# **MQA Indicium**

Stakeholders Training Manual

# SDF Registration WSP/ATR Submission

Name:



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# **1 INTRODUCTION**

#### 1.1 Purpose of this Document

The purpose of this document is to ensure that Skills Development Facilitators (SDFs) are equipped with all the information pertaining to the MQA Indicium system. This will therefore permit the facilitator to register as an MQA Indicium SDF and will enable the SDF to comply with the submission of the Workplace Skills Plan (WSP) and Annual Training Report (ATR), by the legislative due date (30 April 2015).

#### 1.2 Scope of the Document

This document will assist the SDF by showcasing his/her roles and responsibilities in the Mining Qualification Authority (MQA)

#### 1.3 Terms and Definitions

The following terms are used in this document

#	Term / Acronym	Definition
1	Indicium	Latin for Information – name of the system developed for MQA.
2	SDF	Skills Development Facilitator
3	WSP	Workplace Skills Plan
4	ATR	Annual Training Report
5	Lookup Field	A field containing a set of values to select from, no other values than
		these can be used
6	Free Text Field	This field allows the SDF to enter any text
7	Numeric Field	This field allows the SDF to enter only numerical values
9	Alphanumeric Field	This field allows the SDF to enter alphabetical as well as numerical
		values
10	Currency Field	This field gets noted in Rand value

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# 2 PROCESS

Below the SDF Registration Process that will be discussed in this document.



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# **3 INDICIUM ACCESS**

### 3.1 Website

The MQA Indicium system can be accessed via the MQA website <u>www.mqa.org.za</u>. The **MIS Portal** option is available on the **Information System Links** section.



This link will revert to the MQA Indicium logon page

MQA Indicium SETA Management System		Welcome, - Lon out
	Log IN	
	Login Information	
	NOTICE > All Usernames & Passwords are CASE SENSITIVE! Username: Password: Login Eordol Password	
	Register an SDE	

#### 3.2 Technical Information

#### 3.2.1 Browsers

MQA Indicium is compatible with the following browsers:

- 1. Internet Explorer
- 2. Google Chrome





3. Mozilla FireFox



#### 3.2.2 Network / Group Policies

Company Group and Network policies might block traffic. This will cause the offline application not to function correctly. Please communicate the below to your IT department

When logging to the offline app, the system connects to the database for authentication purposes through a **web service** that's residing on <u>http://indicium.mqa.org.za/WSPATRService/WSPOffline.asmx</u>

Traffic should be permitted to move through the above URL, port 80 and 443.

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#### 3.2.3 Hardware Requirements

Minimum requirements for hardware are as follows

- Windows 7 or above
- Service Pack 1
- Intel Celeron minimum but Core i-3 or better suggested
- 2GB RAM minimum but 4GB suggested
- At least 20GB free hard drive space
- Microsoft Office
- Adobe PDF reader
- ADSL or 3G. Dial-up lines are not recommended.

#### 3.2.4 Forgotten Password

Once the SDF is registered on the system, it is possible to forget one's password therefore Indicium has an online 'forgot password' functionality. Please follow the following steps if you have forgotten your password.

Step	Action / Screenshot
1	The SDF navigates to the MQA Indicium Seta Management System page.
	SETA Management System
	Log IN
	Login Information
	NOTICE > All Usernames & Passwords are CASE SENSITIVEI Username: Password:
	Register an SDF
2	The SDF clicks on the Forgot Password link. Indicium will send an email with the username and temporary password. Use these details as on the logon page. NOTICE > All Usernames & Passwords are CASE SENSITIVE! Username: MQA0022 Password: Login
3	Indicium will revert the <b>Change Password</b> page for the SDF to update the password to a new password.
	CHANGE PASSWORD Your Password has expired please enter new password
	New Password:
	Confirm Password
	Change Password
	Back to Login

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Sten	Acti	on / Screenshot
	Plea	use note the following rules on Creating of Passwords:
	1 100	the following false of ofeating of factoria.
	#	Rule
	1	The length of the password must be at least 8 characters long
	2	Your password must contain one capital/upper case letter
	3	Your password must at least contain one digit number
	4	Your password must at least contain a <b>symbol</b> "{\*&%\$#@
	5	The password expires after 30 days, and the SDF will be required to enter a <b>new</b>
		password – each 30 days.
	The	SDE then clicks on the <b>Change Password</b> button to save the password Indicium will
	navi	gate to the logon screen once the password has been successfully changed
	navi	
		Change Password
4	Indic	cium will send the SDF an e-mail notification upon successful changing of passwords.
		File Message
		A Reply All Construction of the second secon
		Image: Second of the second
		From:         WSPno+reply@MQA.co.za         Sent:         Mon 09/02/2015 04:52 PM           To:         Alize Groenewald         Sent:         Mon 09/02/2015 04:52 PM
		Cc Subject: Confirmation of the new password
		Dear Alize Groenewald
		You have successfully reset your password. Please be advised that your password will expire after 30 days of resetting it.
		Tours sincerely
		Skills Development and Research Department
		09/02/2015

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4 SDF Registration This section outlines the registration steps to be followed by the SDF.

Step	Action / Screenshot
1	The SDF navigates to the MQA Indicium Seta Management System page.
	SETA Management System
	Log in
	Login Information
	NOTICE > All Usernames & Passwords are CASE SENSITIVEI Username:
	Password
	Login
	Forgot Password
	Register an SDE
2	The SDF selects the <b>Register an SDF</b> option at the bottom of this page.
	Log IN
	Login Information
	NOTICE > All Usernames & Passwords are CASE SENSITIVE!
	Password:
	Login
	Forgot Password
	Register an SDF
3	Indicium opens the pop-up Registration window.
	RECISTRATION
	REGISTRATION
	SDF
	Register Cancel
	The SDF has <b>two</b> options: i. <b>Cancel</b> – click on the <b>Cancel</b> button to cancel the registration process and return to the logon screen.

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Step	Action / Screenshot	
	ii. Register – click on the Register butt	on to continue with the registration process.
4	Indicium opens the Applicant Details form f	or the SDF to complete.
		INDICIUM
	Applicant Details	
	· · · · · · · · · · · · · · · · · · ·	
	ID No	
	Alternate ID Type	▼
	Title	<b></b>
	First Name	
	Middle Name	
	Surname	
	Initials	
	Date of Birth	
	Gender	
	Equity	▼

### Please note the following rules on this screen:

#	Field	Rule
1	ID NO	A South African ID Number must have 13 digits. Indicium uses the Department of Home Affairs rules to validate that the number you entered is a <b>valid</b> SA ID Number.
		This field is also used to identify persons with no South African ID. Therefore you can add your passport number, or any other number that you are using for identification in this field.
		Indicium will not allow duplicate ID's, therefore if you are registered already Indicium will not allow you to register again with the same ID No.
2	Alternate ID Type	The SDF will use this field to indicate the type of number that was entered in the ID No field where the number in the ID NO field is not a valid SA ID Nr.
3	Title	Indicium will populate this field where the ID No is a valid SA No. However, the SDF can update as well. Indicium will not populate this field where the ID No is another type of number and the SDF will need to update this field
4	Initials	This is a populated field where Indicium will populate the field with the first letter of the First Name
5	Date of Birth	Indicium will populate this field where the ID No is a valid SA No Indicium will <b>not</b> populate this field where the ID No is another type of number and the SDF will need to update this field.
6	Gender	Indicium will populate this field where the ID No is a valid SA No Indicium will <b>not</b> populate this field where the ID No is another type of number and the SDF will need to update this field.
7	Telephone Number	This number must be 10 characters, NO spaces

