

SKILLS: SDF Manual

FP&M SETA

03 February 2014

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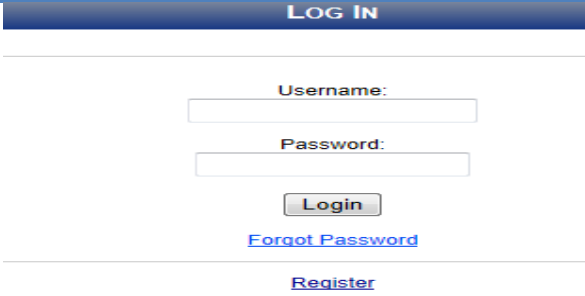
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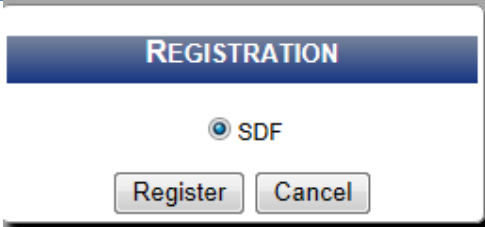
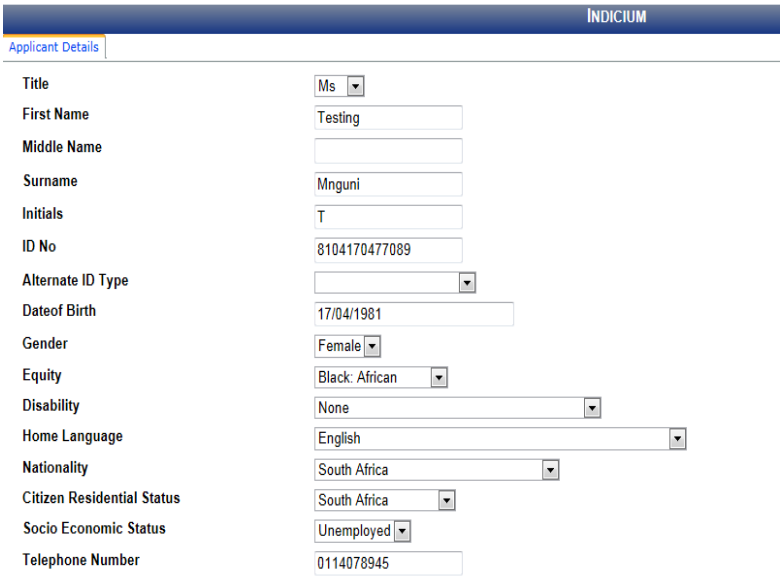
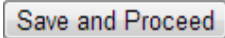
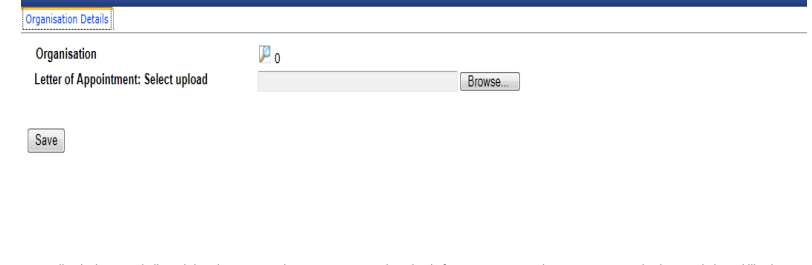
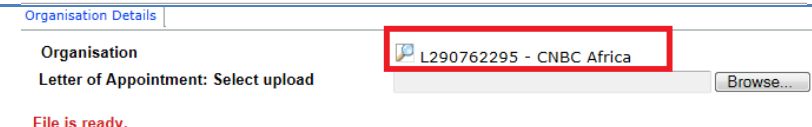
1. ID / alternative ID number are key during the registration process
2. Scanned appointment letter from the Organization(s) to be on hand when accessing the system to register.
3. SDF's to know the L numbers as they will be required to link and search using the L number on the system

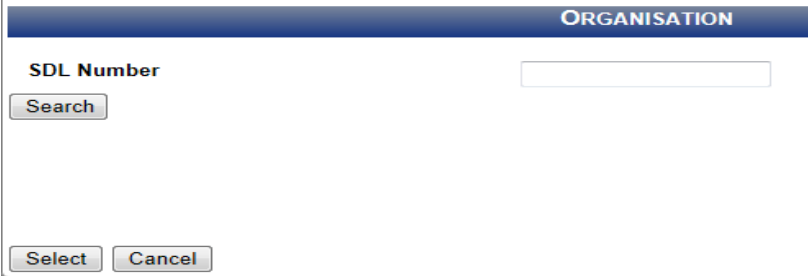
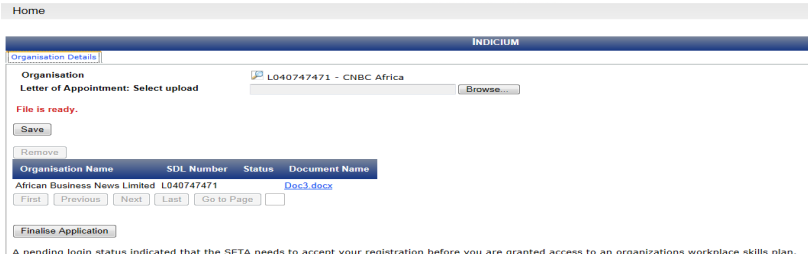
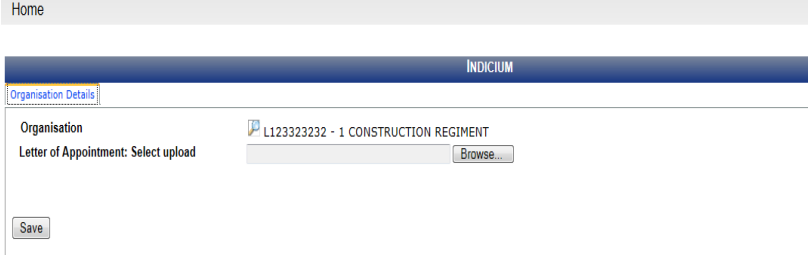
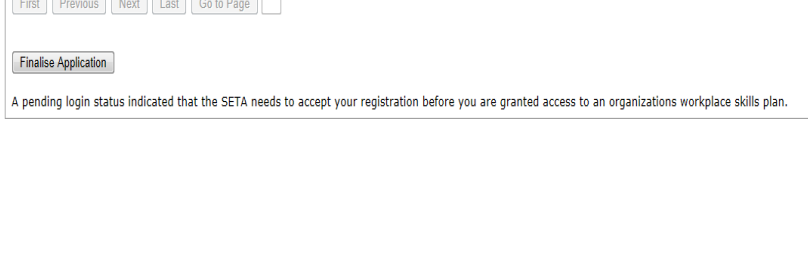
SDF Profiles on the system

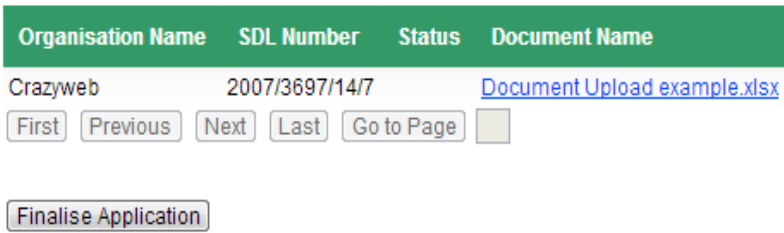
- Primary SDF has the overall responsibility to submit the WSP/ATR forms on behalf of the organization; the Primary SDF can also capture the information on the WSP/ATR forms. (Please note that there will be only one Primary SDF profile assigned per organisation)
- Contract SDF is appointed by the organization 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.

REGISTER AS A NEW SKILLS DEVELOPMENT FACILITATOR (SDF)

Steps	Action	Screenshot
1	Go to FP&MSETA Website: www.fpmseta.org.za Click on the " Stakeholder Login+Link "	
2	Click on the Register an SDF Link on the login page	 <p>The screenshot shows a login interface with a dark blue header containing the text "LOG IN". Below the header are two input fields: "Username:" and "Password:". Underneath the password field is a "Login" button. At the bottom of the form area, there are two links: "Forgot Password" and "Register".</p>

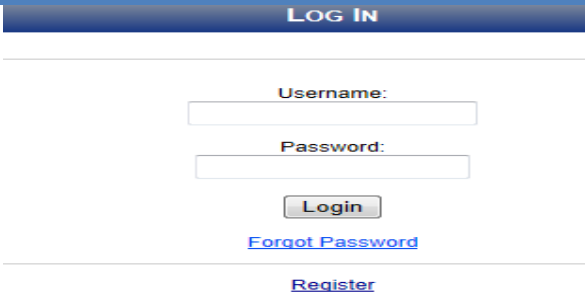
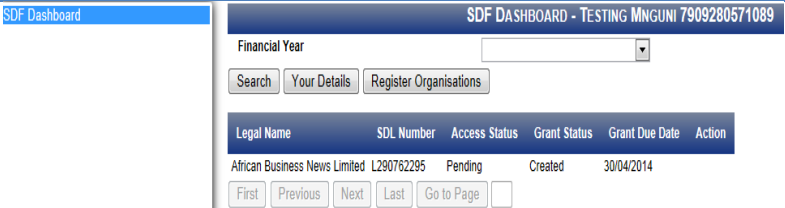
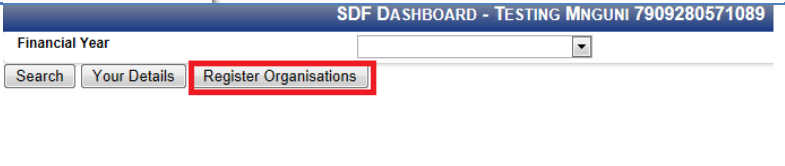
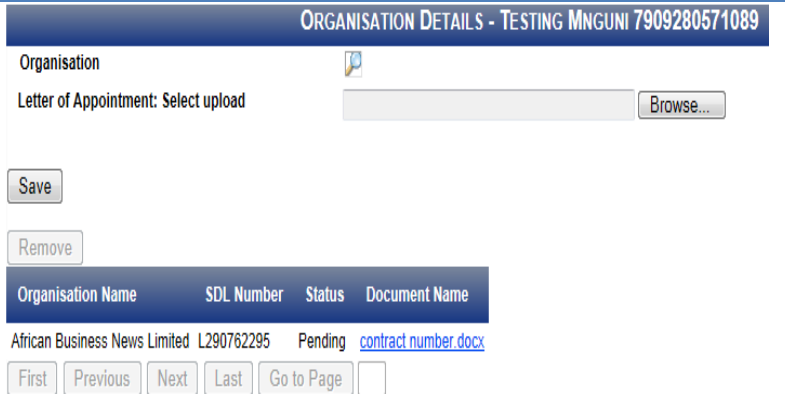
Steps	Action	Screenshot
3	Click on Register from the Registration Menu	
4	Capture the person's details	
5	Click on the Save and Proceed button to move to the next step.	
6	Upload the Letter of Appointment by clicking on the Choose File button then click on Upload .	 <p>A pending login status indicated that the SETA needs to accept your registration before you are granted access to an organizations workplace skills plan.</p>
7	Click organisation	 <p>File is ready.</p>
	Capture the SDL number of your organisation And click search	

Steps	Action	Screenshot																
	<p>Organisation you selected will show.</p>																	
	<p>Click on browse for appointment letter then save</p>																	
	<p>Note you can be able to link yourself to more than one organisation and upload appointment letter</p>																	
	<p>Click on the magnifying glass to select an Organisation, upload a Letter of Appointment then click Save to link it to your profile.</p>	 <table border="1" data-bbox="690 1354 1104 1480"> <thead> <tr> <th>Organisation Name</th> <th>SDL Number</th> <th>Status</th> <th>Document Name</th> </tr> </thead> <tbody> <tr> <td>African Business News Limited</td> <td>L040747471</td> <td></td> <td>Doc3.docx</td> </tr> <tr> <td>The South African Scriptwriter's Association</td> <td>N000000253</td> <td></td> <td>Doc3.docx</td> </tr> <tr> <td>1 CONSTRUCTION REGIMENT</td> <td>L123323232</td> <td></td> <td>asement.docx</td> </tr> </tbody> </table>	Organisation Name	SDL Number	Status	Document Name	African Business News Limited	L040747471		Doc3.docx	The South African Scriptwriter's Association	N000000253		Doc3.docx	1 CONSTRUCTION REGIMENT	L123323232		asement.docx
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Steps	Action	Screenshot
8	<p>Once the company is linked and the Letter of Appointment uploaded, it will appear as on the right.</p> <p>Proceed to click the Finalise Application button to submit the application</p> <p>Then you will have to wait for FPMSETA Approval to have access to the system</p>	 <p>User registration was successful ...</p> <p>Please note that there are 3 steps to be completed during your application process on the system</p> <p><i>Steps 1 - complete the personal details page</i> <i>Step 2 - link your organisation (L number; NLP etc.) Click the link tab at the bottom of the page</i> <i>Step 3 - add your letter of confirmation</i></p> <p>Only when all 3 steps are completed will your request be forwarded to the Region</p> <p>Details:</p> <p>User Name: Zulu</p> <p>ID Number: 5504170477083</p> <p>Gender: Female</p> <p>Population Group: African</p> <p>Username: 5504170477083</p> <p>Password: Zulu</p> <p>SETA: FPMSETA</p> <p>Please store your username and password as you will be required to use them when you log in</p>

ACCESSING ORGANISATION INFORMATION

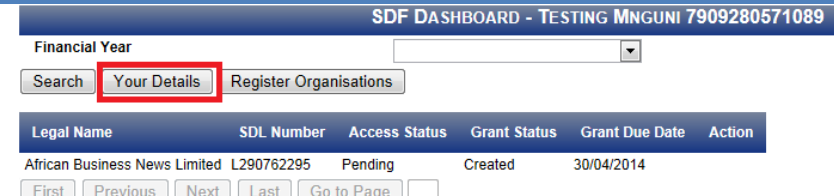
REGISTER OR REMOVE AN ORGANISATION

Steps	Action	Screenshot
1	Login into the system	
2	The Skills Development Facilitators Dashboard will open	
3	Click on Register additional Organisations button	
4	Click on the magnifying glass to select an Organisation , upload a Letter of Appointment then click Save to link it to your profile.	

Steps	Action	Screenshot																				
	<p>Note that you can link yourself to more than one organisation</p> <p>Click on the magnifying glass to select an Organisation, upload a Letter of Appointment then click Save to link it to your profile.</p>	 <p>ORGANISATION DETAILS - TESTING MNGUNI 7909280571089</p> <p>Organisation: N000000264 - Academy of Guilds 'design in the making'</p> <p>Letter of Appointment: Select upload <input type="text"/> <input type="button" value="Browse..."/></p> <p><input type="button" value="Save"/> <input type="button" value="Remove"/></p> <table border="1"> <thead> <tr> <th>Organisation Name</th> <th>SDL Number</th> <th>Status</th> <th>Document Name</th> </tr> </thead> <tbody> <tr> <td>African Business News Limited</td> <td>L040747471</td> <td>Approved</td> <td>contract number.docx</td> </tr> <tr> <td>Test</td> <td>2566666</td> <td>Approved</td> <td>error.docx</td> </tr> <tr> <td>Academy of Forestry Contractors CC</td> <td>N000000012</td> <td>Pending</td> <td>Company.docx</td> </tr> <tr> <td>Academy of Guilds 'design in the making'</td> <td>N000000264</td> <td></td> <td>access forms (2).doc</td> </tr> </tbody> </table> <p><input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Go to Page"/> <input type="text"/></p>	Organisation Name	SDL Number	Status	Document Name	African Business News Limited	L040747471	Approved	contract number.docx	Test	2566666	Approved	error.docx	Academy of Forestry Contractors CC	N000000012	Pending	Company.docx	Academy of Guilds 'design in the making'	N000000264		access forms (2).doc
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5	<p>To remove an Organisation Select the <i>record</i>. The row will be highlighted when selected then click on the Remove button.</p>	 <p>ORGANISATION DETAILS - TESTING MNGUNI 7909280571089</p> <p>Organisation: <input type="text"/></p> <p>Letter of Appointment: Select upload <input type="text"/> <input type="button" value="Browse..."/></p> <p><input type="button" value="Save"/> <input type="button" value="Remove"/></p> <table border="1"> <thead> <tr> <th>Organisation Name</th> <th>SDL Number</th> <th>Status</th> <th>Document Name</th> </tr> </thead> <tbody> <tr> <td>African Business News Limited</td> <td>L290762295</td> <td>Pending</td> <td>contract number.docx</td> </tr> </tbody> </table> <p><input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Go to Page"/> <input type="text"/></p>	Organisation Name	SDL Number	Status	Document Name	African Business News Limited	L290762295	Pending	contract number.docx												
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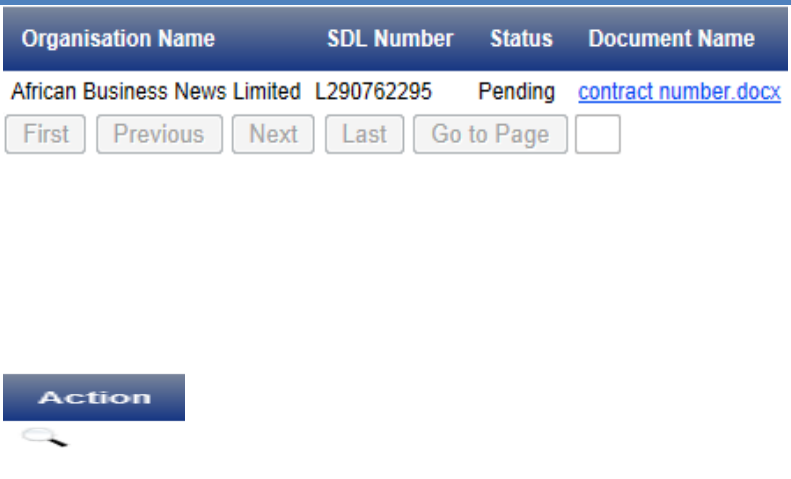
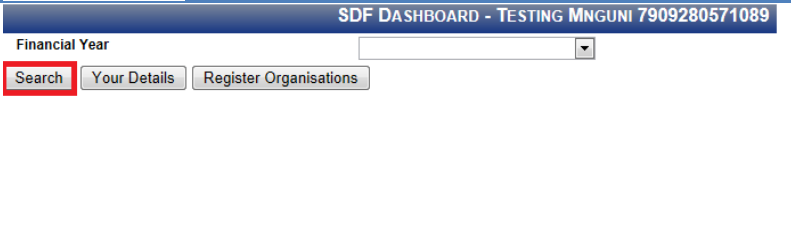
EDIT SDF DETAILS

