSP Section 7: Workplace Skills Plan				
	the fill in all					
	required	OFO Occupation IP Abrasive Wheel Maker				
	information and	Socio Economic Status Employed 💌				
	save	Programme Type Apprenticeships				
		Name Of Programme UAT Programme				
		African Male 1				
		Coloured Male 1				
		Indian Male 1				
		White Male 1				
		African Female 1				
		Coloured Female 1				
		Indian Female 1				
		White Female 1				
		African Disabled 0				
4	Once the record is saved, one has the option to Edit	WSP SECTION 7: WORKPLACE SKILLS PLAN - TEST (2566666)				
	or Remove it.	OFO Socio Type Of Name Of Male: Male: Male: Female: Female: Female: Female: Female: Female: Female: Female: Status Programme African Coloured Indian White African Coloured Indian White				
		Abrasive 712103 Abaqulusi Employed Apprenticeshipe UAT 1 1 1 1 1 1 1 1 4 Wheel Maker				
		First Previous Next Last Go to Page				



Section 8: Planned Pivotal Training

The section records the planned Pivotal Training that is going to take place for 2014/2015.

Steps	Action	Screenshot					
1	Click on <i>WSP</i> Section 8 from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments					
2	Click on the Create button	WSP SEC	CTION 8: PLANNED PIVOTAL TRAINING - TEST (2566666)				
3	Capture details and save	Edit WSP S	SECTION 8: PLANNED PIVOTAL TRAINING				
		OFO Occupation	P Account Clerk (Public Relations / Communication)				
		Socio Economic Status	Employed				
		PIVOTAL Programmes	Learnership				
		NQF Level	Level 05				
		Number of Beneficiaries Trained: Entry Level	2				
		Number of Beneficiaries Trained: Intermediate Level	2				
		Number of Beneficiaries Trained: Advanced Level	3				
		Estimated Start Date	22/01/2014				
		Estimated End Date	23/01/2015				
		Total Budgeted Cost	300.00				
		Save Cancel					



4	Once the record is saved, one has	WSP SECTION 8: PLANNED PIVOTAL TRAINING - TEST (2566666)
	the option to Edit or Remove it.	OFO Socio Pivotal NQF Number Of Number Of Socio Pivotal NQF Beneficiaries: Beneficiaries: Beneficiaries: Beneficiaries: Beneficiaries: Status Programme Level Entry Level Level Advanced Level Status
		Account Clerk (Public Relations / 441905 Employed Learnership Level 05 2 2 3 22 Jan 2014 23 Jan 2015 300.00 Communication)
		2 2 3 300
5	Alternatively you can down load Excel Template then browse	IMPORT EXCEL DATA Download Excel Template Upload file to Import Browse Import Cancel
6	The screen on the right will appear. Click on Download Excel Template and save the template on your computer.	Import Excel Termolate Ubload fie to Import Browse Import Cancel Windows Internet Explorer Volume Internet Explorer Occupation Of Open The file won't be saved automatically. Internet Providers Save Save as Cancel
7	Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.	IMPORT EXCEL DATA Download Excel Template Upload file to Import C:\Users\bayathandwas\Desktop\PlannedPiv Browse
4	Once the record is saved, one has the option to <i>Edit</i> <i>or Remove it.</i>	WSP SECTION 8: PLANNED PIVOTAL TRAINING - TEST (2566666) Create Edit Remove Excel Importer Occupation OFO Code Socio Economic Status Pivotal Programme Number Of Level Number Of Beneficiaries: Intermediate Level Number Of Beneficiaries: Intermediate Estimated Advanced Level Estimated End Date Total Dudgeted Cost Account Clerk (Phblic Relations / Communication) temployed Learnership Level 05 2 2 3 22 Jan 2014 23 Jan 2015 300.00 First Previous Next Last Go to Page 2 3 300



Section 9: Planned Pivotal Training The section records the planned Pivotal Training that is going to take place for 2014/2015.