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8       Cell Phone Number       This number must be 10 characters, NO spaces         9       Fax Number       This number must be 10 characters, NO spaces         10       Physical / Postal code       Indicium will populate the following field when a valid Code is entered: • Municipality • Urban Rural • Province         11       Use Physical Address for Postal Address for Postal Address to the Postal Address so that the SDF does not need to capture the information gain.         12       SDF Type       When the SDF select Other (Please specify) from the SDF Type field, Indicium will validate that the SDF enters a value in the SDF Type Other field.         5       The SDF click's on the Submit button to submit the information captured.         Submit       Submit         6       Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         6       Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         6       Indicium closes the Application Proceeds to sending an email to the ema address for the SDF on the site of solar Development Facilitator Registration         7       Admonetalgened of Subs Development Facilitator Registration         8       Indicium closes the Application Details becoment Facilitator Registration         9       Fact with the diff develop attent the diff develop attent the diff dev	Acti	on / Screenshot		
<ul> <li>9 Fax Number This number must be 10 characters, NO spaces</li> <li>10 Physical / Postal code is entered: Indicium will populate the following field when a valid Code is entered: code</li> <li>Municipality</li> <li>Urban Rural</li> <li>Province</li> <li>11 Use Physical Address for Postal Address to the Postal Address to the Postal Address so that the SDF does not need to capture the information gain.</li> <li>12 SDF Type field, Indicium will validate that the SDF enters a value in the SDF Type field, Indicium will validate that the SDF enters a value in the SDF Type field, Indicium will validate that the SDF enters a value in the SDF Type field.</li> <li>5 The SDF click's on the Submit button to submit the information captured.</li> <li>Submit</li> <li>6 Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.</li> <li>6 Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.</li> <li>9 Tot Manager With Submit Steps Water Statistics Water Statis</li></ul>	8	Cell Phone Number	This number must be 10 characters, NO spaces	
<ul> <li>Physical / Postal code</li> <li>Indicium will populate the following field when a valid Code is entered:         <ul> <li>Municipality</li> <li>Urban Rural</li> <li>Province</li> </ul> </li> <li>If Use Physical Address for Postal Address so that the SDF does not need to capture the information gain.</li> <li>SDF Type</li> <li>When the SDF select Other (Please specify) from the SDF Type field, Indicium will validate that the SDF enters a value in the SDF Type field, Indicium vill validate that the SDF enters a value in the SDF Type Other field.</li> <li>The SDF click's on the Submit button to submit the information captured.</li> <li>Submit</li> <li>Indicium closes the Application Details window, and proceeds to sending an email to the emat address entered by the SDF on the initial logon of the Indicium system.</li> <li>Indicium closes the Application Details window, and proceeds to sending an email to the emat address entered by the SDF on the initial logon of the Indicium system.</li> <li>Indicium closes the Application Details window, and proceeds to sending an email to the emat address entered by the SDF on the initial logon of the Indicium system.</li> </ul>	9	Fax Number	This number must be 10 characters, NO spaces	
11       Use Physical       Select this box when the Physical and Postal Addresses are the same. Indicium will then copy the Physical Address to the Postal Address so that the SDF does not need to capture the information gain.         12       SDF Type       When the SDF select <b>Other (Please specify)</b> from the <b>SDF Type</b> field, Indicium will validate that the SDF enters a value in the <b>SDF Type Other fi</b> eld.         5       The SDF click's on the <b>Submit</b> button to submit the information captured.         Submit       Submit         6       Indicium closes the <b>Application Details</b> window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         7       Messee the Replication Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         6       Indicium closes the <b>Application Details</b> window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         7       The soft address entered by the SDF on the initial logon of the Indicium system.         8       Indicium closes the <b>Application Details</b> window; and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         9       Indicium closes the <b>Application Details</b> window; and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         9       Details the the SDF on Menager in Meager in Meager in Meager in State system in the system rea	10	Physical / Postal code	<ul> <li>Indicium will populate the following field when a valid Code is entered:</li> <li>Municipality</li> <li>Urban Rural</li> <li>Province</li> </ul>	
12       SDF Type       When the SDF select Other (Please specify) from the SDF Type field, Indicium will validate that the SDF enters a value in the SDF Type Other field.         5       The SDF click's on the Submit button to submit the information captured.         5       The SDF click's on the Submit button to submit the information captured.         6       Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         6       Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         7       Acknowledgment of Skills Development Facilitator Registration         8       Indicium Closes the Application Details evelopment Facilitator Registration         9       The SDF on the initial logon of the Indicium system.         9       The SDF on the initial logon of the Indicium system.         9       The SDF on the initial logon of the Indicium system.         9       The SDF on the initial logon of the Indicium system.         9       The SDF on the initial logon of the Indicium system.         9       The SDF on the initial logon of the Indicium System.         9       The SDF on the initial logon of the Indicium System.         9       The SDF on the initial logon of the Indicium System.         9       The SDF on the initial l	11	Use Physical Address for Postal Address	Select this box when the Physical and Postal Addresses are the same. Indicium will then copy the Physical Address to the Postal Address so that the SDF does not need to capture the information gain.	
<ul> <li>The SDF click's on the Submit button to submit the information captured.</li> <li>Submit</li> <li>Indicium closes the Application Details window, and proceeds to sending an email to the email address entered by the SDF on the initial logon of the Indicium system.</li> <li>Indicium closes the Application Details window, and proceeds to sending an email to the email address entered by the SDF on the initial logon of the Indicium system.</li> <li>Indicium closes the Application Details window, and proceeds to sending an email to the email address entered by the SDF on the initial logon of the Indicium system.</li> <li>Indicium closes the Application Details to the sender of Skills Development Facilitator Registration Message (HTML)</li> <li>Indice Repty All Control of Skills Development Facilitator Registration Sent: Mon 09.02/2015.04.12 PM To Manager To Manager To Manager To Sent: Mon 09.02/2015.04.12 PM To Manager To Manager To Manager To Manager To Sent: Mon 09.02/2015.04.12 PM To Manager To M</li></ul>	12	SDF Type	When the SDF select <b>Other (Please specify)</b> from the <b>SDF Type</b> field, Indicium will validate that the SDF enters a value in the <b>SDF Type Other</b> field.	
<ul> <li>5 The SDF click's on the Submit button to submit the information captured.</li> <li>Submit</li> <li>6 Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.</li> <li>6 Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.</li> <li>6 Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.</li> <li>6 Indicium closes the Application Details Development Facilitator Registration - Message (HTML)</li> <li>7 Team E-mail</li> <li>8 The Stage</li> <li>9 Forward</li> <li>9 Team E-mail</li> <li>9 Cotegorize + Follow Up + Tanslet - Zoom Evenote</li> <li>9 Evenote</li> <li>9 Forward - Groenewald</li> <li>9 Thank you for registering' as a Skills Development Facilitator Registration</li> <li>9 Dear Alize Groenewald</li> <li>9 Thank you for registering' as a Skills Development Facilitator on the MQA MIS Portal.</li> <li>9 Your login details for the MIS portal are as follows:</li> <li>9 Username: MQA0022</li> <li>9 Password: Groenewald</li> <li>9 Please note that the password is case sensitive and you will be required to reset your password when you in the to the system for the first time after having received this e-mail. Click on the below link MOA Indicime Please do not forward the email because it's linked to your profile.</li> </ul>				
6       Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.         6       Indicium closes the Application Details window, and proceeds to sending an email to the emaa address entered by the SDF on the initial logon of the Indicium system.         Implication Details Development Facilitator Registration - Message (HTML)         Implication Details Development Facilitator Registration         Implication Details Development Facilitator Registration         Delete Repy All To Manager West Development Facilitator Registration         Follow Up Translet Coom Development Facilitator Registration         Delete Repy All To Manager Physic Development Facilitator Registration         Delete Repy All To Manager Physic Development Facilitator Registration         Development Facilitator Registration         Development Facilitator Registration         Development Facilitator at an as follows:         Username: MQA0022 <td cols<="" th=""><th>The</th><th>SDF click's on the S</th><th><b>ubmit</b> button to submit the information captured.</th></td>	<th>The</th> <th>SDF click's on the S</th> <th><b>ubmit</b> button to submit the information captured.</th>	The	SDF click's on the S	<b>ubmit</b> button to submit the information captured.
6 Indicium closes the Application Details window, and proceeds to sending an email to the ema address entered by the SDF on the initial logon of the Indicium system.			Submit	
Image: Construction of Skills Development Facilitator Registration - Message (HTML)         Image: Construction of Skills Development Facilitator Registration - Message (HTML)         Image: Construction of Skills Development Facilitator Registration - Message (HTML)         Image: Construction of Skills Development Facilitator Registration - Message (HTML)         Image: Construction of Skills Development Facilitator Registration         Image: Construction of Skills Development Facilitator Registration         Image: Construction of Skills Development Facilitator Registration         Image: Construction of Skills Development Facilitator on the MQA MIS Portal.         Image: MQA0022         Password: Groenewald         Please note that the password is case sensitive and you will be required to reset your password when you log in to the system for the first time after having received this e-mail. Click on the below link MQA Indicium Please do not forward the email because it's linked to your profile.	Indic addr	ium closes the <b>App</b> l ess entered by the S	<b>lication Details</b> window, and proceeds to sending an email to the email DF on the initial logon of the Indicium system.	
Please contact the MQA SDR Department on <u>skillsplanning@mqa.org.za</u> or 011 547 2600 if you did not request to be registered on the MQA MIS Portal or you are not sure why you received this e-mail.	FI TA C S	Message Reply Pelete Delete WSPno-reply@MQA.co MSPno-reply@MQA.co Mize Groenewald; Val Cubject: Acknowledgment of Dear Alize Groenewald Thank you for registering/ Your login details for the inter- Username: MQA0022 Password: Groenewald Please note that the passw to the system for the first of do not forward the email by Please contact the MQA System of t	Inbox       Important in the second of the sec	
		Actives 8 9 10 11 12 The Indicaddr	Action / Screenshot         8       Cell Phone Number         9       Fax Number         10       Physical / Postal code         11       Use Physical Address for Postal Address         12       SDF Type         The SDF click's on the Sufficient closes the Appl address entered by the Sufficient closes closes the Appl address entered by the Sufficient closes clos	

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4.1 SDF First Logon The SDF is required to change the password upon first logon, in order to do this, the following steps are to be followed

-	
1	The SDF navigates to the MQA Indicium Seta Management System page.
	MQA Indicium SETA Management System
	Log In
	Login Information
	NOTICE > All Usernames & Passwords are CASE SENSITIVE! Username: Password:
	Login
	Forgot Password
	Register an SDF
2	development facilitator email, received upon the submission of registration.
	Username: MQA0022 Password: Groenewald Please note that the password is case sensitive and you will be required to reset your password when you log in to the system for the first time after having received this e-mail. Click on the below link MQA Indicium Please do not forward the email because it's linked to your profile. Please contact the MQA SDR Department on <u>skillsplanning@mqa.org.za</u> or 011 547 2600 if you did not request to be registered on the MQA MIS Portal or you are not sure why you received this e-mail.