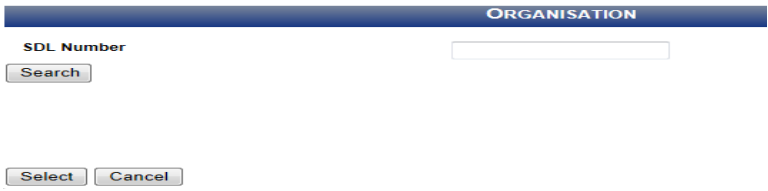
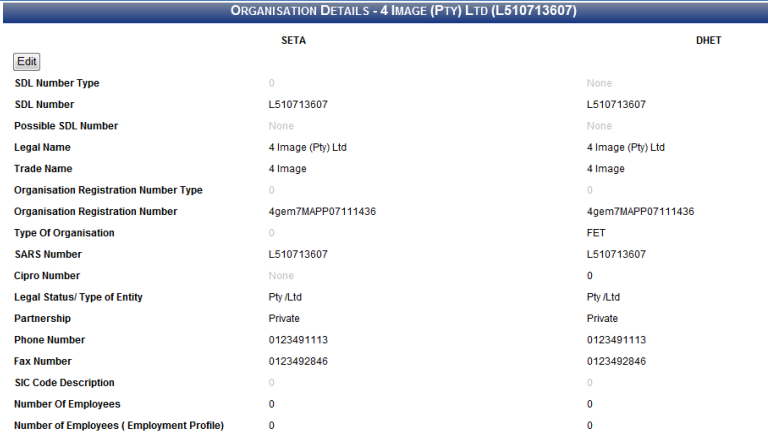
The section below outlines the process for editing the SDF's details

Steps	Action	Screenshot												
1	<p>On the Dashboard, click on Your Details button.</p>	 <p>SDF DASHBOARD - TESTING MNGUNI 7909280571089</p> <p>Financial Year: <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Your Details"/> <input type="button" value="Register Organisations"/></p> <table border="1"> <thead> <tr> <th>Legal Name</th> <th>SDL Number</th> <th>Access Status</th> <th>Grant Status</th> <th>Grant Due Date</th> <th>Action</th> </tr> </thead> <tbody> <tr> <td>African Business News Limited</td> <td>L290762295</td> <td>Pending</td> <td>Created</td> <td>30/04/2014</td> <td></td> </tr> </tbody> </table> <p><input type="button" value="First"/> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Last"/> <input type="button" value="Go to Page"/> <input type="text"/></p>	Legal Name	SDL Number	Access Status	Grant Status	Grant Due Date	Action	African Business News Limited	L290762295	Pending	Created	30/04/2014	
Legal Name	SDL Number	Access Status	Grant Status	Grant Due Date	Action									
African Business News Limited	L290762295	Pending	Created	30/04/2014										

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

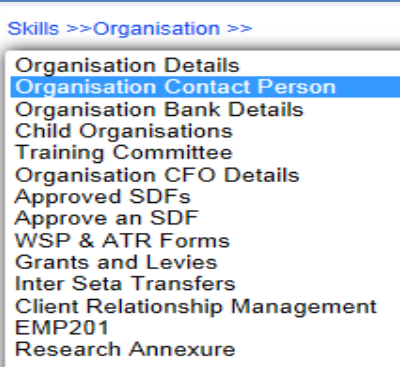
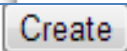
ACCESSING THE ORGANISATION DETAILS

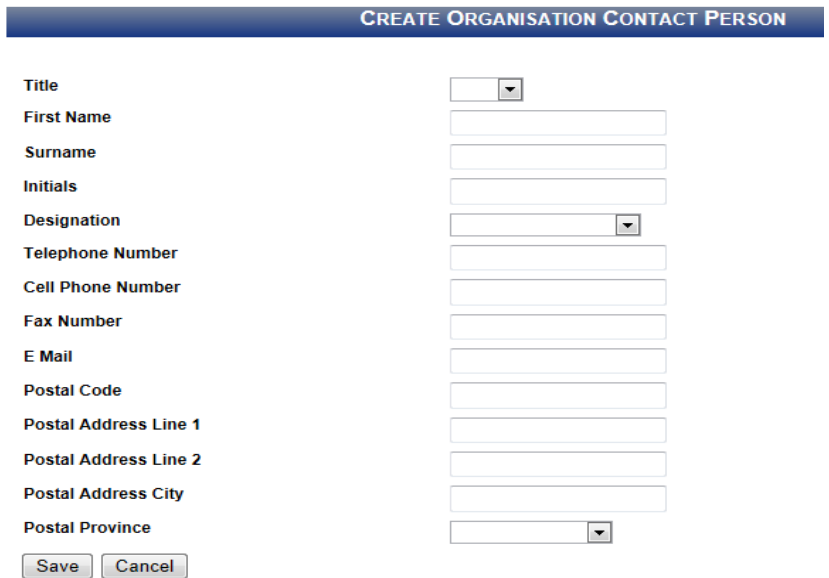
Steps	Action	Screenshot								
1	<p>From the Dashboard, select the Organisation. The row will be highlighted when selected.</p> <p>Click on the Action button to open the Organisation's profile.</p>	 <p>SDF DASHBOARD - TESTING MNGUNI 7909280571089</p> <table border="1"> <thead> <tr> <th>Organisation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

Steps	Action	Screenshot																																																						
3	Search for the Organisation by completing the capturing the SDL number																																																							
4	Confirm the SETA data is correct If there is any information to be updated, click on the Edit button , then click Save to effect the changes.	 <table border="1"> <thead> <tr> <th></th> <th>SETA</th> <th>DHET</th> </tr> </thead> <tbody> <tr> <td>SDL Number Type</td> <td>0</td> <td>None</td> </tr> <tr> <td>SDL Number</td> <td>L510713607</td> <td>L510713607</td> </tr> <tr> <td>Possible SDL Number</td> <td>None</td> <td>None</td> </tr> <tr> <td>Legal Name</td> <td>4 Image (Pty) Ltd</td> <td>4 Image (Pty) Ltd</td> </tr> <tr> <td>Trade Name</td> <td>4 Image</td> <td>4 Image</td> </tr> <tr> <td>Organisation Registration Number Type</td> <td>0</td> <td>0</td> </tr> <tr> <td>Organisation Registration Number</td> <td>4gem7MAPP07111436</td> <td>4gem7MAPP07111436</td> </tr> <tr> <td>Type Of Organisation</td> <td>0</td> <td>FET</td> </tr> <tr> <td>SARS Number</td> <td>L510713607</td> <td>L510713607</td> </tr> <tr> <td>Cipro Number</td> <td>None</td> <td>0</td> </tr> <tr> <td>Legal Status/ Type of Entity</td> <td>Pty /Ltd</td> <td>Pty /Ltd</td> </tr> <tr> <td>Partnership</td> <td>Private</td> <td>Private</td> </tr> <tr> <td>Phone Number</td> <td>0123491113</td> <td>0123491113</td> </tr> <tr> <td>Fax Number</td> <td>0123492846</td> <td>0123492846</td> </tr> <tr> <td>SIC Code Description</td> <td>0</td> <td>0</td> </tr> <tr> <td>Number Of Employees</td> <td>0</td> <td>0</td> </tr> <tr> <td>Number Of Employees (Employment Profile)</td> <td>0</td> <td>0</td> </tr> </tbody> </table>		SETA	DHET	SDL Number Type	0	None	SDL Number	L510713607	L510713607	Possible SDL Number	None	None	Legal Name	4 Image (Pty) Ltd	4 Image (Pty) Ltd	Trade Name	4 Image	4 Image	Organisation Registration Number Type	0	0	Organisation Registration Number	4gem7MAPP07111436	4gem7MAPP07111436	Type Of Organisation	0	FET	SARS Number	L510713607	L510713607	Cipro Number	None	0	Legal Status/ Type of Entity	Pty /Ltd	Pty /Ltd	Partnership	Private	Private	Phone Number	0123491113	0123491113	Fax Number	0123492846	0123492846	SIC Code Description	0	0	Number Of Employees	0	0	Number Of Employees (Employment Profile)	0	0
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Partnership	Private	Private																																																						
Phone Number	0123491113	0123491113																																																						
Fax Number	0123492846	0123492846																																																						
SIC Code Description	0	0																																																						
Number Of Employees	0	0																																																						
Number Of Employees (Employment Profile)	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	
2	Click on the Create button	

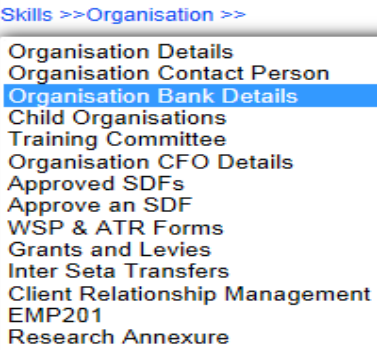

Steps	Action	Screenshot
3	Capture the Contact's details and click the Save button.	

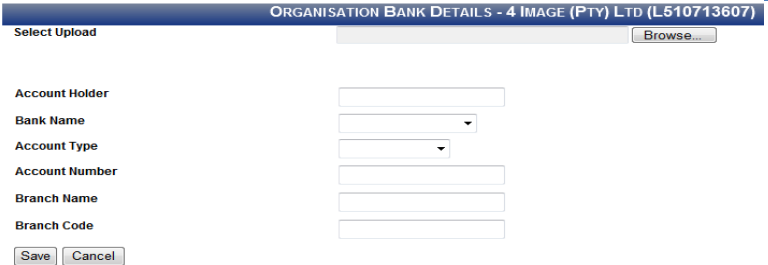
Please ensure that the contact details are correct and confirm the details before creating the new WSP forms.

ORGANISATIONAL BANKING DETAILS

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

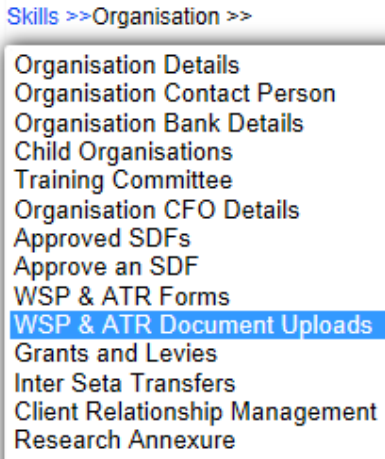

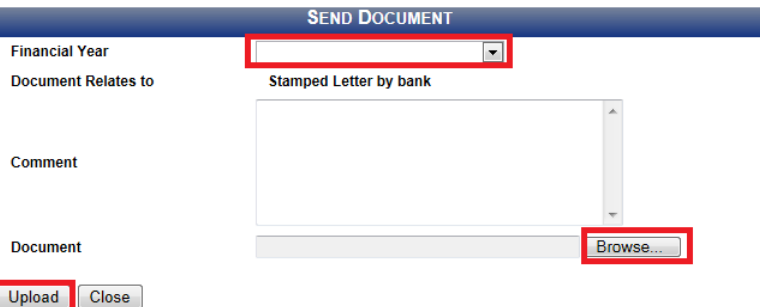
Note only Primary SDF Profile can edit Organisation Bank details

Steps	Action	Screenshot
1	Click on Organisation Banking Details from the Organisation Menu	
2	Click on the Edit button	

Steps	Action	Screenshot
3	Capture\Update the banking details then click the Save button .	

UPLOAD STAMPED BANK STATEMENT

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


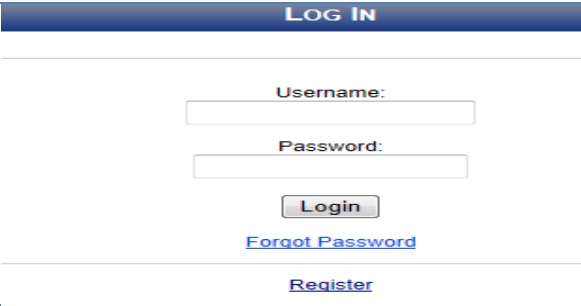
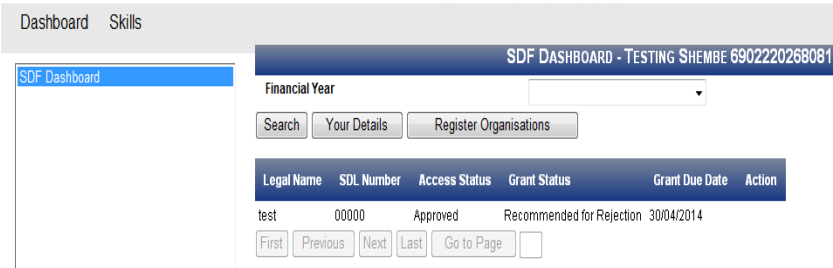
Steps	Action	Screenshot
1	Click on WSP & ATR Document Upload from Menu	
2	Click on the New Document button	
3	Select the financial year then select Browse to upload document lastly click on upload	

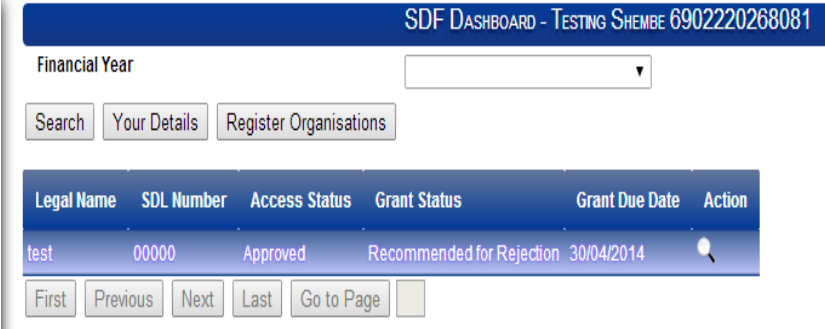

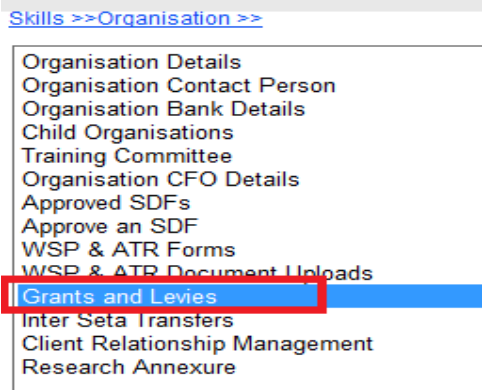
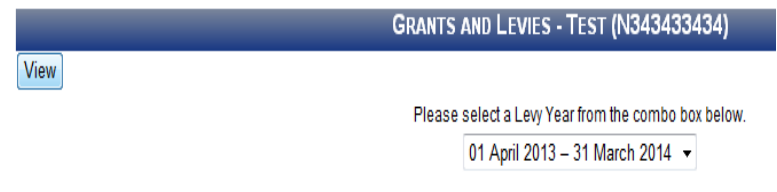
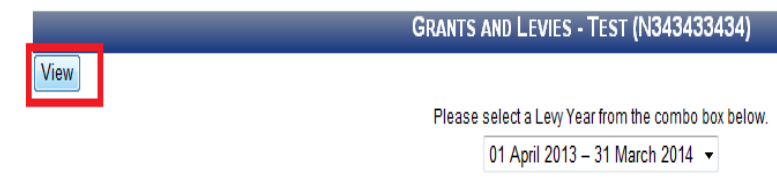
View Grant and Levies