Steps	Action	Screenshot				
1	Click on <i>WSP</i> Section 9 from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 6: Trained Pivotal Training WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments				
2	Click on the	WSP SECTION	I 9: PLANNED ADULT EDUCATION - TEST (2566666)			
	Create button	Create Edit Remove Excel Importer				
3	Capture details and save	CREATE WSF				
			SECTION 9: PLANNED ADULT EDUCATION			
		Name Of the Course	TEST			
		Name Of the Course	TEST			
		Name Of the Course AET Level	TEST Level 2 V			
		Name Of the Course AET Level Number Of Learners: Male	TEST Level 2 2			
		Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female	TEST Level 2 • 2			
4	Once the record	Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female Total Budgeted Cost Save Cancel	TEST Level 2 2 2 300			
4	Once the record is saved, one has the option to Edit	Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female Total Budgeted Cost Save Cancel	TEST Level 2 • 2			
4	is saved, one has	Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female Total Budgeted Cost Save Cancel WSP SECTION Create Edit Remove Excel Importer	TEST Level 2 • 2 2 300			
4	is saved, one has the option to Edit	Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female Total Budgeted Cost Save Cancel WSP SECTION Create Edit Remove Excel Importer Name of the Course Number of Learners: Male Numbe TEST 2 2 2	TEST Level 2 2 2 300 N 9: PLANNED ADULT EDUCATION - TEST (25666666) r of Learners: Female AET Level Total Budgeted Cost Level 2 300.00			
4	is saved, one has the option to Edit	Name Of the Course AET Level Number Of Learners: Male Number Of Learners: Female Total Budgeted Cost Save Cancel WSP SECTION Create Edit Remove Excel Importer Name of the Course Number of Learners: Male Number	TEST Level 2 2 2 300 I 9: PLANNED ADULT EDUCATION - TEST (25666666) r of Learners: Female AET Level Total Budgeted Cost			



5	Alternatively you	
	can down load	IMPORT EXCEL DATA
	Excel Template	Download Excel Template
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		Browse
		Import Cancel
6	The screen on the	A IMPORT EXCEL DATA
	right will appear.	Download Excel Template Upload file to Import Browse
	Click on	Import Cancel Windows Internet Explorer
	Download Excel	What do you want to do with PlannedPivotalTrainingC3_Template.xlsx?
	Template and	rt Greate Edit R Size: 38.4 K8 Type: Microsoft Excel 12 From: 197149145.34
	save the template	occupation OFO - Open
	on your	Inin Coore Inin The file won't be saved automatically. y Abrasive Wheel Maker 712103
	computer.	ing first Previous (Save as
		Cancel
7	Once the	
	template is	IMPORT EXCEL DATA
	populated. Click	Download Excel Template
	on Browse to	Upload file to Import
	search for the	C:\Users\bayathandwas\Desktop\PlannedPiv Browse
	saved template	
	on your computer	Import Cancel
	then click <i>Import</i>	Import Cancel
0	to upload.	WOD SECTION OF DEALWED ADJUST EDUCATION TEST (2566666)
8	Once the record	WSP SECTION 9: PLANNED ADULT EDUCATION - TEST (2566666)
	is saved, one has	Create Edit Remove Excel Importer
	the option to Edit	
	or Remove it.	Name of the Course Number of Learners: Male Number of Learners: Female AET Level Total Budgeted Cost
		TEST 2 2 Level 2 300.00
		2 2 300
		First Previous Next Last Go to Page



The following table below can be used as the guideline by the SDF when identifying the NQF Level learning Programmes across the above forms

NQF LEVEL	BAND	QUALIFICATION TYPE				
10		Post-doctoral research degrees				
9		Doctorates				
8		Masters degrees				
7	HIGHER EDUCATION AND	Professional Qualificat	tions			
	TRAINING	Honours degrees and				
6		National first degrees (3-yr) Higher diplomas				
5		National diplomas National certificates				
FURTHER EDUCATION AND TRAINING CERTIFICATE						
4		Grade 12 (Matric), Na	tional certificates			
3	FURTHER EDUCATION AND	Grade 11, National certificates				
2	TRAINING	Grade 10, National certificates				
GENERAL EDUCATION AND TRAINING CERTIFICATE						
1	GENERAL EDUCATION AND	Grade 9	ABET Level 4			
	TRAINING National certificates					