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Step	Action / Screenshot
	<b>Note</b> the username will remain the same but the SDF will need to change his/her password after a period of time.
3	The Indicium usernames and passwords are case sensitive!
	NOTICE > All Usernames & Passwords are CASE SENSITIVE! Username: MQA0022 Password: Login The SDE needs to click on the Login button once the Username and Password is entered
4	The SDF needs to enter a <b>NEW</b> Password, and <b>CONFIRM</b> the password.
	Change Password: Confirm Password: Change Password Back to Login
	Please note the following rules for creating passwords:
	Please note the following fules for creating passwords.
	<ul> <li># Rule</li> <li>1 The length of the password must be at least 8 characters long</li> <li>2 Your password must contain one capital/upper case letter</li> </ul>
	3 Your password must at least contain one digit number
	<ul> <li>Your password must at least contain a symbol "{\*&amp;%\$#@</li> <li>The password expires after 30 days, and the SDE will be required to enter a new</li> </ul>
	password – each 30 days.
	The SDF then clicks on the <b>Change Password</b> button in order to save the password. Indicium will navigate to the logon screen once the password has been successfully changed.
	Change Password
5	Indicium will send the SDF an e-mail notification upon successful changing of passwords.
	Confirmation of the new password - Message (HTML) Message Reby All To Manager Detete Reby All To Manager Detete Reby All To Manager Move Tags To Manager Categorizer Folow Up- Tags To Manager Comment Categorizer Tags To Manager Sent: Mon 09/02/2015 04:52 PM Acd to Detende Solution To Manager Sent: Mon 09/02/2015 04:52 PM To Sent: Mon 09/02/2015 04:52 PM To Sent: Mon 09/02/2015 04:52 PM To Subject: Skills Development and Research Department 09/02/2015

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### 4.2 Register Organisation on SDF Profile

The SDF must now register on his/ her profile, the organisations he/she required to access. In order to do this the following steps must be followed.

Note: The below steps can be followed in order to link all the required organisations to the SDF's profile

Step	Action / Screenshot
1	The SDF navigates to the MQA Indicium Seta Management System page and enter your login details and click on <b>Login</b> .
	MQA Indicium SETA Management System
	Log IN
	Login Information
	NOTICE > All Usernames & Passwords are CASE SENSITIVEI Username: Password:
	Login
	Forgot Password
	Register an SDF
2	The SDF enters the generated <b>Username</b> and <b>New Password</b> , and then proceeds to clicking on the <b>Login</b> button.
3	Indicium reverts to the Skills dashboard
	MQAIndicium SETA Management System
	Welcome to MQA Indicium!
	Please select a menu option above to continue.
4	The SDE clicks on the <b>Skille</b> many option
4	The SDF clicks on the <b>Skins</b> mend option.
	MQA Indicium
	Skills
	WELCOME TO MQA INDICIUM!
	NININE GRALIFICATIONE ANTRODUTY
	Please select a menu option above to continue.
5	Indicium opens the page with two options:

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Step	Action / Screenshot
	Organisation
	• SDF
	<b>Note</b> : To change the view of this screen in order to display these options at the top, simply click
	on the black button showcasing a white arrow.
	Welcome, Alize - Pending SDF
	SETA Management System
	Skills
	SETA Municipality Superior
	SDF
6	The SDE must click on the <b>SDE</b> menu ontion
0	The SDI must click on the SDI mend option.
	Chille
	Skills
	Skills >>
	Ortina este
	Organisation
	(SDF)
7	Search for the SDE details by completing one of the filters on the page which opens on the right
'	side of the screen. Once a filter is completed click on the <b>Search</b> button
	Skills >>
	Organisation SDF
	SDF First Name
	Surname
	ID No.
	Province
	Search
8	Indicium will return the SDF details.
	First Name Surname ID No Action
	Alize Groenewald 7910160088088
9	To access the SDF, select the row and then click on the <b>Action</b> button.
	Circt Namo Surnamo ID No Action
	rust name sumane ib no Action
	Mize Gloenewaid 7910160088088
10	Indicium opens a page with the SDF's personal details. This page allows for the updating of any
	personal details. To enable the fields, click on the Edit button.

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Oton	Action / Demonshet		
Step	Action / Screenshot		
	SKIIIS >>SDF >>	1	D 0 0 701016000000
	Organisation Details		PERSON DETAILS - ALIZE GROENEWALD 7910160088088
	Committee Approval Letter Upload	Edit	
	Verification Letter Upload	ID No	7910160088088
		Alternate ID Type	Passport Number
		Title	Ms
		First Name	Alize
11	The SDF must select the O	rganisation De	tails option from the menu.
		Skills >>SDF >	>
		Person Dete	ile
		T elson Den	No. of Concession, State of Co
		enganisation	Details
		Committee (	pproval Letter Upload
		Verification I	_etter Upload
12	Indiaium will anon a naga c	n the right her	d side allowing the CDE to esperah for the ergonizations
12	indicium will open a page c	on the right han	a side allowing the SDF to search for the organisations
	required.		
			D 4 0 70404000000
		ORG	ANISATION DETAILS - ALIZE GROENEWALD 7910160088088
	Organisation		
	SDE Role		•
	551 100		
	Letter of Appointment: Select up	load	Choose File No file chosen
	1000 (MAR)		Choose The No hie chosen
	14		
	Save		
13	The SDF clicks on the mag	nifying glass to	open the Organisation search screen.
	The SDF searches for the C	Organisation in	order to link to this profile by adding the L number of the
	organisation in the SDL Nu	mber field and	then clicks on the <b>Search</b> screen.
	14		
		9	Drganisation ID
		-	
	SDL Number	L35	1733343
	Search		
	Select Cancel		
		f 41	
14	indicium returns the results	s for the criteria	used. The SDF will select the organisation (Indicium
	win nigniight the organisatio	in), and then cli	
1			

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Step	Acti	ion / Screenshot	
			Organisation ID
	S	DI Number	1 250722242
	S	earch	L350/33343
	0	earch	
	O	rganisation Legal Name	Organisation Trade Name SDL Number
	AM	PLATS MANAGEMENT SERVICES	AMPLATS MANAGEMENT SERVICES L350733343
	Fi	at Previous Next Last	Go to Page 1 Page 1 of 1
	Se	elect	
15	Indi	cium adds the details of	f the organisation in the <b>Organisation</b> field. The SDF now needs to
	seie	ect the <b>Role</b> from the <b>SD</b>	
			OPCANISATION DETAILS - ALIZE GROENEWALD 7910160088088
			ORGANISATION DETAILS - ALEE ORGENENALD FOTOTOODDOOD
	0	rganisation	AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES
	SI	DF Role	Primary SDF
	Le	tter of Intent: Select upload	Choose File No file chosen
	Sa	ive	
	Plea	ase note the following ru	les for the SDF Role:
	1 100		
	#	Option	Rule
	1	Primary SDF	The <b>Primary SDF</b> has <b>FULL</b> access in that he/she can view,
			has <b>Primary SDF</b> role access.
	2	Secondary SDF	The <b>Secondary SDF</b> has <b>VIEW</b> access only to the Organisation
			where the SDF has Secondary SDF role access
	3	Secondary SDF	The Secondary SDF Capturer has VIEW access to the Organisation however will be able to capture the WSP/ATP
			only where the SDF has Secondary SDF Capturer role to the
			organisations they are linked to.