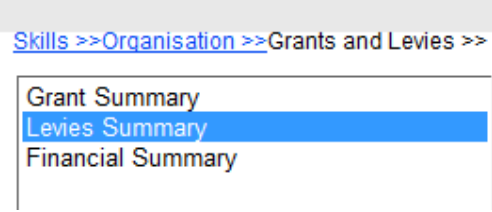
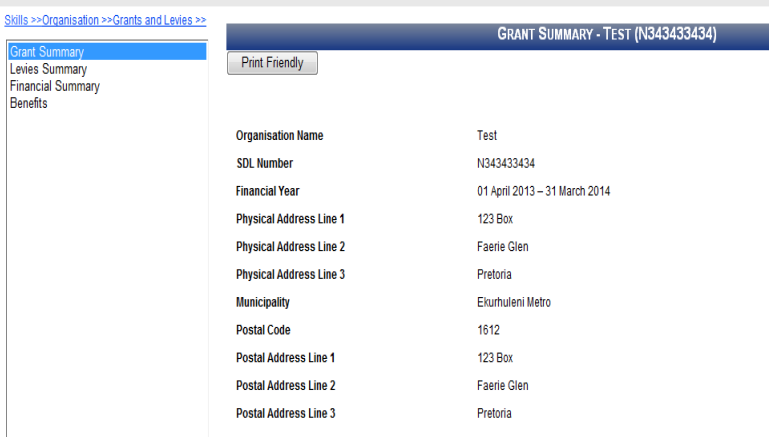
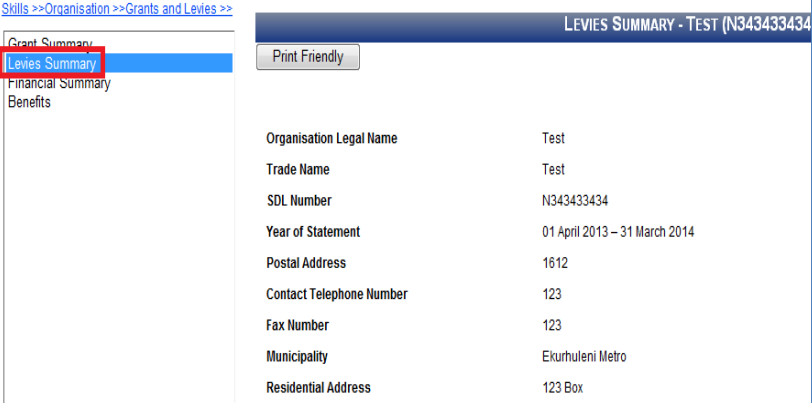
SDF Profiles that can view Grant and Levies on the system

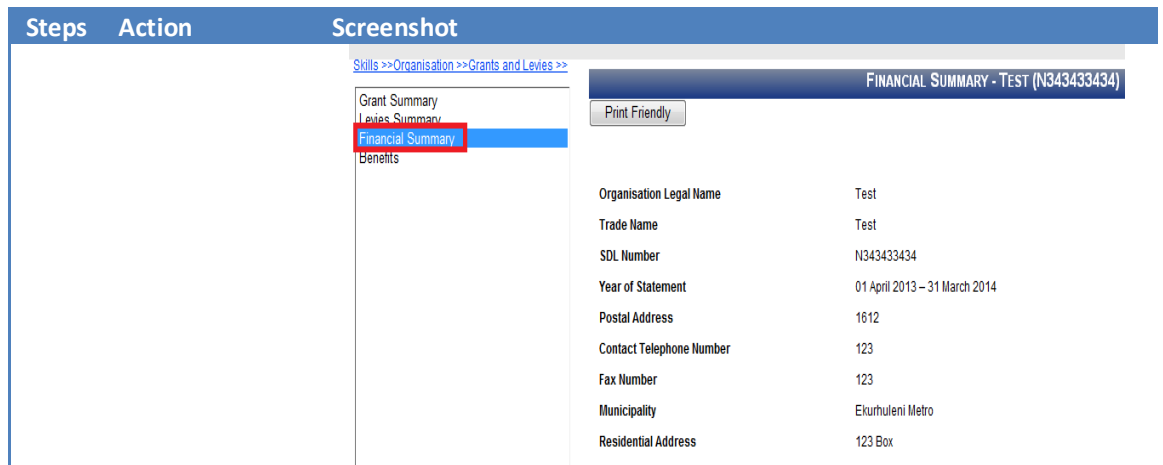
Note

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

Steps	Action	Screenshot
1	Go to FP&MSETA Website: www.fpmseta.org.za Click on the " Stakeholder Login " + Link	
2	Log in with your credentials	
3	Organisation that are link to your Profile will display	

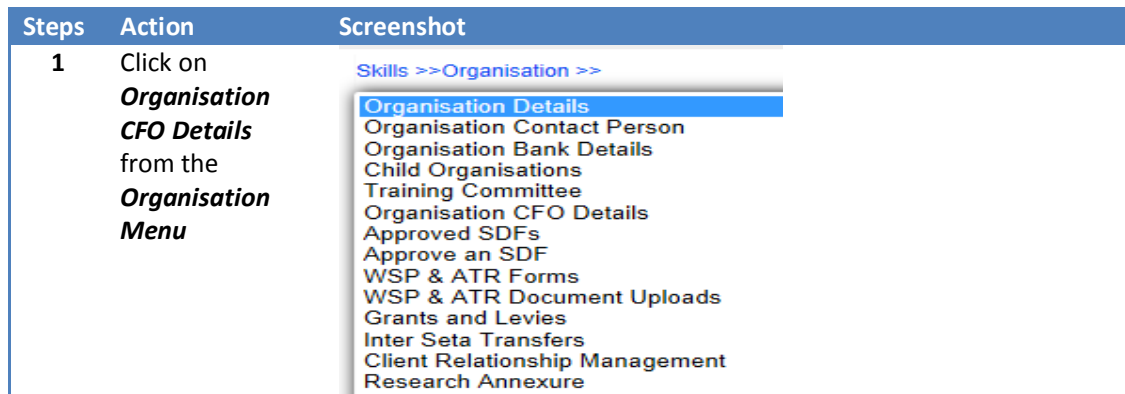

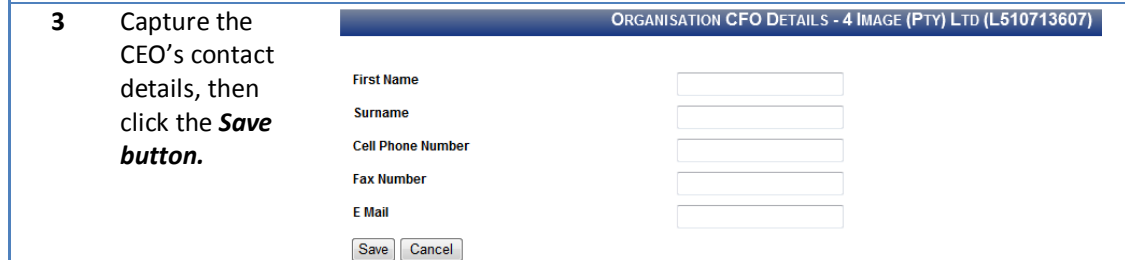
Steps	Action	Screenshot
4	Click on the organisation to select organisation you want to open	 <p>Then click on action icon to open</p> 
5	Go to Grant and Levies	
6	Select Financial year on the drop down	
7	Click on view button	

Steps	Action	Screenshot																						
8	Click one option that you want to view	 <p>Skills >> Organisation >> Grants and Levies >></p> <ul style="list-style-type: none"> Grant Summary Levies Summary Financial Summary 																						
9	Click on Grant Summary system will show Grant Summary on your right hand side.	 <p>Skills >> Organisation >> Grants and Levies >></p> <p>GRANT SUMMARY - TEST (N343433434)</p> <p>Print Friendly</p> <table border="1"> <tr><td>Organisation Name</td><td>Test</td></tr> <tr><td>SDL Number</td><td>N343433434</td></tr> <tr><td>Financial Year</td><td>01 April 2013 – 31 March 2014</td></tr> <tr><td>Physical Address Line 1</td><td>123 Box</td></tr> <tr><td>Physical Address Line 2</td><td>Faerie Glen</td></tr> <tr><td>Physical Address Line 3</td><td>Pretoria</td></tr> <tr><td>Municipality</td><td>Ekurhuleni Metro</td></tr> <tr><td>Postal Code</td><td>1612</td></tr> <tr><td>Postal Address Line 1</td><td>123 Box</td></tr> <tr><td>Postal Address Line 2</td><td>Faerie Glen</td></tr> <tr><td>Postal Address Line 3</td><td>Pretoria</td></tr> </table>	Organisation Name	Test	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	Municipality	Ekurhuleni Metro	Postal Code	1612	Postal Address Line 1	123 Box	Postal Address Line 2	Faerie Glen	Postal Address Line 3	Pretoria
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	Click on Levies Summary to view Levies s	 <p>Skills >> Organisation >> Grants and Levies >></p> <p>LEVIES SUMMARY - TEST (N343433434)</p> <p>Print Friendly</p> <table border="1"> <tr><td>Organisation Legal Name</td><td>Test</td></tr> <tr><td>Trade Name</td><td>Test</td></tr> <tr><td>SDL Number</td><td>N343433434</td></tr> <tr><td>Year of Statement</td><td>01 April 2013 – 31 March 2014</td></tr> <tr><td>Postal Address</td><td>1612</td></tr> <tr><td>Contact Telephone Number</td><td>123</td></tr> <tr><td>Fax Number</td><td>123</td></tr> <tr><td>Municipality</td><td>Ekurhuleni Metro</td></tr> <tr><td>Residential Address</td><td>123 Box</td></tr> </table>	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				
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Municipality	Ekurhuleni Metro																							
Residential Address	123 Box																							
	Click on Financial Summary to View financial Summary																							

Steps	Action	Screenshot
		

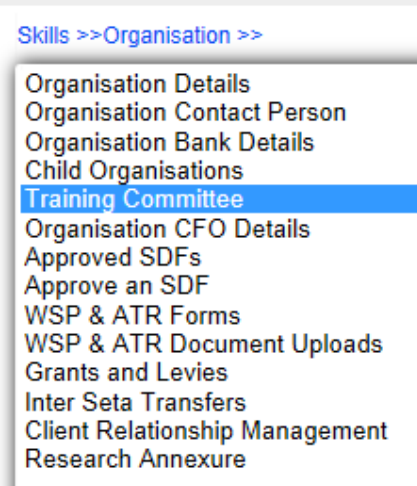
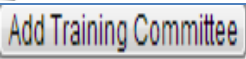
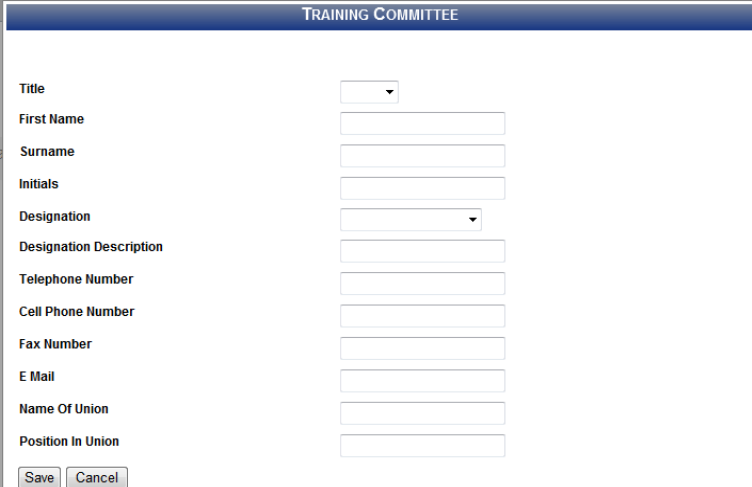

ORGANISATION CFO DETAILS

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	
2	Click on the Edit button	
3	Capture the CEO's contact details, then click the Save button .	

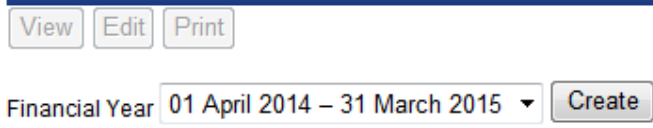
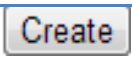
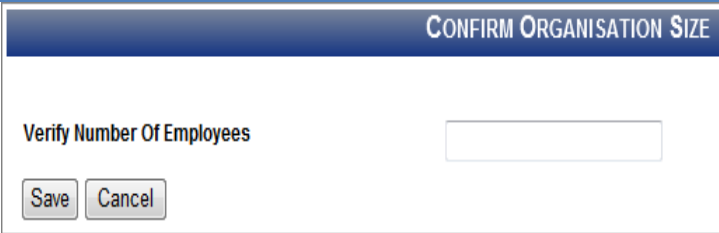
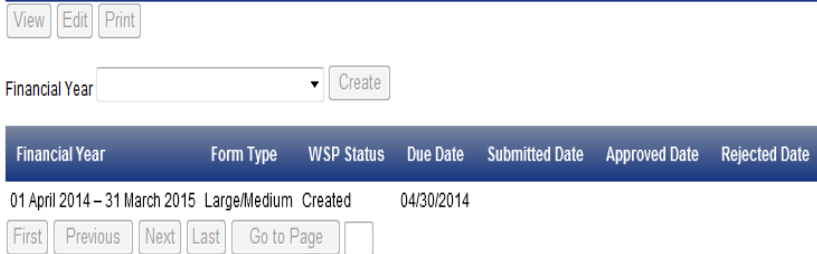
TRAINING COMMITTEE

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 Training Committee from the Organisation Menu	 <p>Skills >> Organisation >></p> <ul style="list-style-type: none"> 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 Document Uploads Grants and Levies Inter Seta Transfers Client Relationship Management Research Annexure 																						
2	Click on the Add Training Committee button																							
3	Capture the committee member's details then click on the Save button .																							
4	To update the details, click on the record and it will be highlighted. Click on the Action icon to open the record.	 <table border="1"> <thead> <tr> <th>First Name</th> <th>Surname</th> <th>Initials</th> <th>Designation Description</th> <th>Telephone Number</th> <th>Cell Phone Number</th> <th>Fax Number</th> <th>E Mail</th> <th>Name Of Union</th> <th>Position In Union</th> <th>Update</th> </tr> </thead> <tbody> <tr> <td>test</td> <td>testing</td> <td>t</td> <td>testing</td> <td>0125666665</td> <td>0123366666</td> <td>013333</td> <td>tshembe@dtss.co.za</td> <td>testing</td> <td>testing</td> <td></td> </tr> </tbody> </table> <p>First Previous Next Last Go to Page</p> <p>Action</p>	First Name	Surname	Initials	Designation Description	Telephone Number	Cell Phone Number	Fax Number	E Mail	Name Of Union	Position In Union	Update	test	testing	t	testing	0125666665	0123366666	013333	tshembe@dtss.co.za	testing	testing	
First Name	Surname	Initials	Designation Description	Telephone Number	Cell Phone Number	Fax Number	E Mail	Name Of Union	Position In Union	Update														
test	testing	t	testing	0125666665	0123366666	013333	tshembe@dtss.co.za	testing	testing															

CREATING FORMS

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

Steps	Action	Screenshot
1	Select the current financial year from the combo box. The page will refresh and the create button will become active.	
2	Click on the Create button	
3	Capture the Number of Employees and click the Save button .	
4	Once the number of employees has been confirmed, the window on the right will appear. Click on View to see the forms.	

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.

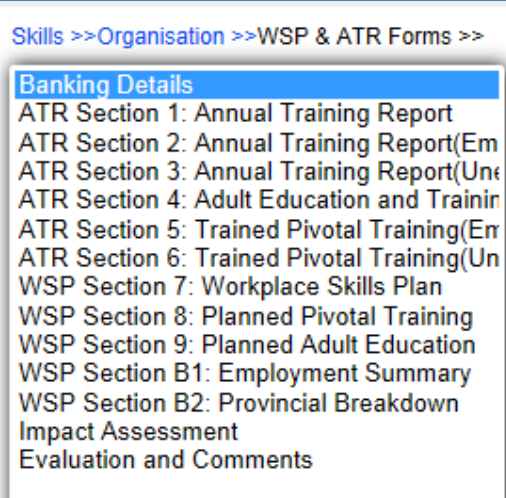
Note

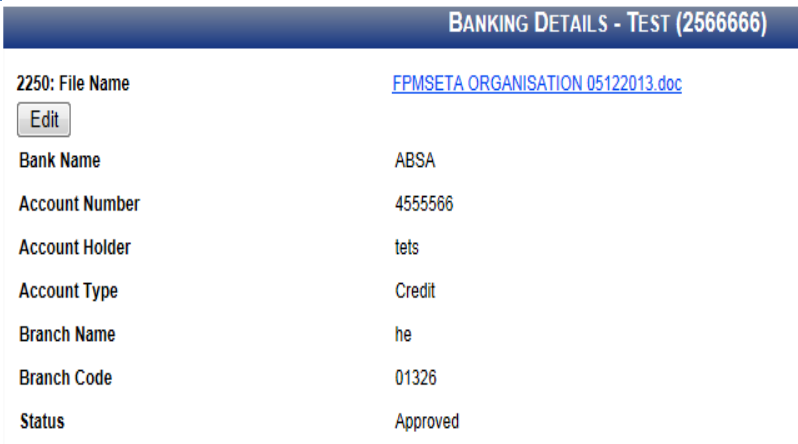
1. The information on this form will populate based on the information captured on the Organizations Information section and the SDF linked to the organization's.