Capturing principles on the forms

The section below outlines capturing principles on the forms

Steps	Action	Screenshot	
1	OFO codes are	OFO Occupation	
	the 1st step in the capture process The	OFO Code OFO Description vehicle Search	
		OFO Code OFO Description	
		732203 Emergency Vehicle Drivers	
		335401 Motor Vehicle Licence Examiner	
		522302 Motorised Vehicle or Caravan Salesperson	
		733211 Remotely Operated Vehicle (ROV) Pilot	
		684905 Vehicle Body Builder	
		812201 Vehicle Detailer (Valet Servicer)	
		643202 Vehicle Painter 684906 Vehicle Trimmer	
		First Province Next Last Go to Page	
		 ✓ Select Cancel 	Þ.
2	Conturing type of	ATT: Iscnoi D: Awu, Tuwas Toori - Ancu Bunets Neel Lanto (13111255)	
2	Capturing type of	Com (2) Contactment	
	Programmes,	Ocupation 070 Municipality Mice Male Male Male Panke Panke Panke Panke Fanke Fanke Task Task Task Mice With Daability Hours With With With With With With With With	
	numbers of	AmonterPantos 2012 Augua 5 0 0 4 0 0 0 0 0 0 0 0 0 0 0 4 4 5 0 West-New 6222 Tehenvilles 3 1 0 0 0 0 0 0 4 0 0 0 0 0 0 0 0 0 0 0 0	
		General Hange Pale HTML Ba-Pademan 0 1 0 0 1 4 0 1 1 4 0 1 0 1 4 1 0 Senta	
	employees,	Sens Resolver 1122 Resens 5 0 0 0 0 0 0 0 5 0 1 0 0 0 0 0 0 0 0 0	
	disability status,	9 2 8 4 2 4 8 2 8 1 8 8 4 5 8 8 Ten man an California	



Steps	Action	Screensho	Screenshot							
	gender and age groups etc.	Person With Disability: African	Person With Disability: Coloured	Person With Disability: Indian	Person With Disability: White	Age: < 35	Age: 35 - 55	Age: > 55	Number Of Beneficiaries: Entry Level	

WSP Section B1: Employment Summary

The section below outlines the process for capturing the Employment Summary.

Steps	Action	Screenshot				
1	Click on WSP Section B from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 2: Annual Training Report(Une ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments				
2	Click on the	WSP SECTION B1: EMPLOYMENT SUMMARY - TEST (2566666)				
	Create button	Create Edit Remove Excel Importer				
3	Search for the OFO code and Geography by clicking on the magnifying icon next to them. Populate the rest of the form with the necessary information then click on Save .	EDIT WSP SECTION B1: EMPLOYMENT SUMMARY OFO Occupation Abrasive Wheel Maker African Male 1 Coloured Male 1 Indian Male 1 White Male 1 African Female 1 Coloured Female 1 Indian Female 1 White Female 1 Indian Jisabled 0				
		White Disabled 0 Age Below 35 2 Age Between 35 And 55 2 Age Above 55 4 Municipality Abaqulusi Province Freestate Save Cancel				