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Step	Action / Screenshot
	Organisation Details - Alize Groenewald 7910160088088
	Organisation
	SDF Role Primary SDF V
	Letter of Intent: Select upload Choose File Do file chosen
	Save
17	The SDF will select the signed Letter of Intent from the location where it is saved and clicks on
	the <b>Open</b> button to link it to the Organisation.
	C Open
	Organize ▼     New folder       Image: Second secon
	Deskop     Deskop
	Licent view
	Music     Q     Documents     Q     Q     Documents     Q     Q     Documents     Q     Q     Documents     Q
	Videos @ WQA Internal Testing, DRG SDF FEPORTS Para 3 2014228.docx @ MQA Internal Testing.SDF Process 1 - 7.docx  [* Computer @ consulting Periods Netaddock
	Local Disk (C) HP_RECOVERV (T * *
	riename All Hies Cancel
18	A successful upload shows a <b>green</b> upload line, a <b>red</b> line will be displayed if Indicium did not
	process.
	Organisation Details - Alize Groenewald 7910160088088
	Organisation
	SDF Role Primary SDF ▼
	Letter of Intent: Select upload Choose File Consulting Pretoria Lhead dotx
	Save
19	Indicium will link the organisation to the SDF, displaying the details as follows:
	Organisation Name SDL Number Status Role Document Name
	AMPLATS MANAGEMENT SERVICES L350733343 Pending Primary SDF Testing.docx
20	The Status of the SDF for the organisations linked, will show Pending until the SDF has
	completed the updates on the organisation and uploads the Verification letter. This will be
	discussed further in this document.
	Organisation Name SDL Number Status Role Document Name
	AMPLATS MANAGEMENT SERVICES 1350733343 Pending Jrimary SDF Testing docy
	Total and the second control of the second sec

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### 4.3 Update Organisation Profile

Once the SDF linked the Organisation to the SDF profile, the SDF needs to ensure that the Organisation is updated correctly. This section will guide the SDF on the sections that need to be updated and the steps necessary to ensure that updates are done.

#### 4.3.1 Organisation Details

The SDF needs to ensure and confirm that the Organisation details are up to date.

Step	Action / Screenshot
1	The SDF navigates to the MQA Indicium Seta Management System page, enters his/her login
	MQA Indicium
	SETA Management System
	MINING QUALIFICATIONS AUTHORITY
	Log IN
	Login Information
	NOTICE > All Usernames & Passwords are CASE SENSITIVE
	Osemane:
	Password:
	Login
	Forgot Password
	Register an SDF
2	Indicium reverts to the Skills dashboard.
	Welcome, Alize - Pending SDF
	SETA Management System
	NINING QUALIFICATIONS AVTRONTY Skills
	WELCOME TO MQA INDICIUM!
	NIKIKS QUALIFICATIONS ANTRONITY
	Please select a menu option above to continue.
3	The SDF clicks on the <b>Skills</b> menu option.
	SETA Management System
	WELCOME TO MQA INDICIUM!
	BINING QUALIFICATIONS ANTRONITY
	Please select a menu option above to continue.
4	The SDF must click on the <b>Organisation</b> menu option.

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Step	Action / Screenshot
	Skills
	Skills >>
	SDF
5	Indicium will open a form on the right hand side of the screen, allowing the SDF to search for the
	organisation, completing one of the filters and clicking on the Search button. Alternatively, the
	filters can be left blank and the <b>Search</b> button can simply be clicked
	ORGANISATION
	Legal Name
	Trade Name
	SDL Number (L350733343)
	Search
6	Indicium will return the information according to the search criteria or will return all the
	organisations linked to the SDF in the event that the SDF searched without chiena.
	Organisation
	Legal Name
	Trade Name
	SDL Number
	Search
	Legal Name         Trade Name         SDL Number         SIC Code         Parent SDL Number         Action
	AMPLATS MANAGEMENT SERVICES AMPLATS MANAGEMENT SERVICES L350733343
	First         Previous         Next         Last         Go to Page         1         Page 1 of 1
7	To access the organisation details, select or highlight by clicking on the organisation name and
	then click on the <b>Action</b> button.
	Legal Name Trade Name SDL Number SIC Code Parent SDL Number Action
	AMPLATS MANAGEMENT SERVICES AMPLATS MANAGEMENT SERVICES L350733343
	First Previous Next Last Go to Page 1 Page 1 of 1
Q	Indicium opens the organisation profile, on the <b>Organisation Dotails</b> screen
U	indicium opens the organisation prome, on the <b>organisation betans</b> screen.
	Skib
	BitOperation v- Occasedators Dirace - AMPLATS MANAGEMENT SERVICES (L350733343)  Operation from Code Strate Strate Operation from Code Strate Operation from Code Strate Stra
	Training Generations Dependent (7C) Generation WSP & ATR Form B 15973330 US973330 US973330
	Date Name         AUP-X13 MAAKDB1011 5ERVCED         AUP-X13 MAAKDB1011 5ERVCED           Organization Registration Neurolity Type         Index Name         Index Name           Organization Registration Neurolity Type         Index Name         Index Name
	Opperature         0           Para         11150564           Para         11150564           Fail Number         0
	Sector 0 Sector
	Total Review     12       Organization Sign     1       Prystatic Column     2011
0	To adit or undeta the organization datails the ODE will aligh the Edit butter for Indiaires to such the
Э	To east or update the organisation details the SDF will click the <b>East</b> button for indicium to enable

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Action / Screenshot		
	ORGANISATION DETAILS - AMPLATS MANAGEMENT SERV	VICES (L350733343)
Edit	SETA	DHET
Levy Number Type	0	0
SDL Number	L350733343	L350733343
Legal Name	AMPLATS MANAGEMENT SERVICES	AMPLATS MANAGEMENT SERVICES
Trade Name	AMPLATS MANAGEMENT SERVICES	AMPLATS MANAGEMENT SERVICES
the SDF must check this selecting the tick box to save the informatio	information, the SDF is required to o called <b>Confirm Organisation Details</b> in. Distan Province onfirm Organisation Details	s and then clicking on the <b>Save</b> button
	Action / Screenshot	Action / Screenshot ORGANISATION DETAILS - AMPLATS MANAGEMENT SERVICES SETA SETA Levy Number Type 0 SDL Number L350733343 Legal Name AMPLATS MANAGEMENT SERVICES Trade Name AMPLATS MANAGEMENT SERVICES The SDF must check / update the Organisation details ensuthe SDF checks this information, the SDF is required to selecting the tick box called Confirm Organisation Details to save the information. POSULI PLOVINCE Confirm Organisation Details Save Lancel

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4.3.2 Organisation Contact Person Details The SDF needs to ensure and confirm that the Organisation Details are up to date.

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To add or edit or remove the Organisation Contact Person Details, the SDF will click on the
	Organisation Contact menu option.
	Skills
	Skills >> Organisation >>
	Organisation Contact
	Organisation Bank Details
	Child Organisations
	Organisation CFO Details
	WSP & ATR Forms
3	To <b>Create</b> a new contact, the SDF will click on the <b>Create</b> button.
	ORGANISATION CONTACT - AMPLATS MANAGEMENT SERVICES (L350733343)
	Create
	Note:
	<ul> <li>Please note that at least one 'Senior Financial Representative / CFO', one 'Senior Organisation Representative /CEO', and one 'Organisation contact Person (other than SDF)' are required for SDF Verification process.</li> </ul>
4	Indicium will open the Create Organisation Contact screen. The SDF must complete the fields
-	and click on the <b>Save</b> button to save the contact captured
	CREATE ORGANISATION CONTACT
	Title Title
	Telephone Number
	Cell Phone Number
	Fax Number
	E Mail
	Postal Code
	Postal Address Line 1
	Postal Address Line 2
	Postal Address City
	Postal Province
	Save
5	Indicium saves the information on the Organisation Contact screen.
	ORGANISATION CONTACT - AMPLATS MANAGEMENT SERVICES (L350733343)
	Title First Surname Initials Designation Telephone Phone Number E Mail Postal Post
	Training course of the
	Mrs Alize Groenewald A Manager U124561236 U121213456 U124569874 agroenewald@dtss.co.za 0081 1213 POBox Pretoria Gaute
	First Previous Next Last Go to Page 1 Page 1 011
	Note: • Please note that at least one 'Senior Financial Representative / CFO' one 'Senior Organisation Representative /CFO' and one 'Organisation contact Reson (other than SDE' or a senior of the s
	required for SDF Verification process.

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Step	Action	n / Scree	enshot						
6	To <b>Ed</b> open t	it the sp he conta	ecific con act details	tact deta page. L	ills, select th Ipdate the d	e contact fr etails requir	om the list ed and clicl	and click of on the <b>Sa</b>	on the <b>Edit</b> button t ive button.
	Creat	Edit	Remove	Org	anisation Co	NTACT - AMI	PLATS MA	NAGEMEN	IT SERVICES (L38
	Title	First Name	Surname	Initials	Designation	Telephone Number	Cell Phone Number	Fax Number	E Mail
	Mrs	Alize	Groenewald	A	Training Manager	0124561236	0121213456	0124569874	agroenewald@dtss.co.z
	First	Previous	s Next	Last Go	to Page 1	Page 1 of 1			
,	To <b>Re</b> button	move the to remo	ne specific ove the cor	contact ntact fror OR	details, sele n the contac GANISATION C	ect the cont t details pag	act from the ge. IPLATS MA	e list and c	lick on the <b>Remo</b>
	Crea	te Edit	Remove						
	Title	First Name	Surname	Initials	Designation	Telephone Number	Cell Phone Number	Fax Number	E Mail
	Wirs	Alize	Groenewal	I.A.	Training Manager	0124561236	0121213456	0124569874	o agroenewald@dtss.co
	First	Previou	us Next	Last G	o to Page 1	Page 1 of 1			

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4.3.3 Organisation Bank Details The SDF needs to validate the banking details currently on the MQA records.