- 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	 <p>The screenshot shows a navigation path: Skills >> Organisation >> WSP & ATR Forms >> Banking Details. Below this, a list of menu items is displayed, including ATR Section 1 through 6, WSP Section 7 through 9, WSP Section B1 and B2, Impact Assessment, and Evaluation and Comments.</p>

Steps	Action	Screenshot
2	The information on this form is populated based on what is captured on Organisation Banking Details section.	 <p>The screenshot shows a form titled "BANKING DETAILS - TEST (2566666)". It contains the following fields:</p> <ul style="list-style-type: none"> 2250: File Name: FPMSETA ORGANISATION 05122013.doc Bank Name: ABSA Account Number: 4555566 Account Holder: tets Account Type: Credit Branch Name: he 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.

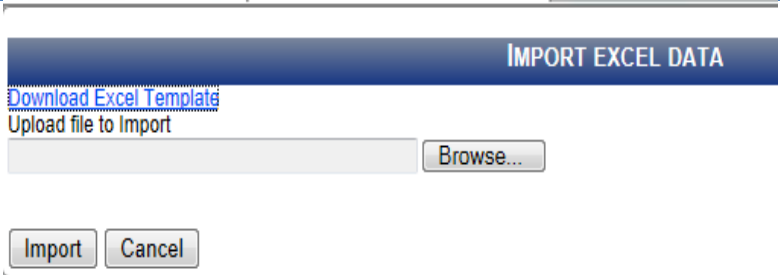
Section 1: Annual Training report

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

Steps	Action	Screenshot
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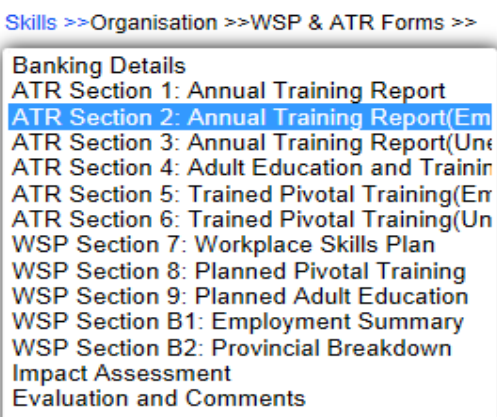
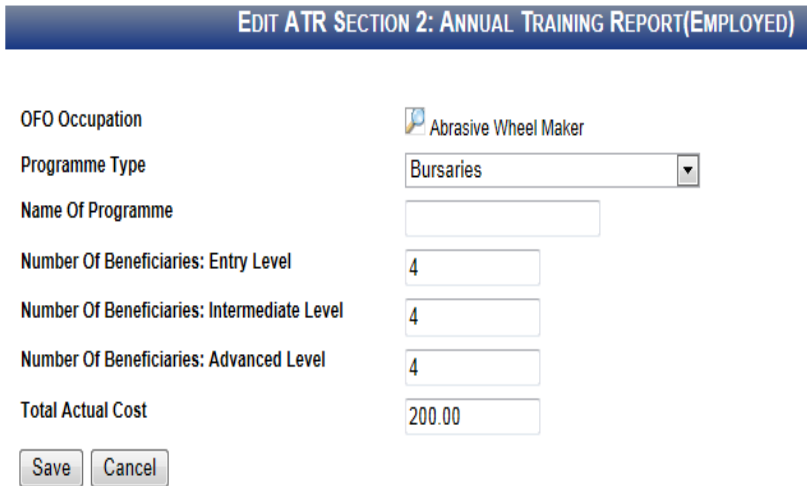
Steps	Action	Screenshot																														
1	Click on WSP Section 1 from the WSP & ATR Forms Menu	<p>Skills >> Organisation >> WSP & ATR Forms >></p> <p>Banking Details</p> <p>ATR Section 1: Annual Training Report</p> <p>ATR Section 2: Annual Training Report(Em</p> <p>ATR Section 3: Annual Training Report(Un</p> <p>ATR Section 4: Adult Education and Trainin</p> <p>ATR Section 5: Trained Pivotal Training(Em</p> <p>ATR Section 6: Trained Pivotal Training(Un</p> <p>WSP Section 7: Workplace Skills Plan</p> <p>WSP Section 8: Planned Pivotal Training</p> <p>WSP Section 9: Planned Adult Education</p> <p>WSP Section B1: Employment Summary</p> <p>WSP Section B2: Provincial Breakdown</p> <p>Impact Assessment</p> <p>Evaluation and Comments</p>																														
2	<p>The information on this form is populated based on what is captured on Organisation Information and the SDF linked.</p> <p>If there are any updates to be made, click on the Edit button</p>	<p>EDIT ATR SECTION 1: ANNUAL TRAINING REPORT</p> <p>OFO Occupation Abrasive Wheel Maker</p> <p>Municipality Abaqulusi</p> <table border="1"> <tr><td>African Male</td><td>1</td></tr> <tr><td>African Female</td><td>1</td></tr> <tr><td>African Disabled</td><td>1</td></tr> <tr><td>Coloured Male</td><td>1</td></tr> <tr><td>Coloured Female</td><td>1</td></tr> <tr><td>Coloured Disabled</td><td>1</td></tr> <tr><td>Indian Male</td><td>1</td></tr> <tr><td>Indian Female</td><td>1</td></tr> <tr><td>Indian Disabled</td><td>1</td></tr> <tr><td>White Male</td><td>1</td></tr> <tr><td>White Female</td><td>1</td></tr> <tr><td>White Disabled</td><td>0</td></tr> <tr><td>Age Below 35</td><td>4</td></tr> <tr><td>Age Between 35 And 55</td><td>2</td></tr> <tr><td>Age Above 55</td><td>2</td></tr> </table> <p>Save Cancel</p>	African Male	1	African Female	1	African Disabled	1	Coloured Male	1	Coloured Female	1	Coloured Disabled	1	Indian Male	1	Indian Female	1	Indian Disabled	1	White Male	1	White Female	1	White Disabled	0	Age Below 35	4	Age Between 35 And 55	2	Age Above 55	2
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Steps	Action	Screenshot																																																	
3	Once the information is captured and saved the user can be able to Edit or Remove by Clicking on the information	<p>ATR SECTION 1: ANNUAL TRAINING REPORT - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p> <table border="1"> <thead> <tr> <th>Occupation</th> <th>OFO Code</th> <th>Municipality</th> <th>Male: African</th> <th>Male: Coloured</th> <th>Male: Indian</th> <th>Male: White</th> <th>Female: African</th> <th>Female: Coloured</th> <th>Female: Indian</th> <th>Female: White</th> <th>Total: Male</th> <th>Total: Female</th> <th>Person With Disability: African</th> <th>Person With Disability: Coloured</th> </tr> </thead> <tbody> <tr> <td>Abrasive Wheel Maker</td> <td>712103</td> <td>Abaqulusi</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>4</td> <td>4</td> <td>1</td> <td>1</td> </tr> <tr> <td></td> <td></td> <td></td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>4</td> <td>4</td> <td>1</td> <td>1</td> </tr> </tbody> </table>	Occupation	OFO Code	Municipality	Male: African	Male: Coloured	Male: Indian	Male: White	Female: African	Female: Coloured	Female: Indian	Female: White	Total: Male	Total: Female	Person With Disability: African	Person With Disability: Coloured	Abrasive Wheel Maker	712103	Abaqulusi	1	1	1	1	1	1	1	1	4	4	1	1				1	1	1	1	1	1	1	1	4	4	1	1				
Occupation	OFO Code	Municipality	Male: African	Male: Coloured	Male: Indian	Male: White	Female: African	Female: Coloured	Female: Indian	Female: White	Total: Male	Total: Female	Person With Disability: African	Person With Disability: Coloured																																					
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4	Alternatively the SDF can capture information on excel by clicking Download Excel importer	<p>ATR SECTION 1: ANNUAL TRAINING REPORT - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>																																																	
5	Click on Download Excel Template	<p>IMPORT EXCEL DATA</p> <p>Download Excel Template</p> <p>Upload file to Import</p> <p>Browse...</p> <p>Import Cancel</p>																																																	
6	After downloading excel please capture information and save in excel. NOTE Don't change the name of the template when you save on your documents for capturing.	<p>AnnualTrainingReport_DL.xlsx [Protected View] - Microsoft Excel</p> <p>File Home Insert Page Layout Formulas Data Review View</p> <p>Protected View This file originated from an Internet location and might be unsafe. Click for more details. Enable Editing X</p> <table border="1"> <thead> <tr> <th></th> <th>A</th> <th>B</th> <th>C</th> <th>D</th> <th>E</th> <th></th> </tr> </thead> <tbody> <tr> <td>1</td> <td>OFOOccupationDescription</td> <td>MunicipalityID</td> <td>AfricanMale</td> <td>AfricanFemale</td> <td>AfricanDisabled</td> <td>Colour</td> </tr> <tr> <td>2</td> <td>OFO Occupation</td> <td>Municipality</td> <td>Male: African</td> <td>Female: African</td> <td>Person With Disability: African</td> <td>Male:</td> </tr> <tr> <td>3</td> <td>Leave Empty</td> <td>Leave Empty</td> <td>Leave Empty</td> <td>Leave Empty</td> <td>Leave Empty</td> <td>Leave</td> </tr> <tr> <td>4</td> <td>General Manager Public Service</td> <td>Ba-Phalaborwa</td> <td>0</td> <td>0</td> <td>0</td> <td></td> </tr> <tr> <td>5</td> <td>Senior Police Officer</td> <td>Polokwane</td> <td>5</td> <td>0</td> <td>1</td> <td></td> </tr> <tr> <td>6</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>		A	B	C	D	E		1	OFOOccupationDescription	MunicipalityID	AfricanMale	AfricanFemale	AfricanDisabled	Colour	2	OFO Occupation	Municipality	Male: African	Female: African	Person With Disability: African	Male:	3	Leave Empty	Leave Empty	Leave Empty	Leave Empty	Leave Empty	Leave	4	General Manager Public Service	Ba-Phalaborwa	0	0	0		5	Senior Police Officer	Polokwane	5	0	1		6						
	A	B	C	D	E																																														
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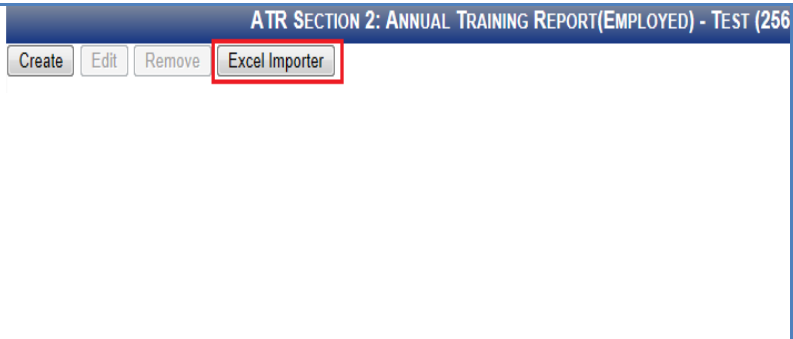
Steps	Action	Screenshot
7	Once the template is populated and all required information is capture Click on Browse to search for the saved template on your computer then click Import to upload.	

Section 2: Annual Training report Employed 2013/2014

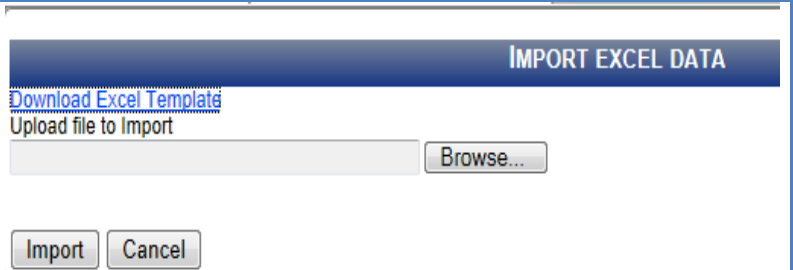
The section records the training that took place for 2013/2014

Steps	Action	Screenshot
1	Click on WSP Section 2 from the ATR Forms Menu	
2	The page allows user to capture details then save	

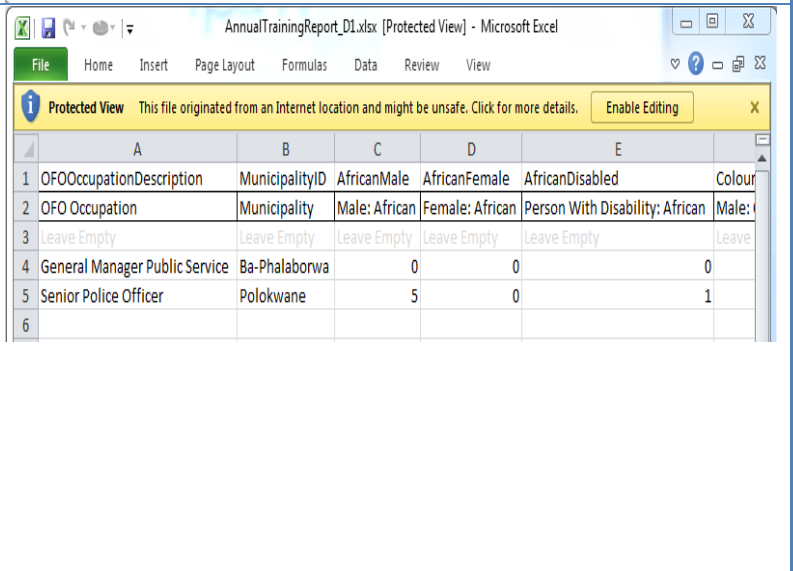
4 Alternatively the SDF can capture information on excel by clicking Download **Excel importer**



5 Click on **Download Excel Template**

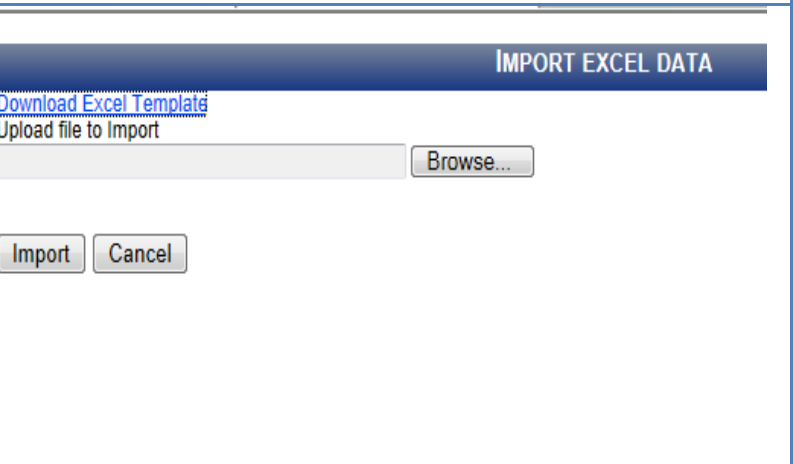


6 After downloading excel capture information and save in excel.
NOTE Don't change the name of the template when you save on your documents for capturing.




	A	B	C	D	E	
1	OFOOccupationDescription	MunicipalityID	AfricanMale	AfricanFemale	AfricanDisabled	Colour
2	OFO Occupation	Municipality	Male: African	Female: African	Person With Disability: African	Male: x
3	Leave Empty	Leave Empty	Leave Empty	Leave Empty	Leave Empty	Leave
4	General Manager Public Service	Ba-Phalaborwa	0	0	0	
5	Senior Police Officer	Polokwane	5	0	1	
6						

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 click **Import** to



upload.

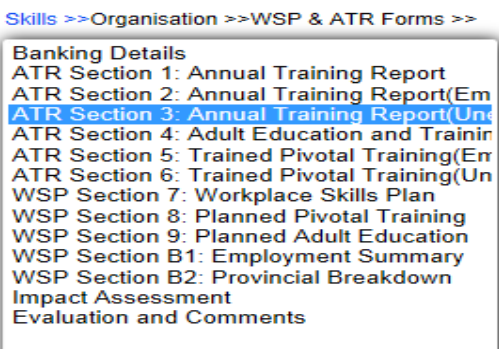

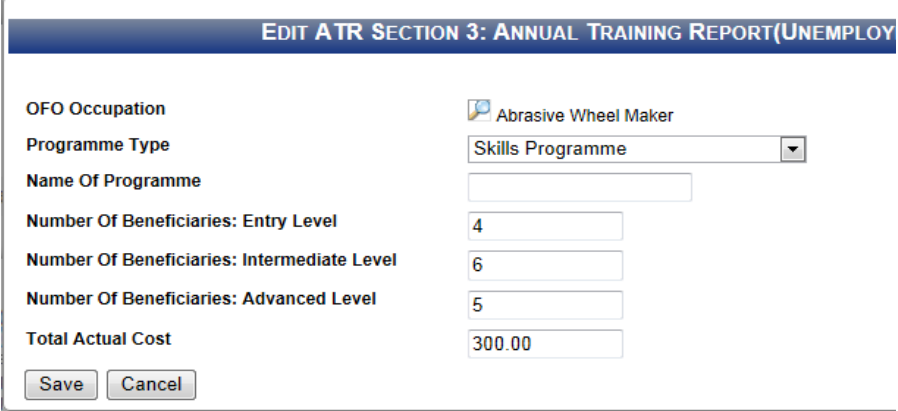
8 Once the information is captured and saved the user can be able to edit.