Steps	Action	Screenshot
4 Once the record is saved, one has the option to <i>Edit</i> or <i>Remove it</i> .	WSP SECTION B1: EMPLOYMENT SUMMARY - TEST (2566666) Create Edit Remove Excel Importer Occupation Municipality Province Male: Male: Male: Female: Female: Female: Total: With With With With With With With With With Male: Disability: Disability: Disability: Disability: Disability: Coloured Indian Winte African Coloured Indian Winte African Coloured African Coloured Indian Winte Male: Male:	
5	Alternatively, you may use the Excel Importer template. Click on the Excel Importer button.	IMPORT EXCEL DATA Download Excel Template Upload file to Import Browse Import Cancel
6	The screen on the right will appear. Click on Download Excel Template and save the template on your computer.	IMPORT EXCEL DATA Dominad Excel Y emplate Upload file to import C'Users'bayahadwas/Destrop/2014-01-11 Import Cancel Windows Internet Explorer Windows Internet Explorer What do you want to do with EmploymentSummaryB1_Templatexisx? Size 431 KB Type Microsoft Exel 12 From 191-10342534 Occupation Or Or The file won't be saved automatically. Abrative Save Save as Import Cancel
7	Once the template is populated. Click on <i>Choose file</i> to search for the saved template on your computer then click <i>Import</i> to upload.	Import Excel Data Download Excel Template Upload file to Import C:\Users\bayathandwas\Desktop\2014-01-10 Browse Import Cancel



B2: Provincial Breakdown

This section records the planned training for employees (employed and unemployed)

Step	Action	Screenshot	
1	Click on WSP Section B2 Provincial Breakdown	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Em ATR Section 5: Trained Pivotal Training(Un WSP Section 6: Trained Pivotal Training(Un WSP Section 6: Planned Pivotal Training WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments	
2	Click on the <i>Create button</i>	WSP SECTION B2: PROVINCIAL BREAKDOWN - TEST (2566666) Create Edit Remove Excel Importer	
3	Capture all required information Select the Municipality, City and Province then Save Populate the rest of the form with the necessary information then click on Save .	SDL Number Name Of Entity Number Of Employees Municipality City Province Save Cancel	
4	Once the record is saved, one has the option to Edit or Remove by clicking on it.	WSP SECTION B2: PROVINCIAL BREAKDOWN - TEST (2566666) Create Edit Remove Excel Importer SDL Number Name Of Entity Number Of Employees L45556 200 100 First Previous Next Last	



Impact Assessment

This section records the impact assessment

Step	Action	Screenshot				
1	Click on WSP Section C1 from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Emp ATR Section 3: Annual Training Report(Une ATR Section 3: Annual Training Report(Une ATR Section 5: Trained Pivotal Training(Emp ATR Section 6: Trained Pivotal Training(Une WSP Section 6: Trained Pivotal Training(Une WSP Section 7: Workplace Skills Plan WSP Section 9: Planned Adult Education WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments				
2	Click on the <i>Create</i> <i>button</i>	IMPACT ASSESSMENT - TEST (2566666) Create Edit Remove Excel Importer				
3	Capture all required information and save.	CREATE IMPACT ASSESSMENT Total Number Of Employed Learners Trained Total Number Of Unemployed Learners Trained Total Levies Paid For Period Total Amount Spent On Training Total Discretionary Grant Reveived From Fpm SETA How Did The Training Reported In The Atr And Ptr Affect The Company Of Unemployed Learners Affect The Company Of Unemployed Learners Affect The Company Of Unemployed Learners Demonstrated An Increase In The Productivity Save				
4 Once the IMPACT ASSESSMENT - TEST (2566666) record is		Create Edit Remove Excel Importer				
	saved, one has the	Total Number Of Total Number Of Total Total Total Total Total Training Affect Training Of Unemployed Learners Divisions Employed Learners Unemployed Learners Levies Amount Dicretionary Company Learners Affect Company And Processes Trained Trained Paid Spent Grant				
	option to Edit or Remove it but clicking on it.	500 200 100.00 100.00 200.00 tets test test				