Step	Action / Screenshot	
1	Follow steps 1 – 7 in section	n 7.1
2	To <b>validate</b> the <b>Organisati</b> menu option.	on Bank Details the SDF will click on the Organisation Bank Details
		Skills
		Skills >>Organisation >>
		Organisation Details Organisation Contact
		Child Organisations Training Committee Organisation CFO Details WSP & ATR Forms
3	The SDF needs to ensure impact on the Grant Payme The SDF can only view the	that the details reflected on Indicium is correct as this will have an nts. details. GANISATION BANK DETAILS - AMPLATS MANAGEMENT SERVICES (L350733343)
	Name of Account Holder	None
	Bank Name	0
	Account Type	0
	Account Number	None
	Branch Name	None
	Branch Code	None
	Last Date Updated	None
	Last Updated By	None
	Verification Status	None

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4.3.4 Linking Child Organisations The SDF needs to ensure that all the Child Companies are linked (if applicable).

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To link the Child Organisation Bank to the organisation (Parent Organisation), the SDF will click on the Child Organisations menu option.
	Skills >> Organisation >>
	Organisation Details Organisation Contact Organisation Bank Details Child Organisations Training Committee Organisation CFO Details WSP & ATR Forms
3	To link a <b>Child Organisation</b> the SDF must click on the <b>Link Child Organisations</b> button.
	CHILD ORGANISATIONS - A Link Child Organisations Save Remove View Child No Records have been found for your search
4	Indicium will open the window for the SDF to search for the company that is required to be linked to the SDF. The SDF will complete one of the search criterias and click on the Search button for Indicium to return the information.
5	Indicium will return the results as per the search criteria. The SDF will select the company by ticking the <b>Select</b> tick box and clicking on the <b>Link Child Organisations</b> button.
	Legal Name
	Trade Name
	SDL Number L210740595
	Search
	Select Legal Name Trade Name SDL Number
	HYDROSOL PLATINUM HYDROSOL PLATINUM TECHNOLOGIES TECHNOLOGIES L210740595
	Link Child Organisations Cancel

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Step	Action / Screenshot						
6	Indicium will link the orga	anisation selected in step 5 to t	he Main (Parent) Organisa	ation.			
		CHILD ODCANISATIONS - AMPLATS	MANAGEMENT SERVICES (	350733343)			
				20001000-10)			
		Ve Remove View Child					
	Legal Name	Trade Name	SDL Number Link Start Date	E Link End Date			
	HYDROSOL PLATINUM TECHNOL	OGIES HYDROSOL PLATINUM TECHNOLOG	GIES L210740595 01/04/2014				
	First Previous Next Last	Go to Page 1 Page 1 of 1					
7	To <b>View</b> the specific chi	ld organisation select the orga	nisation from the list and o	click on the View			
-	Child button to open the	organisation details page of th	e child organisation.				
	64						
		Child Organisations - A	MPLATS MANAGEMENT	SERVICES (L			
	Link Child Organisations	Save Remove View Child					
	Legal Name	Trade Name	SDL Number	Link Start Date			
	HYDROSOL PLATINUM TEC	HNOLOGIES HYDROSOL PLATINUM	TECHNOLOGIES L210740595	01/04/2014			
	First Previous Next	Last Go to Page 1 Page 1 of 1					
8	To <b>Remove</b> the specific	child organisation if incorrectly	linked, select the organisation	ation from the list			
	and click on the <b>Remove</b>	e button.					
	Child Organisations - AMPLATS MANAGEMENT SERV						
	Link Child Organisations	Save Remove View Child					
	Legal Name	Trade Name	SDL Number	Link Start Date			
	HYDROSOL PLATINUM TE	CHNOLOGIES HYDROSOL PLATINUM	TERHNOLOGIES 1210740595	01/04/2014			
	First Provious Next	Last Go to Page 1 Page 1 of 1		a nanonana ser			
	THE TREVIOUS NEXT	Case Go to rage 1 rage for					

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### 4.3.5 Training Committee

The SDF is required to capture the details of the Training Committee Members where the number of employees in the organisation is more than 50.

Step	Action / Screenshot	
1	Follow steps 1 – 7 in section	7.1
2	To add <b>Training Committee</b> Committee menu option.	• Members to the organisation, the SDF will click on the Training Skills
	_	Skills >>Organisation >>
		Organisation Details
		Organisation Contact
		Organisation Bank Details
		Child Organications
		(maning committee)
		WSP & ATR Forms
3	The SDF will click on the <b>A</b> Committee window.	Add Training Committee Members button to open the Training
		TRAINING COMMITTEE - AWIT EATS MANAGEMENT
	Add Tariaian Committee I	Local Education
	Add Training Committee M	lembers 1
	No Records have been found	for your search
4	Indicium will open the <b>Traini</b> SDF needs to click on the <b>Sa</b>	<b>ng Committee</b> window for the SDF to capture the information. The <b>ve</b> button to save the information captured.
	Title	T
	First Name	
	Surname	
	Initials	
	Training Member	Туре
	Designation	
	Telephone Numbe	
	Cell Phone Numb	er
	Fax Number	
	E Mail	
	Name Of Union	
	Position In Union	
	Save	]
		•

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		n wiii 3a	ve ui	e training c	ommillee				liee pa	ye.	
				TRAINING COMM	ITTEE - AMPLA	TS MANAGEM	ENT SERVIC	CES (L350733343)			$\odot$
	Add Train	ing Committee	Member	S							
	First Name	Surname	Initials	Training Member Type	Telephone Number	Cell Phone Number	Fax Number	E Mail	Name Of Union	Position In Union	Update
	Janis First P	Viljoen revious Nex	J t Last	Other Go to Page 1	0124563214 Page 1 of 1	0874561234	0125647896	agroenewald@dtss.co.za	Union 1	Union Position	
	To upd	ate the	Train	ina Comr	nittee me	mber, the s	SDF will	select the me	mber a	nd then a	click o
;	To upd the <b>Up</b>	ate the <b>date</b> but	Train ton to	<b>ing Comm</b> o open the	<b>nittee me</b> details of	mber, the the the member	SDF will er. The s	select the me SDF must clic	mber a k on the	ind then c e <b>Save</b> bu	click c utton
;	To upd the <b>Up</b> save th	ate the date but e details	Train ton to s upd	<b>ing Comm</b> o open the ated.	nittee me details of	mber, the the the member	SDF will er. The S	select the me SDF must clic	mber a k on the	ind then c e <b>Save</b> bu	click d utton
5	To upd the <b>Up</b> save th	ate the <b>date</b> but le details sumame	Train ton to s upd	ing Comm o open the ated. Training Member Type	tittee me details of	mber, the state the member	SDF will er. The s	Select the me SDF must clic	mber a k on the Name Of Union	nd then c e <b>Save</b> bu Position In Union	utton

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## 4.3.6 Organisation CFO Details

Step	Action / Screenshot	
1	Follow steps 1 – 7 in section 7	7.1
2	To add <b>CFO Details</b> to the menu option.	organisation the SDF will click on the Organisation CFO Details
		Skills >>Organisation >>
		Organisation Details
		Organisation Contact
		Child Organisations
		Traiping Committee
		Organisation CFO Details
		WSP & ATR Forme
3	The SDF will click on the Edit	button to enable the fields for editing.
		-
	Organ	ISATION CFO DETAILS - AMPLATS MANAGEMENT SERVICES (L350733343)
	Edit	
	Name of CFO	None
	Surname of CFO	None
	CFO Cell Phone Number	None
	CFO Fax Number	None
	CFO Email Address	None
4	The SDF must click on the Sa	<b>ve</b> button to save the details.
	CFO E	mail Address
	Save	ancel

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### 4.4 Create the Verification Report

In order for the SDF to be accepted, and to get access to the WSP/ATR forms, the SDF is required to select the scenarios for the WSP/ATR submission as well as create, sign and upload the verification report for the specific organisation.