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	Total Actual Cost
Abrasive Wheel Maker	712103	Bursaries		4	4	4	200.0
				0	4	4	4

Section 3: Annual Training Report Unemployed

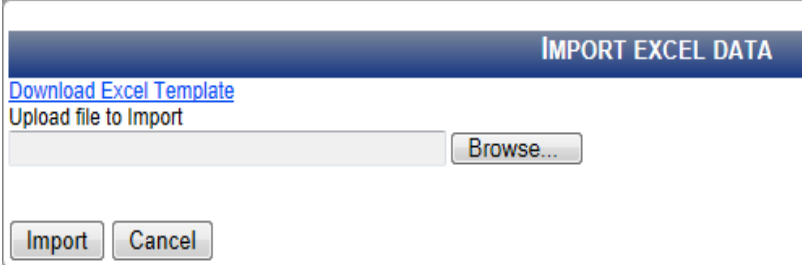
The section records the planned training that is going to take place

Steps	Action	Screenshot
1	Click on WSP Section 3 from the ATR Forms Menu	
2	Click on the Create button	
3	Capture the details and save	

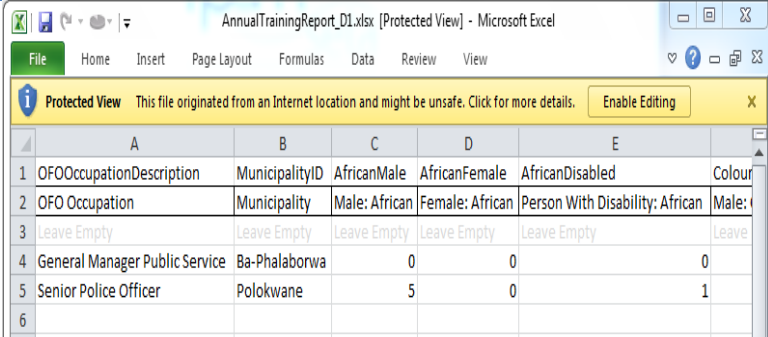
4 Once the record is saved, one has the option to **Edit or Remove it.**



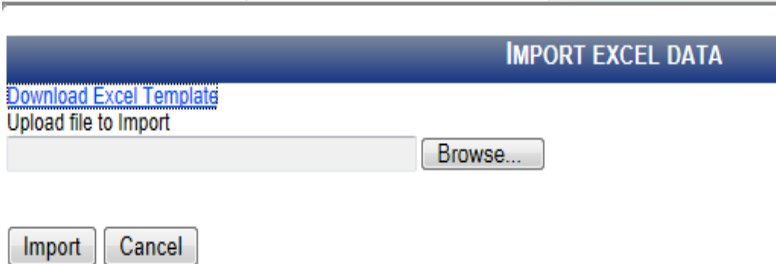
5 Alternatively, you may use the Excel Importer template. Click on the Excel Importer button



6 After downloading excel capture information and save in excel.
NOTE Don't change the name of the template when you save on your documents for capturing.



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 click **Import** to



upload.

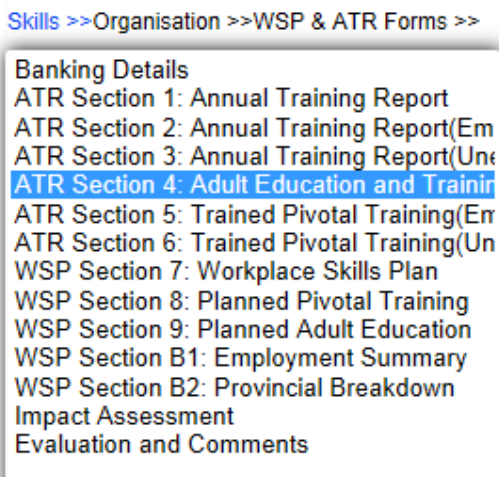

Once the information is captured and saved the user can be able to edit by clicking on it then the Edit of Remove button will be active

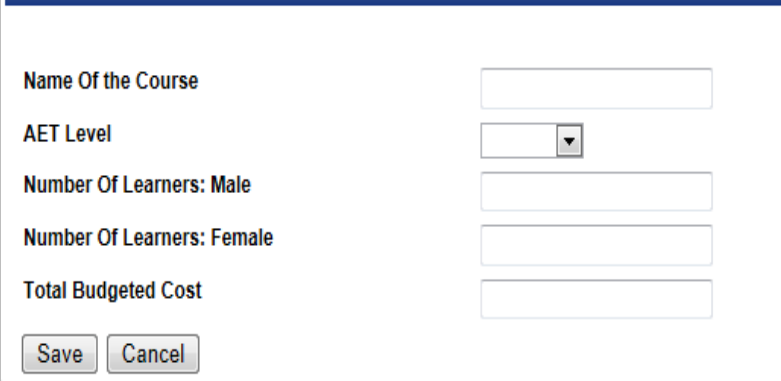
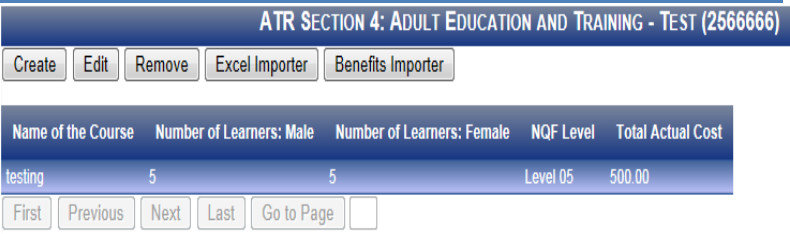
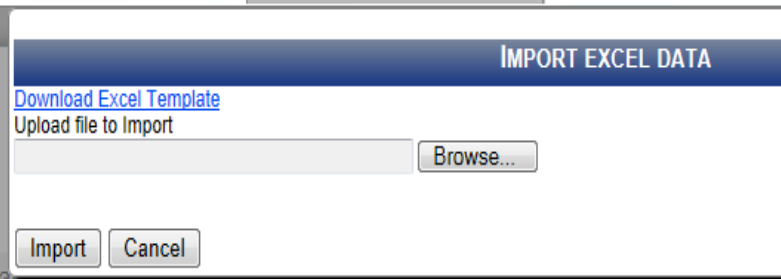
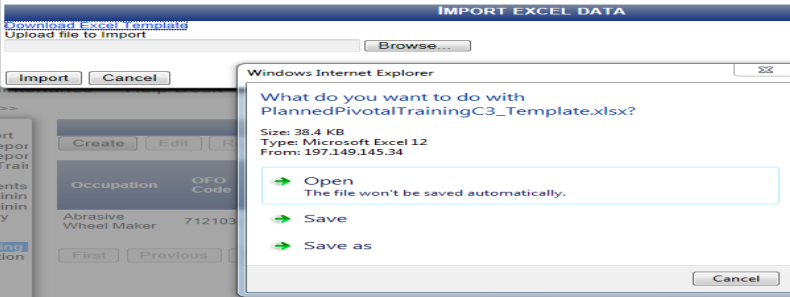
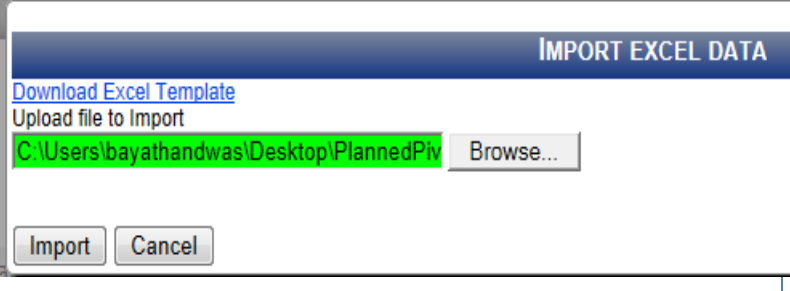
ATR SECTION 3: ANNUAL TRAINING REPORT(UNEMPLOYED) - TEST (2566666)						
Create Edit Remove Excel Importer						
Occupation	OFO Code	Type of Learning Programmes	Name Of Programme	Number Of Beneficiaries: Entry Level	Number Of Beneficiaries: Intermediate Level	Number Of Beneficiaries: Advanced Level
Abrasive Wheel Maker	712103	Skills Programme		4	6	5
			0	4	6	5

[First](#) [Previous](#) [Next](#) [Last](#) [Go to Page](#)

Section 4: Adult Education and Training

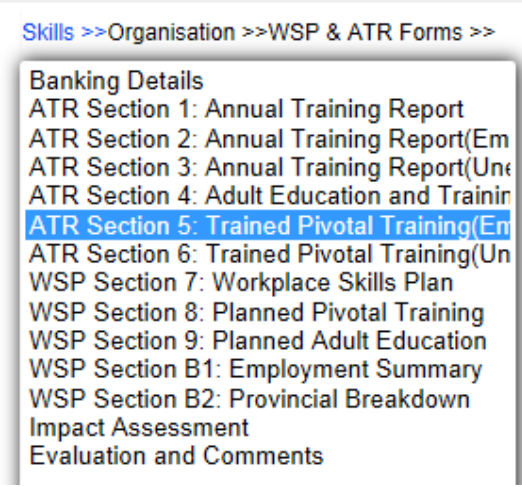
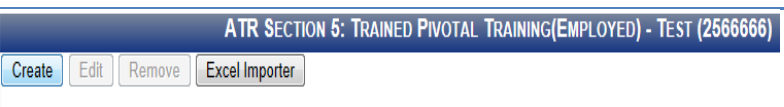
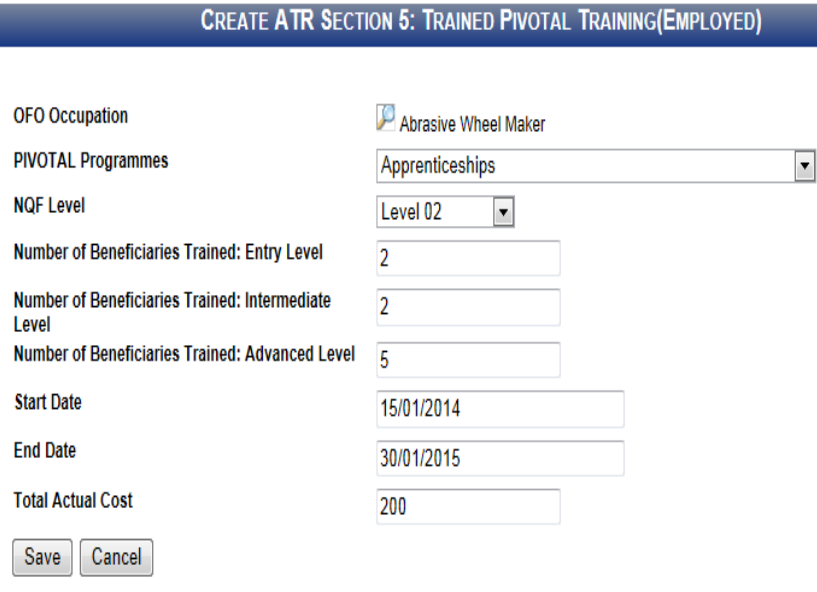
The section records the planned training that is going to take place

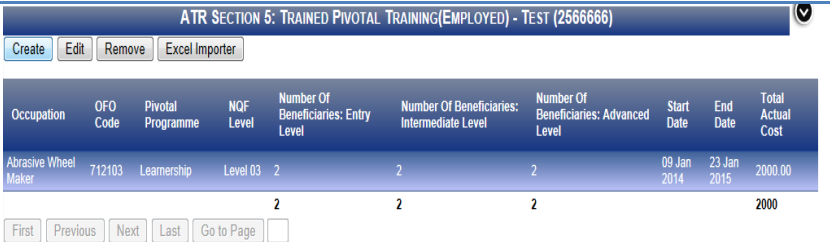
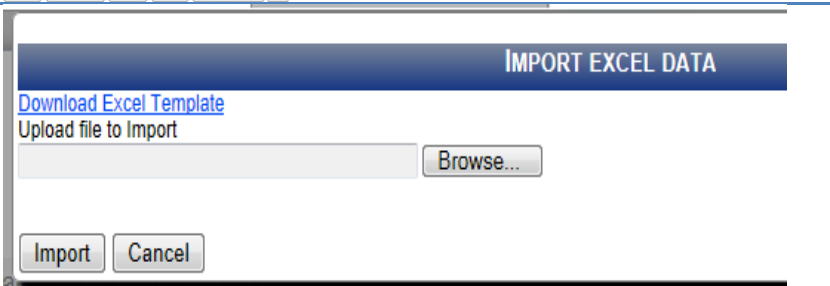
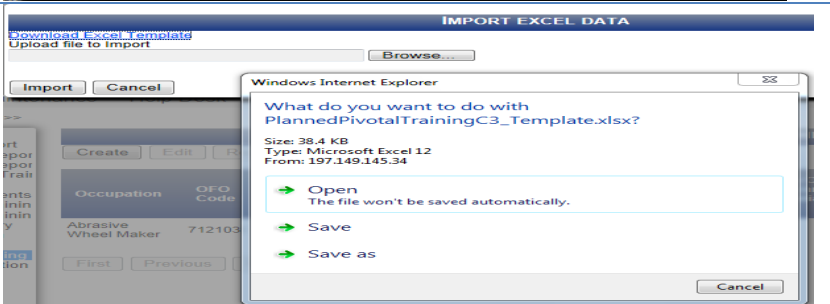
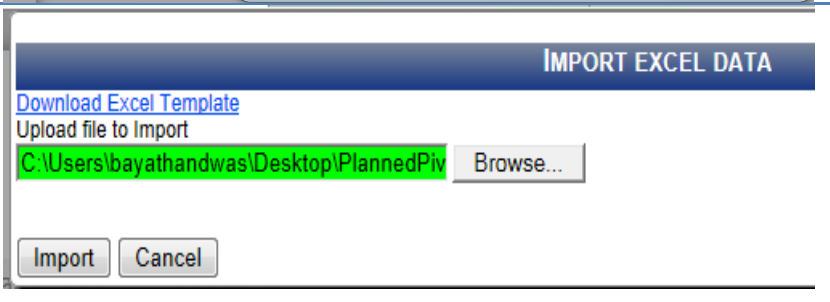
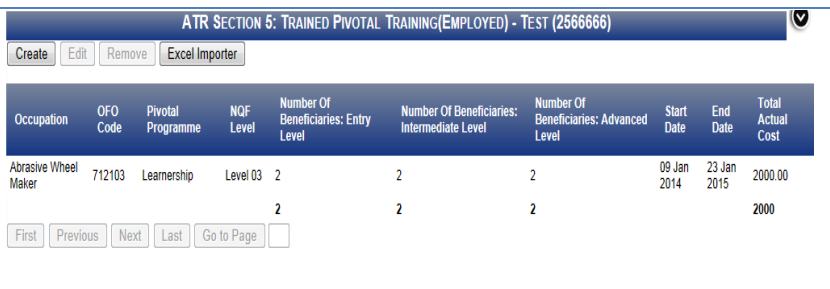
Steps	Action	Screenshot
1	Click on WSP Section 4 from the ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Un ATR Section 4: Adult Education and Traini ATR Section 5: Trained Pivotal Training(Err 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	 <p>ATR SECTION 4: ADULT EDUCATION AND TRAINING</p> <p> Create Edit Remove Excel Importer Benefits Importer </p>

Steps	Action	Screenshot
3	Capture the details and save	
4	Once the record is saved, one has the option to Edit or Remove it .	
5	Alternatively you can download Excel Template then browse	
6	The screen on the right will appear. Click on Download Excel Template and save the template on your computer.	
7	Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.	