Evaluation and Comments

This section records Evaluation and Comments

Step	Action	Screenshot				
1	Click on WSP Evaluation and Comments from the WSP & ATR Forms Menu	Skills >>Organisation >>WSP & ATR Forms >> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Une ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(En ATR Section 6: Trained Pivotal Training(Un WSP Section 7: Workplace Skills Plan WSP Section 8: Planned Pivotal Training WSP Section 9: Planned Adult Education WSP Section 9: Planned Adult Education WSP Section B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments				
2	Click on the <i>Create button</i>	EVALUATION AND COMMENTS - TEST (2566666) Create Edit Remove Excel Importer				
3	Answer all question and Save	Did You Experience any Challenges Completing Annexure 2? Does the Annexure 2 Assist in You Internal Planning and Reporting of Skills Development? Do You Have any Suggestions or Recommendations to Make on the Annexure 2 Process of the FPM SET A? Rate the Support Provider by FPM SETA Staff During the Annexure 2 Process Rate the Template Provider to Submit Your Annexure 2 Report to the FPM SETA Save Cancel				
4	Once the record is saved, one has the option to <i>Edit or Remove</i> <i>it.</i>	EVALUATION AND COMMENTS - TEST (2566666) Create Edit Remove Excel Importer Experience Any Challenges Does The Annexure 2 Assist in Internal Planning Suggestions Support Provider Rating Temp yes no yes Satisfactory Satisfactory Satisfactory Satisfactory				

Printing of the Forms

The section below outlines the process for capturing the Employment Summary.



Steps	Action	Screen	shot					
1	Click on <i>Print</i>	View Ed	t Print Su	WSP & ATR		ESS NEWS LIMITED (L2907622	95)	
2	The full report will be generated in PDF for download .Please print ,sign then submit	Table of Comma BETTOOT Assess 1: Market 1: Mar	19 (+ 33)	New d'Opsinie Datiga In Direktopent Ley (III, Natur	į	Non-June Tim Lend XX: Mina XY/FCID		
		SECTION F. AUTHORIZATION AND INTATIBULER SUPPORT - ANNULLE 1						
		We the undersigned, submit this inform	atos is follower of this entry's least obligation in	terms of the Solls Development Lepidation and Reminements. We declare t	Declaration fast to the best of our locardides, the information contained in this Assessme ? is account	its and up to date. We recognize that new inaccurate statement in this document many consister frond and he	subject to the full secondary of the law. Th	
		They the substrated in index of the endy log of dispands of the stall Development Legislation and Legislations and the stall of the start of the United gets of the Start of the						
				SEI Der	eloparest Committee (In the case of firm employing more than 50 employees)			
			Name and Surname	Telephone Number	Publics in Organization	Signature in confirm that the American's Two developed through a consultative process between the employer and the recognized Trade Union	Date of Separate	
		Person who completed the Annecure						
		2 Designated Employer Representative					1	
		Designated Employer Representative					1	
		Designated Employer Representative					ĺ	
		Designated Employee Representative						
		Designated Employee Representative						
		Designated Employer Representative						
		SCALL						
		Chief Enscuirée Officer (CEO) un Nominatel employer representative: Representative et de Labour Constitueurs: within die workplace, suppliced by the processioni strate mains:			Date of Separate Date of Separate	Date of Signature:		
		paymentiate at the Labour Countri	neri, arme en ancherer shompe pi e sec	Annual cases and	para a Spectre			

Authorisation page

The section below outlines the process for capturing the Employment Summary.

Steps	Action	Screenshot			
1	Click on WSP & ATR Document Uploads	Organisation Details Organisation Contact Person Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs Approve an SDF WSP & ATR Forms WSP & ATR Forms WSP & ATR Document Uploads Grants and Levies Inter Seta Transfers Client Relationship Management Research Annexure			
2	Select Authorisation Page	WSP & ATR DOCUMENT UPLOADS - AFRICAN BUSINESS NEWS LIMITED (L290762295) Documentation Type Authorisation Page New Document Remove			



Steps	Action	Screenshot
3	Then you can click submit	WSP & ATR FORMS - AFRICAN BUSINESS NEWS LIMITED (L290762295) View Edit Print Submit: Financial Year Create

The SDF will receive an e-mail notification to confirm the submission has been submitted on the FP&MSETA system.