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To create the verification report, the SDF will navigate to the WSP/ATR section by clicking on the <b>WSP &amp; ATR Forms</b> menu option.
	Skills
	Skills >>Organisation >>
	Organisation Details Organisation Contact Organisation Bank Details Child Organisations Training Committee Organisation CFO Details WSP & ATR Forms
3	The SDF must select the applicable Financial Year from the lookup field and click on the Create button.           WSP & ATR Forms - AMPLATS MANAGEMENT SERVICES (L350733343)           View         Edit           Summary Report           Financial Year         01 April 2015 - 31 March 2016 Create           No Records have been found for your search
4	Indicium will create the forms for the specific <b>Financial Year</b> selected.
	Skills Year Form Type Linked Grant Status Due Date Status Date Submission Date
	01 April 2015 – 31 March 2016 Forms         Yes         Created         30/04/2015         11/02/2015           First         Previous         Next         Last         Go to Page         1         Page 1 of 1
5	The SDF will select the record created and click on the <b>Edit</b> button.
	WSP & ATR FORMS - AMPLATS MANAGEMENT SERVICES (L350 View Edit Summary Report
	Financial Year
	Skills Year Form Type Linked Grant Status Due Date Status Date Sub-inssion Date
	01 April 2015 - 31 March 2016 Forms Yes Created 30/04/2015 11/02/2015
	First Previous Next Last Go to Page 1 Page 1 of 1

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#### Step Action / Screenshot

6 The SDF must select the scenario for the WSP record created from the **Submission Scenario** lookup list and click on the **Save** button.

		E		
		Enr		
	Organisation Legal Name	AMPLATS MANAGEMENT SERVICES		
	Financial Year	01 April 2015 – 31 March 2016 🔻		
	WSP Status	Created		
	Form Type	Forms •		
	Due Date	30/04/2015		
	Submission Scenario			
	Submitted By	Child		
	Submitted Date	Consolidated		
	Approved By	Parent		
	Approved Date			
	Rejected By			
	Rejected Date			
	Saus Canad	11		
	Save Cancer			
	Please refer to the Requirements docun	ment for the explanation of the scenarios.		
7	The SDF now needs to navigate to the li	list of organisations linked to the SDF profile. This is done		
	by clicking on the <b>Skins</b> menu option, an	Ind selecting the <b>SDF</b> option from the ment options		
	Skills			
	Skills >>			
	Organisatio	tion		
	SDF			
		•		
8	The SDF will search for their own profile,	e, and then access it (steps 7 – 10 section 6)		
9	then clicks on the Generate Verification	nat requires the <b>Verification Letter</b> to be generated and		
	Remove Generate Verification Lette	ter		
	Nemore Cenerate Vemication Lette			
	Organisation Name	Spenumber Status Role Document Name		
	AMPLATS MANAGEMENT SERVICES L	.350733343 Pending Primary SDF Testing docs		
	First Previous Next Last Go	o to Page 1 Page 1 of 1		
	NOTE: The Verification letter can only h	be generated once an Organisation constructs at least one		
	Senior Financial Representative or CFC	O, one Senior Organisation Representative or CEO. and		
	one Organisation contact Person (other	r than SDF) are uploaded for SDF Verification process.		
10	Once the Varification Latter is signed	the SDE must uplead this latter by following store 7 10		
10	Once the vernication Letter is signed,	, the SUF must upload this letter by following steps 7 – 10		

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р	Action / So	creenshot	
			-

Step	Action / Screenshot				
	section 6, click on the Verification Lette	r Upload menu option,.			
	Skills				
	JAN 13				
	Skills >>SDF >>				
	Person Details				
	Organis	ation Details			
	Verifica	tion Letter Upload			
11	The SDF needs to select the Organisat clicking on the magnifying glass next to <b>C</b>	tion for which the <b>Verification Letter</b> is intended fo <b>Drganisation.</b>	or by		
	Organization				
	Organisation				
	Verfication Letter: Select upload	Choose File No file chosen			
12	The SDF will search for the organisation	n completing one of the filters and clicks on the Sea	arch		
	button or alternatively the <b>Search</b> button	is solely clicked on – Indicium will return the results	s per		
	inter chiena, or return an organisations in	iked to the SDF, if doing a blank search.			
	The SDF will select the organisation b	y clicking on the organisation name and clicks on	the		
	Select button.				
		Organisation ID			
	Organisation Legal Name	Organisation ID			
	Organisation Legal Name Organisation Trade Name	Organisation ID			
	Organisation Legal Name Organisation Trade Name SDL Number	Organisation ID			
	Organisation Legal Name Organisation Trade Name SDL Number Search	Organisation ID			
	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name	ORGANISATION ID			
	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES	ORGANISATION ID			
	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES First Previous Next Last Go to Page 1	ORGANISATION ID			
	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES First Previous Next Last Go to Page 1 Select Cancel	ORGANISATION ID         Image: state of the state of			
13	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES First Previous Next Last Go to Page 1 Select Cancel The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will set	ORGANISATION ID         organisation Trade Name       SDL Number         AMPLATS MANAGEMENT SERVICES       L350733343         Page 1 of 1       Letter by clicking on the Choose File button and fol save the upload by clicking on the Save button.	lows		
13	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES First Previous Next Last Go to Page 1 Select Cancel The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will section 15. The SDF will secting 15. The SDF wi	ORGANISATION ID         organisation Trade Name         SDL Number         AMPLATS MANAGEMENT SERVICES         Lasson 1 of 1	lows		
13	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES First Previous Next Last Go to Page 1 Select Cancel The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will section 6.	ORGANISATION ID         organisation Trade Name         SDL Number         AMPLATS MANAGEMENT SERVICES         Page 1 of 1    Lassor File button and fol save the upload by clicking on the Save button. TION LETTER UPLOAD - ALIZE GROENEWALD 7910160088088	lows		
13	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name AMPLATS MANAGEMENT SERVICES First Previous Next Last Go to Page 1 Select Cancel The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will section 6.	ORGANISATION ID         organisation Trade Name         AMPLATS MANAGEMENT SERVICES         Page 1 of 1    Lassor File button and fol save the upload by clicking on the Save button.  TION LETTER UPLOAD - ALIZE GROENEWALD 7910160088088	lows		
13	Organisation Legal Name         Organisation Trade Name         SDL Number         Search         Organisation Legal Name         AMPLATS MANAGEMENT SERVICES         Eirst       Previous         Next       Last         Go to Page       1         Select       Cancel	Organisation ID         organisation Trade Name       SDL Number         AMPLATS MANAGEMENT SERVICES       L350733343         Page 1 of 1       Letter by clicking on the Choose File button and folsave the upload by clicking on the Save button.         TION LETTER UPLOAD - ALIZE GROENEWALD 7910160088088         AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES	lows		
13	Organisation Legal Name         Organisation Trade Name         SDL Number         Search         Organisation Legal Name         AMPLATS MANAGEMENT SERVICES         First         Previous         Next         Last         Go to Page         Select         Cancel    The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will section 6. The SDF will section 6. The SDF will section 10. The SDF will sectin 10. The SDF will section 10. The SDF will sec	ORGANISATION ID         Organisation Trade Name         SDL Number         AMPLATS MANAGEMENT SERVICES         Page 1 of 1         Letter by clicking on the Choose File button and fol save the upload by clicking on the Save button.         TON LETTER UPLOAD - ALIZE GROENEWALD 7910160088088         AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES AMPLATS MANAGEMENT SER	lows		
13	Organisation Legal Name         Organisation Trade Name         SDL Number         Search         Organisation Legal Name         AMPLATS MANAGEMENT SERVICES         Eirst         Previous         Next         Last         Go to Page 1         Select         Cancel	ORGANISATION ID         organisation Trade Name         SDL Number         AMPLATS MANAGEMENT SERVICES         L350733343         Page 1 of 1         Letter by clicking on the Choose File button and folseave the upload by clicking on the Save button.         TION LETTER UPLOAD - ALIZE GROENEWALD 7910160088088         AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES AMPLATS MANAGEMENT SERVICES AMPL	lows		
13	Organisation Legal Name         Organisation Trade Name         SDL Number         Search         Organisation Legal Name         AMPLATS MANAGEMENT SERVICES         First         Previous         Next         Last         Go to Page 1         Select         Cancel    The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will section 6. The SDF will section for the sec	Organisation ID         Organisation Trade Name         AMPLATS MANAGEMENT SERVICES         Page 1 of 1         Letter by clicking on the Choose File button and fol save the upload by clicking on the Save button.         TON LETTER UPLOAD - ALIZE GROENEWALD 7910160088088         AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES         AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES SERVIC	lows		
13	Organisation Legal Name Organisation Trade Name SDL Number Search Organisation Legal Name <u>AMPLATS MANAGEMENT SERVICES</u> First Previous Next Last Go to Page 1 Select Cancel The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will sector 18 in section 18 in Sect	ORGANISATION ID         Organisation Trade Name         SDL Number         AMPLATS MANAGEMENT SERVICES         L350733343         Page 1 of 1         Letter by clicking on the Choose File button and folsave the upload by clicking on the Save button.         TON LETTER UPLOAD - ALIZE GROENEWALD 7910160088088	lows		
13	Organisation Legal Name         Organisation Trade Name         SDL Number         Search         Organisation Legal Name         AMPLATS MANAGEMENT SERVICES         First         Previous         Next         Last         Go to Page 1         Select         Cancel    The SDF then uploads the Verification steps 16 – 18 in section 6. The SDF will section 6. The SDF will section 1. The SDF will sectin 1. The SDF will section 1. The SDF will sect	ORGANISATION ID         organisation Trade Name         SDL Number         AMPLATS MANAGEMENT SERVICES         Labor 33343         Page 1 of 1         Letter by clicking on the Choose File button and fol save the upload by clicking on the Save button.         TION LETTER UPLOAD - ALIZE GROENEWALD 7910160088088         AMPLATS MANAGEMENT SERVICES-AMPLATS MANAGEMENT SERVICES AMPLATS MANAGEMENT SERVICES AMP	lows		

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# 5 WSP/ATR Offline Application Functionality

This section will guide the SDF in completing the Workplace Skills Plan (WSP) and Annual Training Report (ATR) with the use of the MQA WSP/ATR Offline Application.