Section 5: Trained Pivotal Training

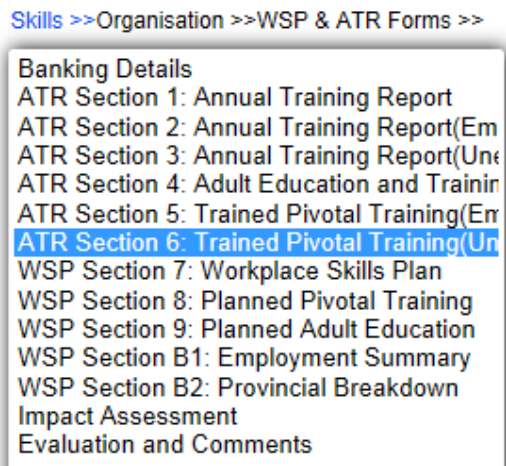
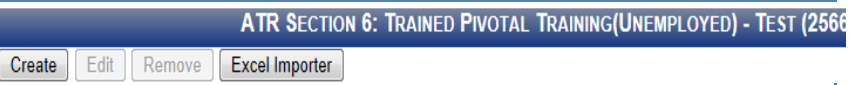
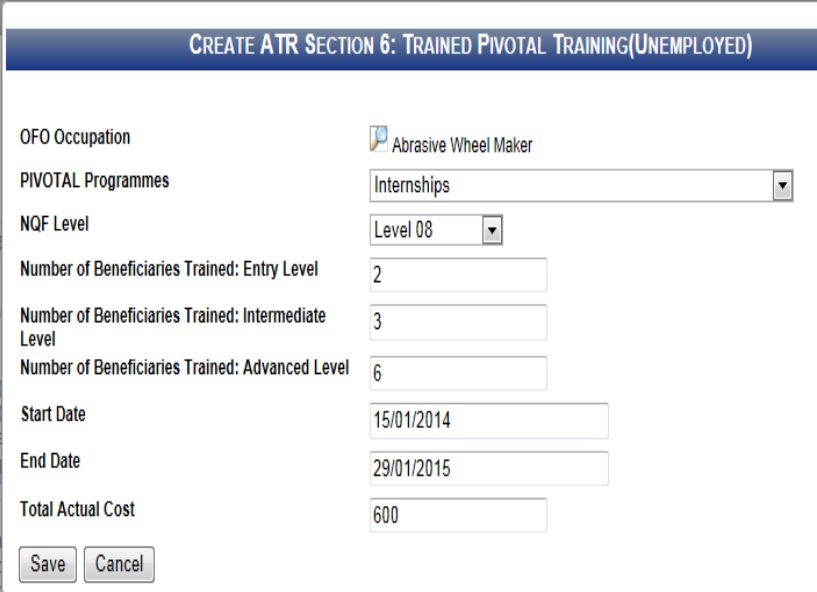

The section records the planned Pivotal Training that is going to take place for 2014/2015.

Steps	Action	Screenshot
1	Click on WSP Section 5 from the ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> 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(EMPLOYED) 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	 <p>ATR SECTION 5: TRAINED PIVOTAL TRAINING(EMPLOYED) - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>
3	Capture details and save	 <p>CREATE ATR SECTION 5: TRAINED PIVOTAL TRAINING(EMPLOYED)</p> <p>OFO Occupation: Abrasive Wheel Maker</p> <p>PIVOTAL Programmes: Apprenticeships</p> <p>NQF Level: Level 02</p> <p>Number of Beneficiaries Trained: Entry Level: 2</p> <p>Number of Beneficiaries Trained: Intermediate Level: 2</p> <p>Number of Beneficiaries Trained: Advanced Level: 5</p> <p>Start Date: 15/01/2014</p> <p>End Date: 30/01/2015</p> <p>Total Actual Cost: 200</p> <p>Save Cancel</p>

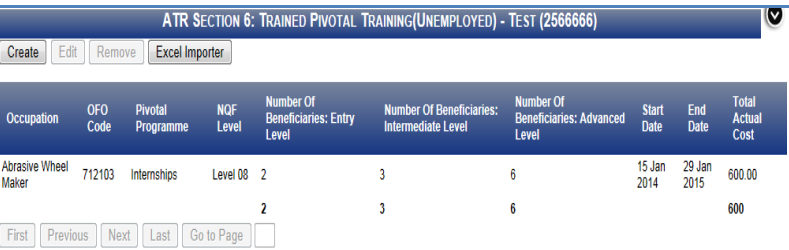
<p>4 Once the record is saved, one has the option to Edit or Remove it.</p>	
<p>5 Alternatively you can download Excel Template then browse</p>	
<p>6 The screen on the right will appear. Click on Download Excel Template and save the template on your computer.</p>	
<p>7 Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.</p>	
<p>4 Once the record is saved, one has the option to Edit or Remove it.</p>	

Section 6: Trained Pivotal Training

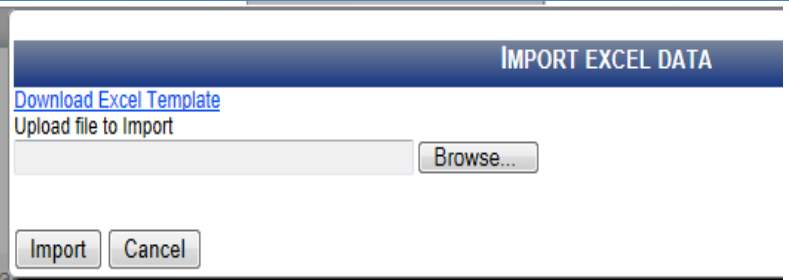
The section records the planned Pivotal Training that is going to take place for 2014/2015.

Steps	Action	Screenshot
1	Click on WSP Section 6 from the WSP & ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> 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(Err 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	 <p>ATR SECTION 6: TRAINED PIVOTAL TRAINING(UNEMPLOYED) - TEST (2566)</p> <p>Create Edit Remove Excel Importer</p>
3	Capture details and save	 <p>CREATE ATR SECTION 6: TRAINED PIVOTAL TRAINING(UNEMPLOYED)</p> <p>OFO Occupation  Abrasive Wheel Maker</p> <p>PIVOTAL Programmes Internships</p> <p>NQF Level Level 08</p> <p>Number of Beneficiaries Trained: Entry Level 2</p> <p>Number of Beneficiaries Trained: Intermediate Level 3</p> <p>Number of Beneficiaries Trained: Advanced Level 6</p> <p>Start Date 15/01/2014</p> <p>End Date 29/01/2015</p> <p>Total Actual Cost 600</p> <p>Save Cancel</p>

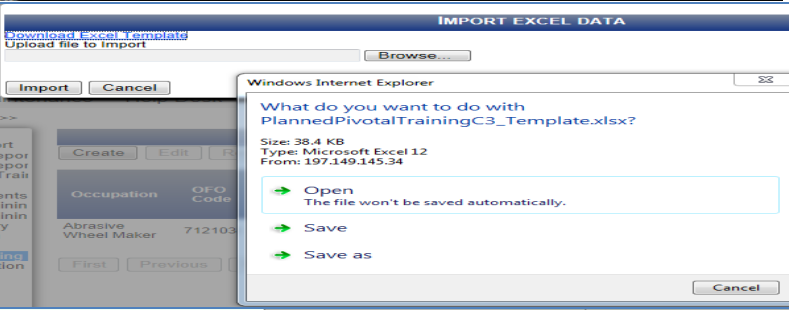
4 Once the record is saved, one has the option to **Edit** or **Remove** it.



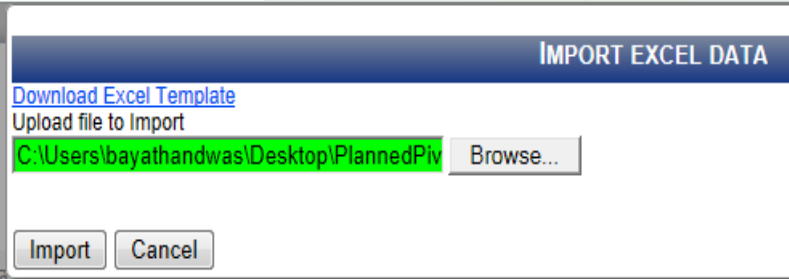
5 Alternatively you can download Excel Template then browse



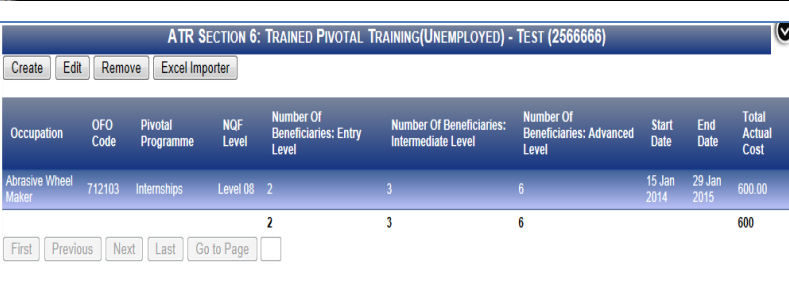
6 The screen on the right will appear. Click on Download Excel Template and save the template on your computer.



7 Once the template is populated. Click on **Browse** to search for the saved template on your computer then click **Import** to upload.

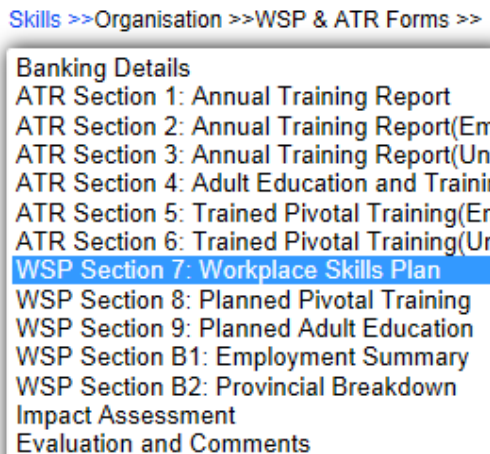

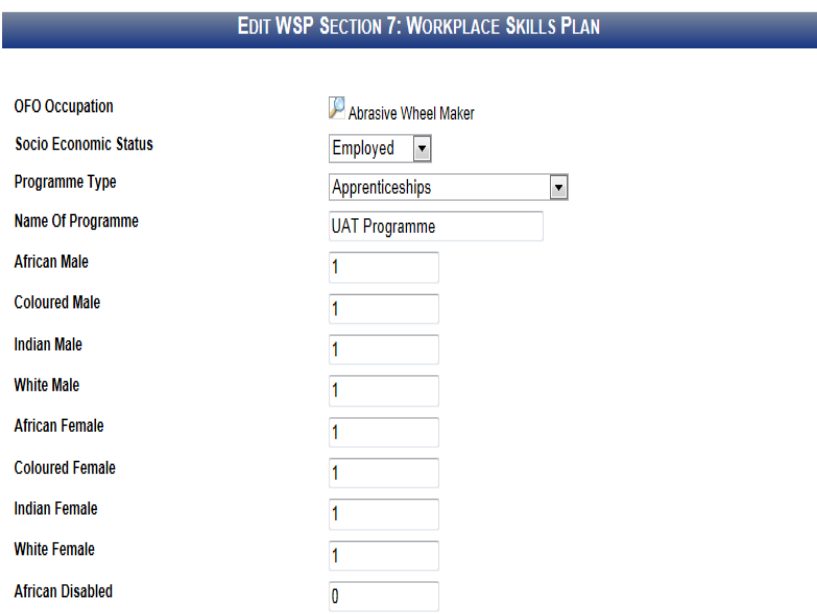
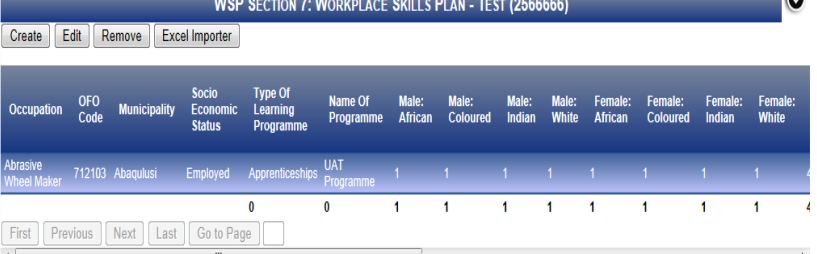


4 Once the record is saved, one has the option to **Edit** or **Remove** it.



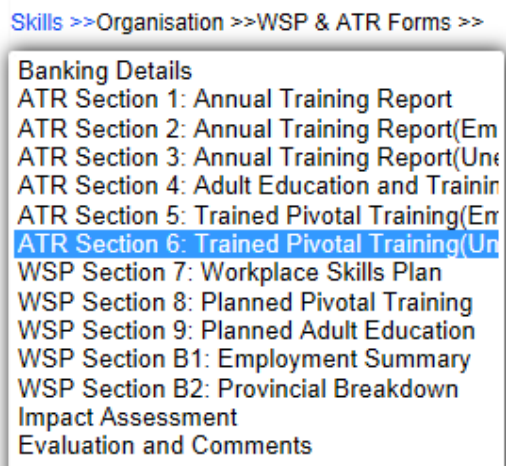

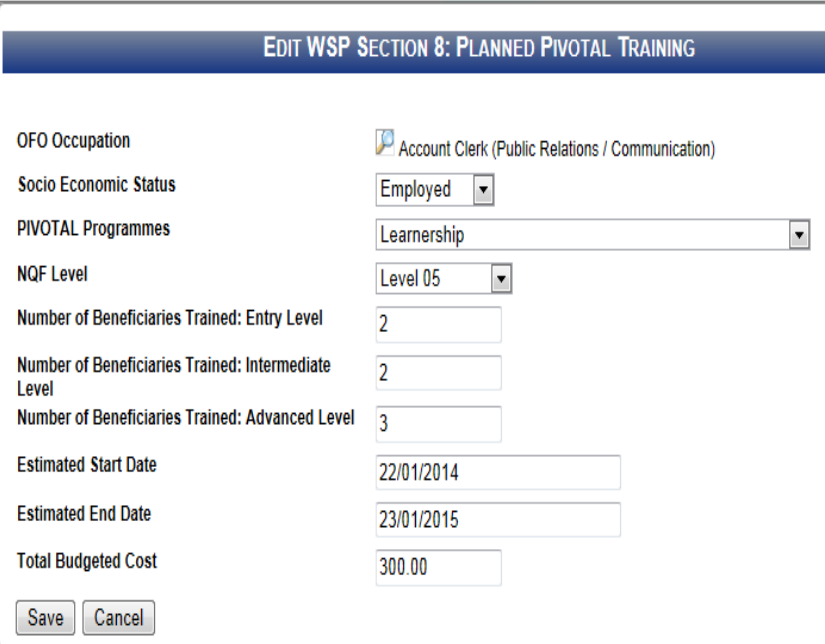
Section 7 Workplace Skills plan

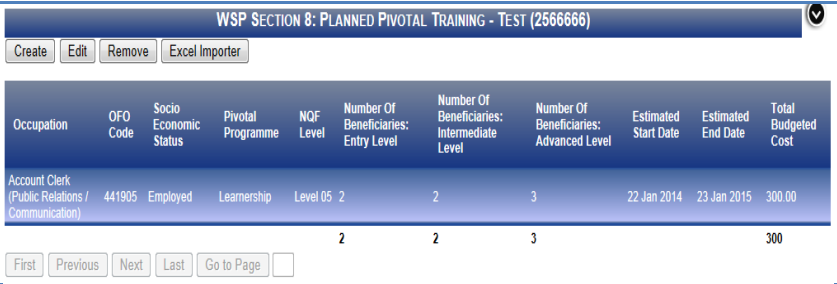
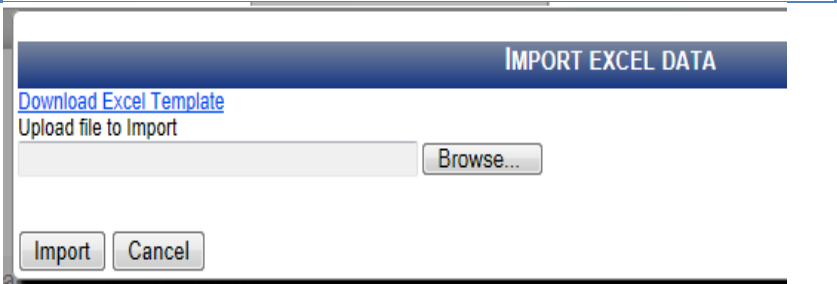
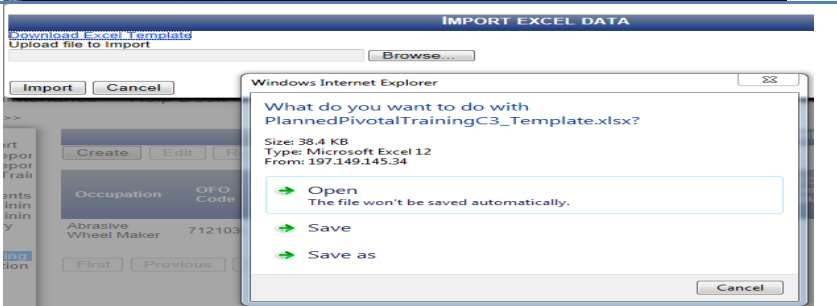
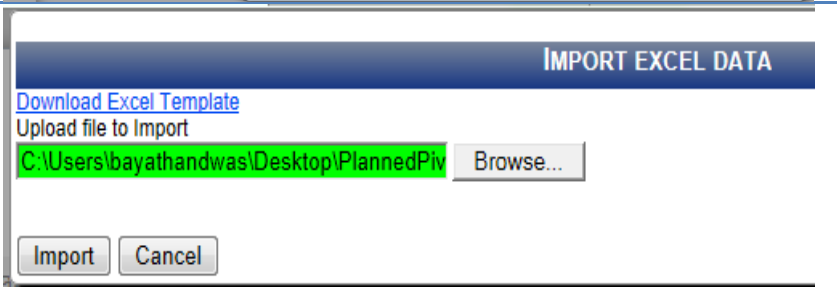
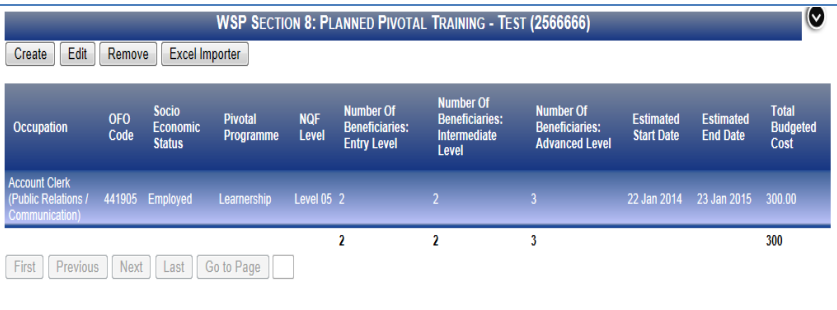
This section record Workplace Skills Plane