**PLEASE NOTE:** Although the financial year is selected for the submission of the WSP/ATR, the reporting period for the report and plan are as follows:

- Annual Training Report (ATR): 01 January 2014 31 December 2014
  - Workplace Skills Plan (WSP): 01 January 2015 31 December 2015

#### 5.1 Installation of the MQA WSP/ATR Offline Application

•

In order for the SDF to submit the WSP/ATR by the deadline of 30 April 2015, the SDF is required to implement the MQA Offline Application. The following steps must be followed in order to successfully install the Offline Application

Step	Action / Screenshot	
1	The SDF will receive 2 files i. MQAWSPATROffline.zip ii. MQA_WSP-ATR 2015.xlsm	
2	Create a <b>MQA Offline Application</b> folder on the computer deskter Offline Application) and <b>SAVE BOTH</b> files in this folder.	op (C:\Users\sdf\Desktop\MQA
	MQA Offline Application > + 4	earch MQA Offline Application
	Organize  Include in library  Share with  Burn New folder	III 🔹 🔟 🔞
	A Favorites	Date modified Type
	Desktop	10/02/2015 05:35 Microsoft
	Downloads MQAWSPATROffline.zip	06/02/2015 11:16 WinRAR Z
3	Now, extract the contents of the <b>MQAWSPATROffline.zip</b> file in t this file, and select the <b>Extract to MQAWSPATROffline</b> \ option.	he same folder – right click on

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Sten	Action / Screenshot				
otep		Name	~	Date modified	Туре
			ATR 2015 Im test view	10/02/2015 05:25	Microsoft
		MQAWSPA	TROffline.zip	06/02/2015 11:16	WinRAR Z
		0	pen		
		🦉 E	tract files		
			tract Here		
				2.	
			an with OfficeScan		
		0	pen with	•	
		S	Dare with		
		R	estore previous versions		
		Si	end to		
		c	ut		
		c	ору		
		c	reate shortcut		
		D	elete		
		R	ename		
		p	operties		
		< [	III		•
4	This will create a <b>MQ</b>	WSPATROff	ine folder in the	e MQA Offlin	e Application folder.
	📕 🕨 MQA	Offline Application 🕨		👻 🍫 Search MQ	2A Offline Application 🔎
	- Se o	nen 💌 Share with	<ul> <li>Burn New fol</li> </ul>	lder	
		pen - Judie with	× 5000 NC00100	iuci	
	rites	Name		Dat	e modified Type
	sktop		QAWSPATROffline	13/	02/2015 02:52 File folder
	wnloads	Di M	QA_WSP-ATR 2015 Im tes	st.xlsm 10/	02/2015 05:35 Microsoft
	cent Places		QAWSPATROffline.zip	06/	02/2015 11:16 WinRAR Z
5	Access this folder and	double click o	n the setup.ex	<b>e</b> file.	
		. • MQAWSPATROff	ine 🕨 🔹 😽	Search MQAWSPA1	ROffline S
		Chara with an	Duna Maufaldan	g	- 51 0
		Snare with 👻	burn inew folder	8==	·
		Name		Date modifie	d Type
		Application Fi	les	06/02/2015 0	8:36 File fold
			Offline.application	06/02/2015 0	8:36 Applicat
		( setup.exe		06/02/2015 0	8:36 Applicat
6	Click Run on the wind	ow to confirm	the action.		
		Open File - See	urity Warning		23
		The publish run this sof	er could not be verified. tware?	Are you sure you wan	tto
			Name:fline Application\/	MQAWSPATROffline\setu	up.exe
		Pu	blisher: Unknown Publisher	r -	
			From: C:\Users\alizeo\Desi	ktop\MQA Offline Applic	atio
				Run Canc	el
		Always as	k before opening this file		
		This nub	file does not have a valid digit isher. You should only run soft	al signature that verifies its ware from publishers you to	ust.
		Hov	v can I decide what software to	<u>) run?</u>	
		<u></u>			

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Step	Action / Screenshot
7	The installer requires the SDF to Accept the terms in order to continue with the installation of the first component needed of the Offline Application
	MICROSOFT SOFTWARE SUPPLEMENTAL LICENSE TERMS  INET FRAMEWORK 4.5 FOR MICROSOFT WINDOWS OPERATING SYSTEM AND ASSOCIATED LANGUAGE PACKS  Microsoft Corporation (or based on where you live, one of its affiliates) licenses this supplement to you. If you are licensed to use Microsoft Windows operating system software (the Necessary Control of the pending License Agreement?  If you choose Dont Accept, install will close. To install you must accept this agreement.  Accept Dont Accept Dont Accept
8	The installer opens the MQAWSPATROffline Setup progress bar to indicate the progress of installing the .NET framework component.
9	DEPENDING on the User Account Control settings on your computer Windows will open a window confirming the installation of this component – click YES to continue.
10	
10a	Wait for this installation to complete.

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Step	Action / Screenshot
	MQAWSPATROffline Setup
	Installing Microsoft .NET Framework 4.5 (x86 and x64) Cancel
10b	NOTE: On some computers the installer will request for a computer restart or reboot
	MQAWSPATROffline Setup
	Setup must reboot before proceeding.
	Choose 'Yes' to reboot now or 'No' to manually reboot later.
	Yes No
11	Click Install on the next window that opens
	Application Install - Security Warning         Publisher cannot be verified.         Are you sure you want to install this application?
	Name:         MQAWSPATROffline         From (Hover over the string below to see the full domain):         C:\Users\alizeg\Desktop\MQA Offline Application\MQAWSPATROffline         Publisher:         Unknown Publisher         While applications from the Internet can be useful, they can potentially harm your computer. If you do not trust the source, do not install this software. More Information
12	The Offline Application window will open, ready for the SDF to logon with the current Username, Password and SDL Number
	Login SDF Login User name Password SDL Number Login Login
40	The application is also evolution on the Windows start up many should the ODE service to as
13	The application is also available on the Windows start-up menu should the SDF require to go back at anytime.

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#### Step Action / Screenshot

420	aleky Notes	5
्रि २	ync 2013	
2	Aicrosoft Excel 2010	•
P 🔄 F	PowerPoint 2013	
	MQAWSPATROffline	
	II Programs	
Searc	ch programs and files 👂	
	0 6 0	
		<b>—</b>

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#### 5.2 Use the MQA WSP/ATR Offline Excel Template

The information for the WSP/ATR Offline Application must be populated in the Excel template, in order to import it into the Offline Application and send it -to the Indicium system. This section discusses the different forms, fields and functionality.

PLEASE NOTE: You do not need to be online or connected to the internet to complete these forms

#### 5.2.1 Biodata and ATR

The following information is required to be completed on the Biodata and ATR form

#### 5.2.1.1 Fields

The following fields need to be populated on the Biodata and ATR worksheet. Please note the following:

- Field Type Indicates the type of field / what is allowed to be used in that field.
- Compulsory This will indicated whether you are required to complete this field or not. Y Yes, N
   No

#	Field Name	Field Type	Compulsory?
1	ID No. / Passport No	Alphanumeric Field	Y
2	Industry No	Alphanumeric Field	Ν
3	Surname	Text Field	Y
4	Name	Text Field	Y
5	Year of Birth	Lookup Field	Y
6	Gender	Lookup Field	Y
7	Race	Lookup Field	Y
8	Disabled?	Lookup Field	Y
9	SA Citizen? Lookup Field		Y
10	Province	vince Lookup Field	
11	Municipality	Lookup Field	
12	Highest Qualification Type	Lookup Field	
13	Employment Status Lookup Field		Y
14	Occupational Levels Lookup Field		Y
15	Job Title Free text (80characters)		Y
16	OFO Occupation Code	Lookup Field	Y
17	OFO Specialisation	Lookup Field	
18	OFO Occupation	Lookup Field	Y
19	Qualification / Learning Programme Type	Lookup Field	Ν
20	Specify if selected Skills Programme, Learnership or a NQF 5-10 Learning in previous column	Lookup Field	Ν
21	Achievement Status	Lookup Field	Ν
22	Year Enrolled / Finished	Lookup Field	Ν

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*5.2.1.2 Functionality* The following functionalities are on the page for Biodata and ATR worksheet.