Steps	Action	Screenshot																												
1	Click on WSP Section 7	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <p>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 Trainir 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 B1: Employment Summary WSP Section B2: Provincial Breakdown Impact Assessment Evaluation and Comments</p>																												
2	Click on the Create button	 <p>WSP SECTION 7: WORKPLACE SKILLS PLAN - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>																												
3	Search for the OFO Code and the fill in all required information and save	 <p>EDIT WSP SECTION 7: WORKPLACE SKILLS PLAN</p> <p>OFO Occupation <input type="text" value="Abrasive Wheel Maker"/></p> <p>Socio Economic Status <input type="text" value="Employed"/></p> <p>Programme Type <input type="text" value="Apprenticeships"/></p> <p>Name Of Programme <input type="text" value="UAT Programme"/></p> <p>African Male <input type="text" value="1"/></p> <p>Coloured Male <input type="text" value="1"/></p> <p>Indian Male <input type="text" value="1"/></p> <p>White Male <input type="text" value="1"/></p> <p>African Female <input type="text" value="1"/></p> <p>Coloured Female <input type="text" value="1"/></p> <p>Indian Female <input type="text" value="1"/></p> <p>White Female <input type="text" value="1"/></p> <p>African Disabled <input type="text" value="0"/></p>																												
4	Once the record is saved, one has the option to Edit or Remove it.	 <p>WSP SECTION 7: WORKPLACE SKILLS PLAN - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p> <table border="1"> <thead> <tr> <th>Occupation</th> <th>OFO Code</th> <th>Municipality</th> <th>Socio Economic Status</th> <th>Type Of Learning Programme</th> <th>Name Of Programme</th> <th>Male: African</th> <th>Male: Coloured</th> <th>Male: Indian</th> <th>Male: White</th> <th>Female: African</th> <th>Female: Coloured</th> <th>Female: Indian</th> <th>Female: White</th> </tr> </thead> <tbody> <tr> <td>Abrasive Wheel Maker</td> <td>712103</td> <td>Abaqulusi</td> <td>Employed</td> <td>Apprenticeships</td> <td>UAT Programme</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> <td>1</td> </tr> </tbody> </table> <p>0 0 1 1 1 1 1 1 1 1 1 1 1 4</p> <p>First Previous Next Last Go to Page</p>	Occupation	OFO Code	Municipality	Socio Economic Status	Type Of Learning Programme	Name Of Programme	Male: African	Male: Coloured	Male: Indian	Male: White	Female: African	Female: Coloured	Female: Indian	Female: White	Abrasive Wheel Maker	712103	Abaqulusi	Employed	Apprenticeships	UAT Programme	1	1	1	1	1	1	1	1
Occupation	OFO Code	Municipality	Socio Economic Status	Type Of Learning Programme	Name Of Programme	Male: African	Male: Coloured	Male: Indian	Male: White	Female: African	Female: Coloured	Female: Indian	Female: White																	
Abrasive Wheel Maker	712103	Abaqulusi	Employed	Apprenticeships	UAT Programme	1	1	1	1	1	1	1	1																	

Section 8: Planned Pivotal Training

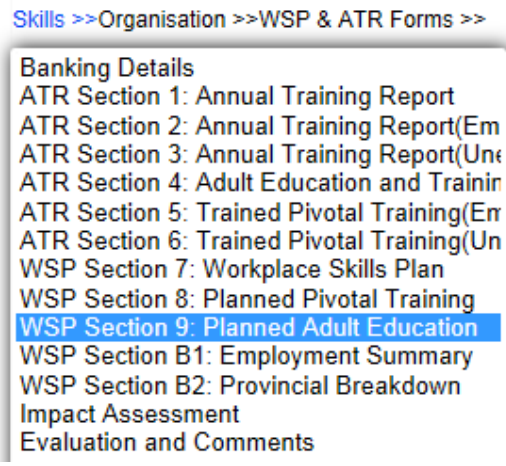

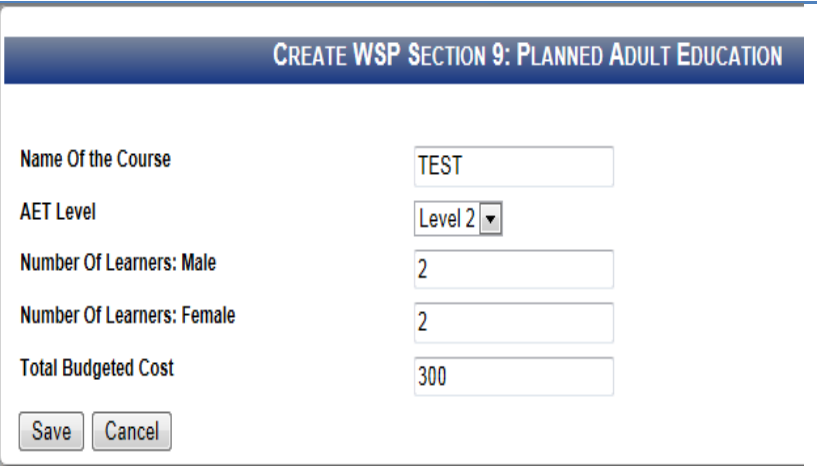
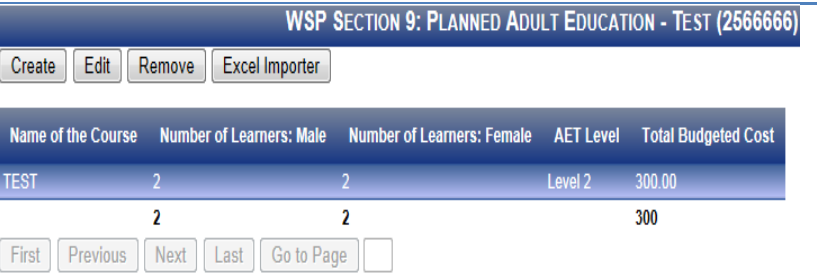
The section records the planned Pivotal Training that is going to take place for 2014/2015.

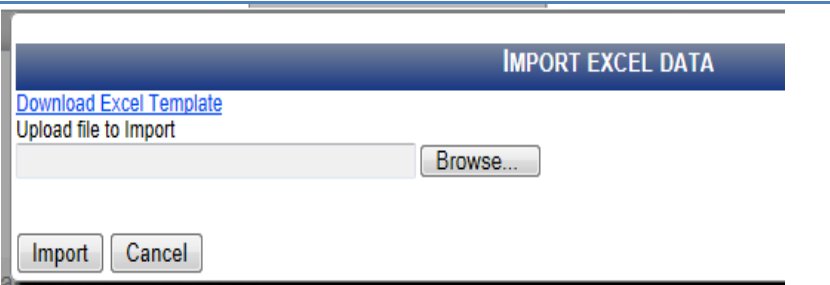
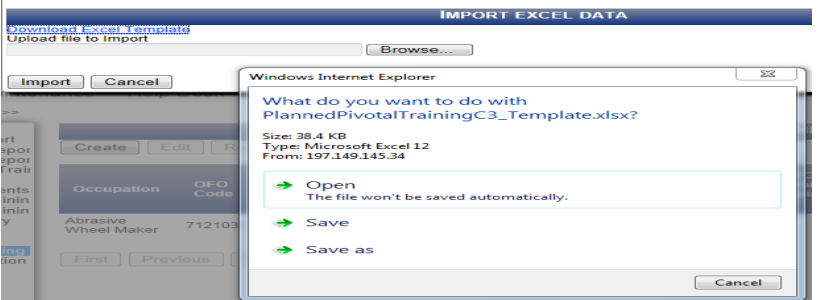
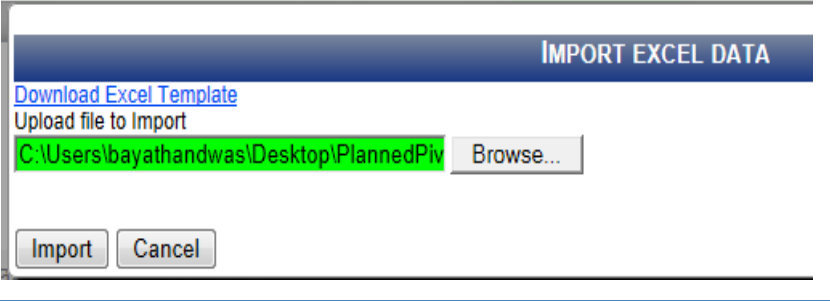
Steps	Action	Screenshot
1	Click on WSP Section 8 from the WSP & ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report(Em ATR Section 3: Annual Training Report(Un ATR Section 4: Adult Education and Trainin ATR Section 5: Trained Pivotal Training(Err 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	 <p>WSP SECTION 8: PLANNED PIVOTAL TRAINING - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>
3	Capture details and save	 <p>EDIT WSP SECTION 8: PLANNED PIVOTAL TRAINING</p> <p>OFO Occupation <input type="text" value="Account Clerk (Public Relations / Communication)"/></p> <p>Socio Economic Status <input type="text" value="Employed"/></p> <p>PIVOTAL Programmes <input type="text" value="Learnership"/></p> <p>NQF Level <input type="text" value="Level 05"/></p> <p>Number of Beneficiaries Trained: Entry Level <input type="text" value="2"/></p> <p>Number of Beneficiaries Trained: Intermediate Level <input type="text" value="2"/></p> <p>Number of Beneficiaries Trained: Advanced Level <input type="text" value="3"/></p> <p>Estimated Start Date <input type="text" value="22/01/2014"/></p> <p>Estimated End Date <input type="text" value="23/01/2015"/></p> <p>Total Budgeted Cost <input type="text" value="300.00"/></p> <p>Save Cancel</p>

<p>4 Once the record is saved, one has the option to Edit or Remove it.</p>	
<p>5 Alternatively you can download Excel Template then browse</p>	
<p>6 The screen on the right will appear. Click on Download Excel Template and save the template on your computer.</p>	
<p>7 Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.</p>	
<p>4 Once the record is saved, one has the option to Edit or Remove it.</p>	

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 WSP Section 9 from the WSP & ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> 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(Err 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	 <p>WSP SECTION 9: PLANNED ADULT EDUCATION - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>										
3	Capture details and save	 <p>CREATE WSP SECTION 9: PLANNED ADULT EDUCATION</p> <p>Name Of the Course: TEST</p> <p>AET Level: Level 2</p> <p>Number Of Learners: Male: 2</p> <p>Number Of Learners: Female: 2</p> <p>Total Budgeted Cost: 300</p> <p>Save Cancel</p>										
4	Once the record is saved, one has the option to Edit or Remove it .	 <p>WSP SECTION 9: PLANNED ADULT EDUCATION - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p> <table border="1"> <thead> <tr> <th>Name of the Course</th> <th>Number of Learners: Male</th> <th>Number of Learners: Female</th> <th>AET Level</th> <th>Total Budgeted Cost</th> </tr> </thead> <tbody> <tr> <td>TEST</td> <td>2</td> <td>2</td> <td>Level 2</td> <td>300.00</td> </tr> </tbody> </table> <p>2 2 300</p> <p>First Previous Next Last Go to Page</p>	Name of the Course	Number of Learners: Male	Number of Learners: Female	AET Level	Total Budgeted Cost	TEST	2	2	Level 2	300.00
Name of the Course	Number of Learners: Male	Number of Learners: Female	AET Level	Total Budgeted Cost								
TEST	2	2	Level 2	300.00								

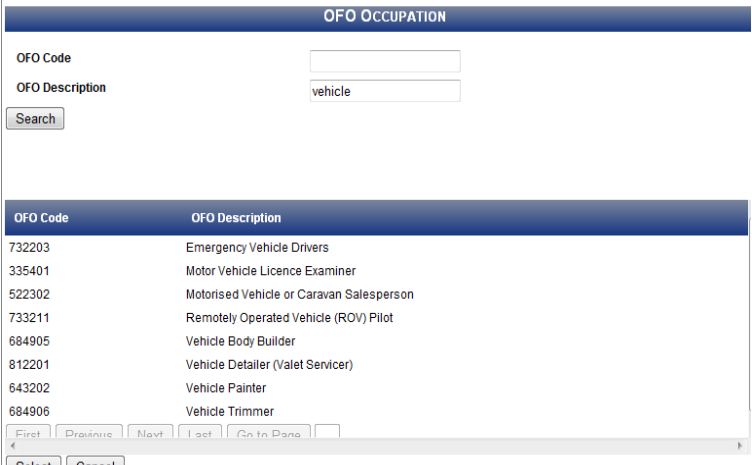
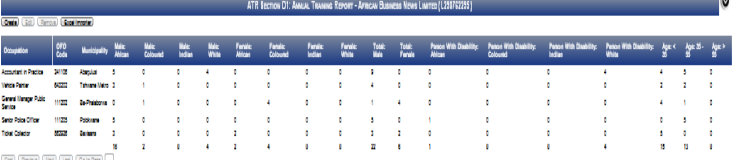
<p>5 Alternatively you can download Excel Template then browse</p>											
<p>6 The screen on the right will appear. Click on Download Excel Template and save the template on your computer.</p>											
<p>7 Once the template is populated. Click on Browse to search for the saved template on your computer then click Import to upload.</p>											
<p>8 Once the record is saved, one has the option to Edit or Remove it.</p>	<p style="text-align: center;">WSP SECTION 9: PLANNED ADULT EDUCATION - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p> <table border="1" data-bbox="607 1247 1386 1335"> <thead> <tr> <th>Name of the Course</th> <th>Number of Learners: Male</th> <th>Number of Learners: Female</th> <th>AET Level</th> <th>Total Budgeted Cost</th> </tr> </thead> <tbody> <tr> <td>TEST</td> <td>2</td> <td>2</td> <td>Level 2</td> <td>300.00</td> </tr> </tbody> </table> <p style="text-align: center;">2 2 300</p> <p>First Previous Next Last Go to Page <input type="text"/></p>	Name of the Course	Number of Learners: Male	Number of Learners: Female	AET Level	Total Budgeted Cost	TEST	2	2	Level 2	300.00
Name of the Course	Number of Learners: Male	Number of Learners: Female	AET Level	Total Budgeted Cost							
TEST	2	2	Level 2	300.00							

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

Capturing principles on the forms

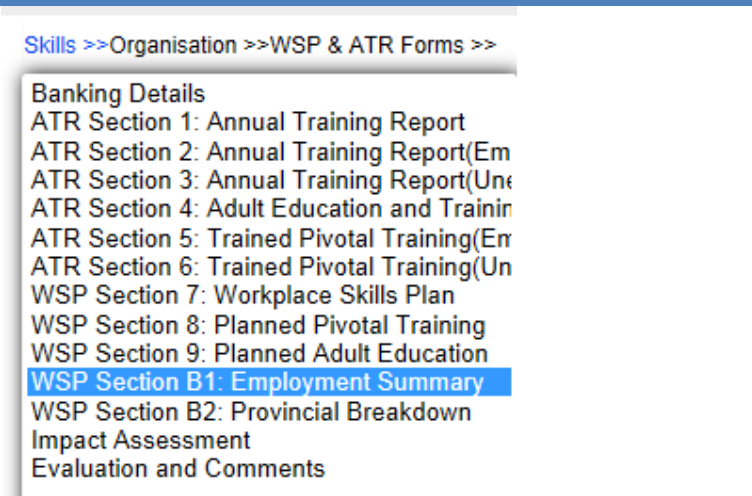

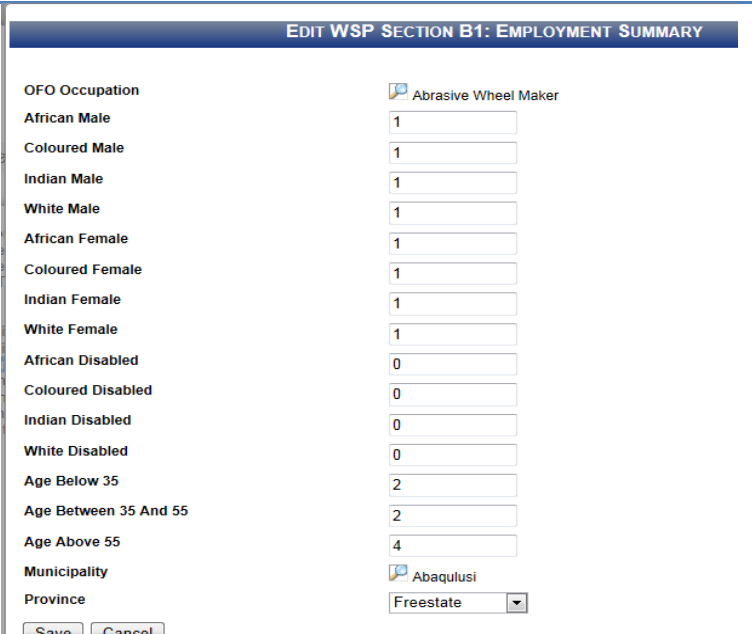
The section below outlines capturing principles on the forms

Steps	Action	Screenshot
1	OFO codes are the 1st step in the capture process The	
2	Capturing type of Programmes, numbers of employees, disability status,	

Steps	Action	Screenshot
	gender and age groups etc.	

WSP Section B1: Employment Summary

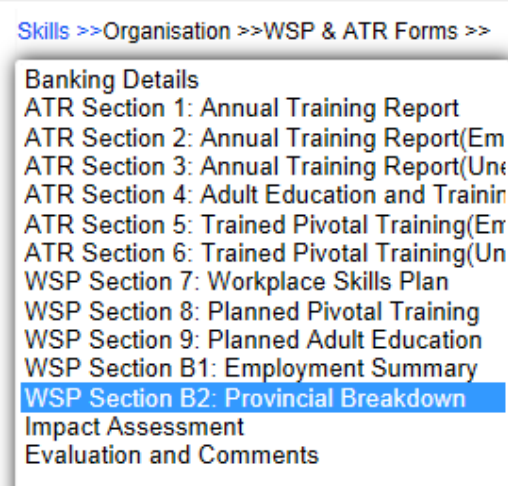

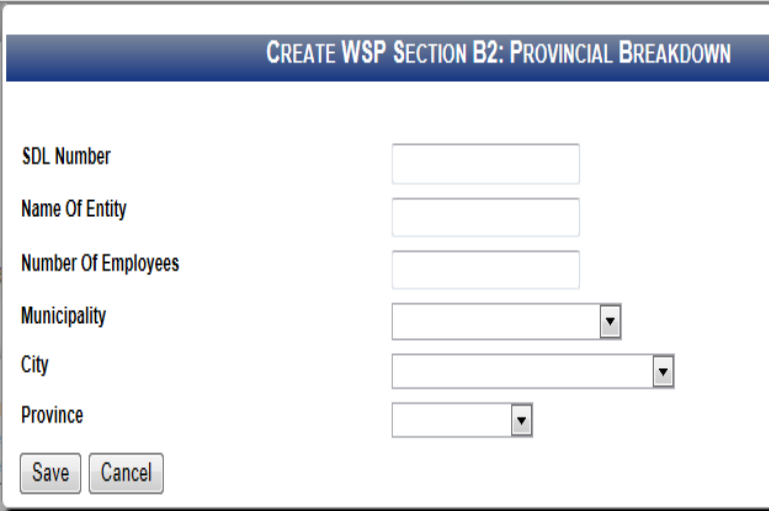

The section below outlines the process for capturing the Employment Summary.

Steps	Action	Screenshot
1	Click on WSP Section B from the WSP & ATR Forms Menu	
2	Click on the Create button	
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 .	

Steps	Action	Screenshot
4	Once the record is saved, one has the option to Edit or Remove it .	
5	Alternatively, you may use the Excel Importer template. Click on the Excel Importer button .	
6	The screen on the right will appear. Click on Download Excel Template and save the template on your computer.	
7	Once the template is populated. Click on Choose file to search for the saved template on your computer then click Import to upload.	

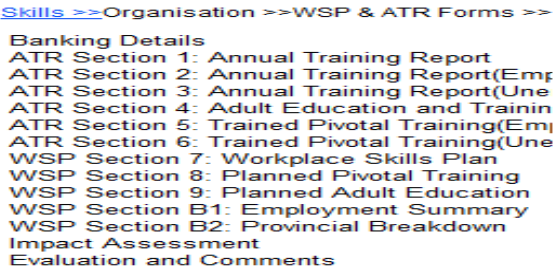
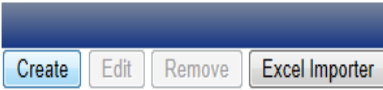
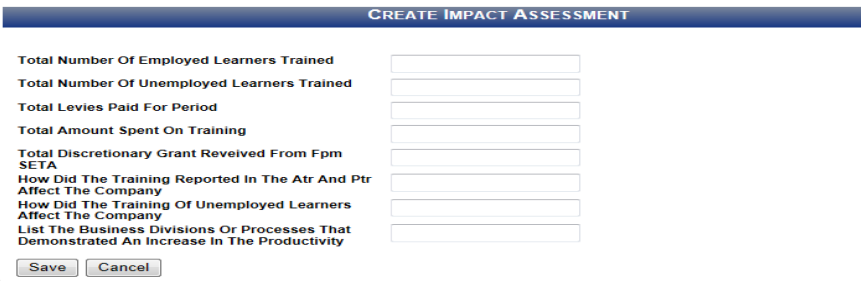
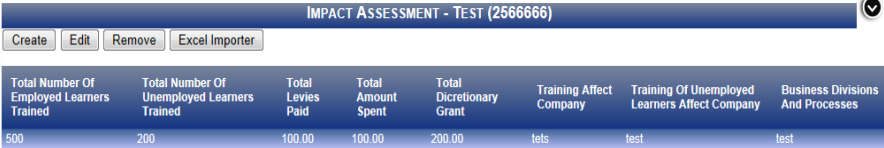
B2: Provincial Breakdown

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

Step	Action	Screenshot						
1	Click on WSP Section B2 Provincial Breakdown	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> 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(Err 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	 <p>WSP SECTION B2: PROVINCIAL BREAKDOWN - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>						
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 .	 <p>CREATE WSP SECTION B2: PROVINCIAL BREAKDOWN</p> <p>SDL Number <input type="text"/></p> <p>Name Of Entity <input type="text"/></p> <p>Number Of Employees <input type="text"/></p> <p>Municipality <input type="text" value="v"/></p> <p>City <input type="text" value="v"/></p> <p>Province <input type="text" value="v"/></p> <p>Save Cancel</p>						
4	Once the record is saved, one has the option to Edit or Remove by clicking on it.	 <p>WSP SECTION B2: PROVINCIAL BREAKDOWN - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p> <table border="1"> <thead> <tr> <th>SDL Number</th> <th>Name Of Entity</th> <th>Number Of Employees</th> </tr> </thead> <tbody> <tr> <td>L45556</td> <td>200</td> <td>100</td> </tr> </tbody> </table> <p>First Previous Next Last Go to Page <input type="text"/></p>	SDL Number	Name Of Entity	Number Of Employees	L45556	200	100
SDL Number	Name Of Entity	Number Of Employees						
L45556	200	100						

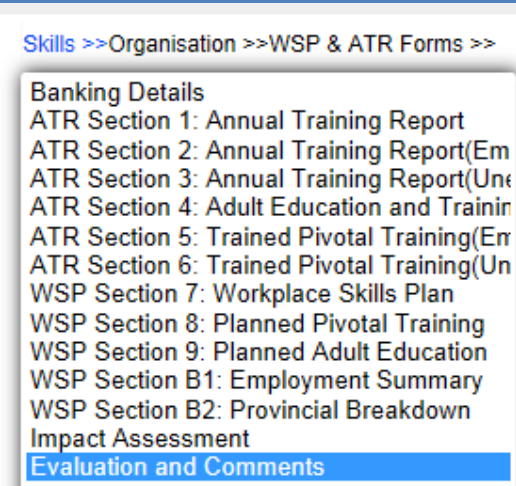
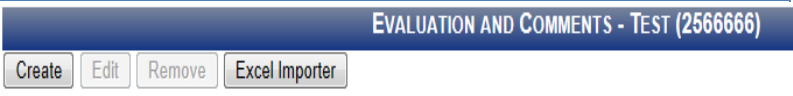
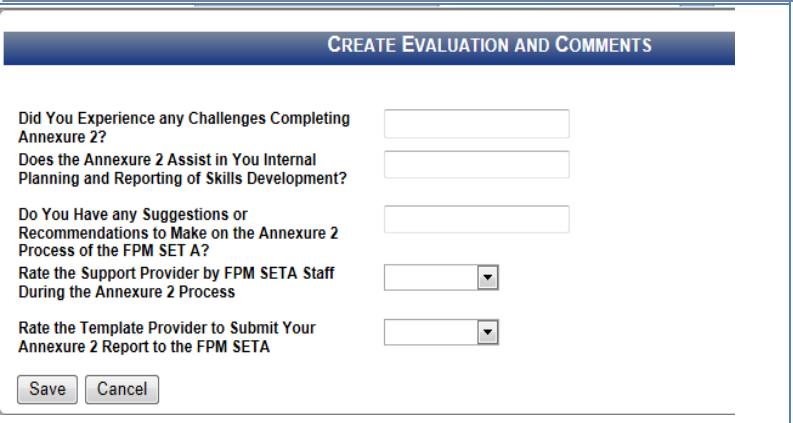
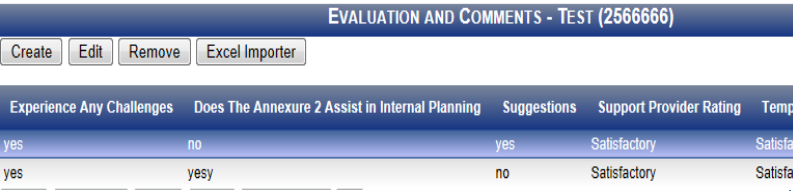
Impact Assessment

This section records the impact assessment

Step	Action	Screenshot																
1	Click on WSP Section C1 from the WSP & ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> Banking Details ATR Section 1: Annual Training Report ATR Section 2: Annual Training Report (Emp) 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 (Une) 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	 <p>IMPACT ASSESSMENT - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p>																
3	Capture all required information and save.	 <p>CREATE IMPACT ASSESSMENT</p> <p>Total Number Of Employed Learners Trained <input type="text"/></p> <p>Total Number Of Unemployed Learners Trained <input type="text"/></p> <p>Total Levies Paid For Period <input type="text"/></p> <p>Total Amount Spent On Training <input type="text"/></p> <p>Total Discretionary Grant Reveived From Fpm SETA <input type="text"/></p> <p>How Did The Training Reported In The Atr And Ptr Affect The Company <input type="text"/></p> <p>How Did The Training Of Unemployed Learners Affect The Company <input type="text"/></p> <p>List The Business Divisions Or Processes That Demonstrated An Increase In The Productivity <input type="text"/></p> <p>Save Cancel</p>																
4	Once the record is saved, one has the option to Edit or Remove it but clicking on it.	 <p>IMPACT ASSESSMENT - TEST (2566666)</p> <p>Create Edit Remove Excel Importer</p> <table border="1"> <thead> <tr> <th>Total Number Of Employed Learners Trained</th> <th>Total Number Of Unemployed Learners Trained</th> <th>Total Levies Paid</th> <th>Total Amount Spent</th> <th>Total Discretionary Grant</th> <th>Training Affect Company</th> <th>Training Of Unemployed Learners Affect Company</th> <th>Business Divisions And Processes</th> </tr> </thead> <tbody> <tr> <td>500</td> <td>200</td> <td>100.00</td> <td>100.00</td> <td>200.00</td> <td>tels</td> <td>test</td> <td>test</td> </tr> </tbody> </table>	Total Number Of Employed Learners Trained	Total Number Of Unemployed Learners Trained	Total Levies Paid	Total Amount Spent	Total Discretionary Grant	Training Affect Company	Training Of Unemployed Learners Affect Company	Business Divisions And Processes	500	200	100.00	100.00	200.00	tels	test	test
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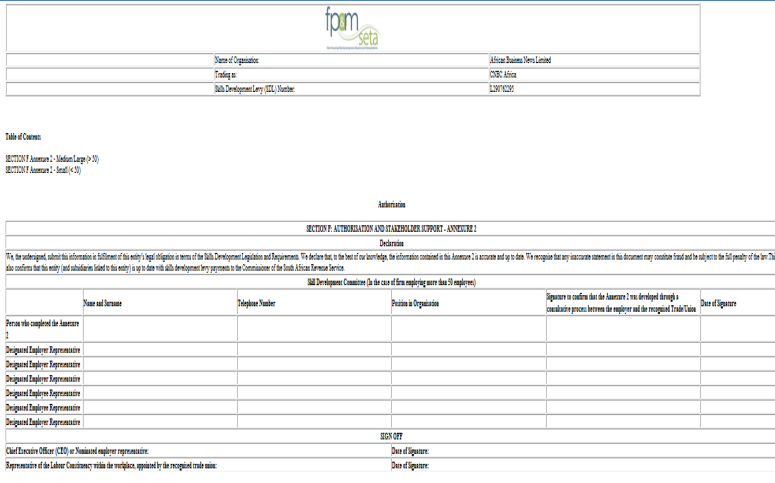
Evaluation and Comments

This section records Evaluation and Comments

Step	Action	Screenshot															
1	Click on WSP Evaluation and Comments from the WSP & ATR Forms Menu	 <p>Skills >> Organisation >> WSP & ATR Forms >></p> <ul style="list-style-type: none"> 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(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																
3	Answer all question and Save	 <p>CREATE EVALUATION AND COMMENTS</p> <p>Did You Experience any Challenges Completing Annexure 2? <input type="text"/></p> <p>Does the Annexure 2 Assist in You Internal Planning and Reporting of Skills Development? <input type="text"/></p> <p>Do You Have any Suggestions or Recommendations to Make on the Annexure 2 Process of the FPM SET A? <input type="text"/></p> <p>Rate the Support Provider by FPM SETA Staff During the Annexure 2 Process <input type="text"/></p> <p>Rate the Template Provider to Submit Your Annexure 2 Report to the FPM SETA <input type="text"/></p> <p><input type="button" value="Save"/> <input type="button" value="Cancel"/></p>															
4	Once the record is saved, one has the option to Edit or Remove it.	 <p>EVALUATION AND COMMENTS - TEST (2566666)</p> <p><input type="button" value="Create"/> <input type="button" value="Edit"/> <input type="button" value="Remove"/> <input type="button" value="Excel Importer"/></p> <table border="1"> <thead> <tr> <th>Experience Any Challenges</th> <th>Does The Annexure 2 Assist in Internal Planning</th> <th>Suggestions</th> <th>Support Provider Rating</th> <th>Templ</th> </tr> </thead> <tbody> <tr> <td>yes</td> <td>no</td> <td>yes</td> <td>Satisfactory</td> <td>Satisfac</td> </tr> <tr> <td>yes</td> <td>yes</td> <td>no</td> <td>Satisfactory</td> <td>Satisfac</td> </tr> </tbody> </table>	Experience Any Challenges	Does The Annexure 2 Assist in Internal Planning	Suggestions	Support Provider Rating	Templ	yes	no	yes	Satisfactory	Satisfac	yes	yes	no	Satisfactory	Satisfac
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yes	no	yes	Satisfactory	Satisfac													
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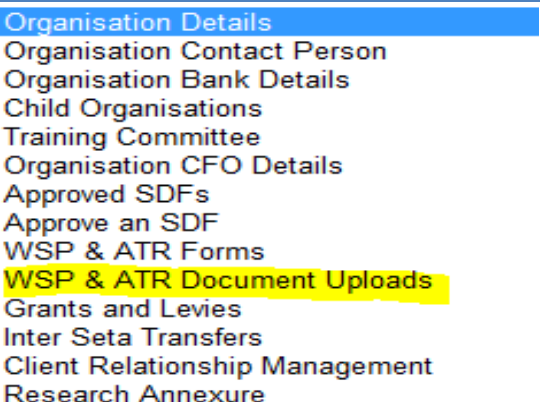
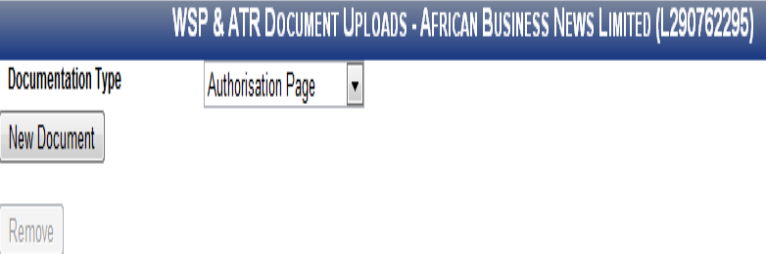
Printing of the Forms


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

Steps	Action	Screenshot
1	Click on Print	
2	The full report will be generated in PDF for download .Please print ,sign then submit	

Authorisation page

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

Steps	Action	Screenshot
1	Click on WSP & ATR Document Uploads	
2	Select Authorisation Page	

Steps	Action	Screenshot
3	Then you can click submit	

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