Step	Functionality			
1	All fields indicated as a <b>Lookup</b> field, are fields with a lookup with specific values to use. The			
	SDF cannot change these, or use values other than what is in the list of lookup values.			
2	The <b>OFO Occupation Code</b> field has a built in search functionality. When you click in this field, a			
	page will open that looks as follows (please see below):			
	Search for an Occupation			
	Please enter search criteria for occupation: Please dick on Occupation for more information:			
	111202 General Manager Public Service			
	11202 Labour Inspectorate Manager 111203 General Manager Local Authority			
	Search Select Occupation 111203 Local Autonoty Manager			
	111007 Senior Government Manager			
	OFO Submajor Group			
	OFO Minor Group			
	OFO Unit Group			
	OFO Occupation			
	The SDF can search for the occupation by adding search criteria and clicking on the Search			
	button.			
	Please enter search criteria for occupation:			
	Search Select Occupation			
	OR select an occupation from the list for more information			
	Please click on Occupation for more information:			
	111202 General Manager Public Service			
	111202 Labour Inspectorate Manager			
	111203 Local Authority Manager			
	111203 Municipal Manager 111207 Senior Government Manager			
	121101 Account Systems Manager			

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	1 MANAGERS		
	Managers plan, direct, coordinate and evaluate the overall activities of enterprises, governments and other organizations, or of organizational units within t		
	OFO Submajor Group		
	11 Chief Executives, Senior Officials and Legislators		
	Chief executives, senior officials and legislators formulate and review the policies and plan, direct coordinate and evaluate the overall activities of enterprise		
	OFO Minor Group		
	111 Legislators and Senior Officials		
	Legislators and senior officials determine, formulate, advise on and direct the implementation of policies of national, state, regional or local governments or		
	OFO Unit Group		
	1112 Senior Government Officials		
	Senior government officials advise governments on policy matters, oversee the interpretation and implementation of government policies and legislation by		
	OFO Occupation		
	111203 Local Authority Manager		
	Plans, organises, directs, controls, reviews and oversees the interpretation and implementation of local government policies and legislation.		
	Occupation Tasks		
	Advising networks state; regulated or government budgets, laws and regulations, including amendments Coordinating activities with other senior government managers and officials Ensuring appropriate systems and procedures are developed and implemented to provide budgetary control Establishing objectives for government departments or agencies in accordance with government legislation and policy Formulating or approving and evaluating programs and procedures for the implementation of government polices in conjunction or consultation with governm Making presentations to legislative and other government committees regarding policies programs or budgets Overseeing the interpretation and implementation of government policies and legislation by government departments and agencies Recommending, reviewing, evaluating and approving documents, briefs and reports submitted by middle managers and senior staff members		
The SI	DF will click on the <b>Select Occupation</b> button to select the occupation just viewed		

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#### 5.2.2 Form 2: WSP

The following information needs to be completed on the WSP form.

5.2.2.1 Fields

The following fields needs to be populated on the WSP worksheet. Please note the following:

- Field Type Indicates the type of field / what is allowed to be used in that field.
- Compulsory This will indicated whether you are required to complete this field or not. Y Yes, N
   No

#	Field Name	Field Type	Compulsory?
1	Qualification / Learning Programme Type	Lookup Field	Y
2	Specify if selected <i>Skills Programme, Short Course, Other, Learnership</i> or <i>NQF 5 -10</i> in previous column.	Lookup Field	Y
3	Managers	Numerical Field	Y
4	Professionals	Numerical Field	Y
5	Technicians and Associate Professionals	Numerical Field	Y
6	Clerical Support Workers	Numerical Field	Y
7	Service and Sales Workers	Numerical Field	Y
8	Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	ricultural, Forestry, Fishery, Craft and Related Numerical Field orkers	
9	Plant and Machine Operators and Assemblers	Numerical Field	Y
10	Elementary Occupations	Numerical Field	Y
11	Learners	Numerical Field	Y
12	Total training planned	Sum of numeric values captured in the row	Y

#### 5.2.2.2 Functionality

The following functionalities are on the page for WSP worksheet

Step	Functionality
1	All fields indicated as a <b>Lookup</b> field, are fields with a lookup that have specific values to be use.
	The SDF cannot change these, or use values other than what is in the list of lookup values.

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#### 5.2.3 Form 3: Scarce Skills

The following information needs to be completed on the Scarce Skills form

5.2.3.1 Fields

The following fields needs to be populated on the scarce skills worksheet. Please note the following:

- Field Type Indicates the type of field as well as what is allowed to be used in that field.
- Compulsory This will indicated whether you are required to complete this field or not. Y Yes, N
   No

#	Field Name	Field Type	Compulsory?
2	Occupation and Specialisation Title	Lookup Field	Y
3	Occupation Code (6 digit code)	Auto populate Field	Y
4	Reason for Occupation being Scarce	Lookup Field	Y
5	Hard to fill vacancies (number) that you considered scarce during 2014?	Numerical field	Y
6	Add comments regarding the scarcity, i.e. which tasks/outputs that are <u>critical</u> for the occupation are not being met or performed by employees?	Free Text	Y
7	What type of learning programmes are you planning to address this occupational scarcity?	Lookup Field	Y
8	NQF Level	Lookup Field	Y
9	If you are planning on importing this skill from outside South Africa, please state number of people?	Numerical Field	Y

#### 5.2.3.2 Functionality

The following functionalities are on the page for scarce skills worksheet

Step	Functionality
1	All fields indicated as a Lookup field are fields with a lookup with specific values to use. The SDF
	cannot change these, or use other values than what is in the list of lookup values.
2	The Occupation Code field will auto populate based on the value selected in the Occupation
	and Specialisation Title.

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#### 5.2.4 From 4: Non-Employees / Community

The following information is required to be completed on the Non-Employees or Community form

#### 5.2.4.1 Fields

The following fields needs to be populated on the Non-Employees or Community worksheet. Please note the following:

- Field Type Indicates the type of field as well as what is allowed to be used in that field.
- Compulsory This will indicate whether you are required to complete this field or not. Y Yes, N
   No

1	Qualification / Learning Programme Type	Fixed Value	
4	Target Beneficiaries - Completed	Lookup Field	Y
5	Total	Free Text; Numerical field	Y
6	Comments on Programmes Completed	Free Text Field	Y
8	Target Beneficiaries - Planned	Lookup Field	Y
9	Total	Free Text; Numerical field	Y
10	Comments on Programmes Planned	Free Text Field	Y

#### 5.2.4.2 Functionality

The following functionalities are on the page for Non-Employees / Community worksheet

Step	Functionality				
1	All fields indicated as a <b>Lookup</b> field, are fields with a lookup with specific values to use. The SDF cannot change these, or use values other than what is in the list of lookup values.				
2	The Occupation Code field will auto populate based on the value selected in the Occupation and Specialisation Title.				
3 NOTE In the Qualification / Learning Programme Type field has subsections					
	#		Comment		
	1	ABET values	These are fixed, and cannot be changed		
	2	Disciplines in which bursaries are being offered	For this section, the SDF will select the discipline from a lookup value field		
	3	Other Community Programmes(Specify)	For this section, the SDF will select the discipline from a lookup value field		
		· · · · · · · · · · · · · · · · · · ·			

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#### 5.2.5 Form 5: Contractors

The following information is required to be completed on the contractors form.

5.2.5.1 Fields

The following fields need to be populated on the contractor's worksheet. Please note the following:

- Field Type Indicates the type of field as well as what is allowed to be used in that field.
- Compulsory This will indicate whether you are required to complete this field or not. Y Yes, N No

#	Field Name	Field Type	Compulsory?
1	Qualification / Learning Programme Type	Lookup Field	Y
2	Specify if selected skills Programme, Short Course, Other, Learnership or NQF 5 -10 in previous column.	Lookup Field	Y
3	Managers	Numerical Field	Y
4	Professionals	Numerical Field	Y
5	Technicians and Associate Professionals	Numerical Field	Y
6	Clerical Support Workers	Numerical Field	Y
7	Service and Sales Workers	Numerical Field	Y
8	Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	Numerical Field	Y
9	Plant and Machine Operators and Assemblers	Numerical Field	Y
10	Elementary Occupations	Numerical Field	Y
11	Learners	Numerical Field	Y
12	Total Trained	Calculation Field	Y
13	Managers	Numerical Field	Y
14	Professionals	Numerical Field	Y
15	Technicians and Associate Professionals	Numerical Field	Y
16	Clerical Support Workers	Numerical Field	Y
17	Service and Sales Workers	Numerical Field	Y
18	Skilled Agricultural, Forestry, Fishery, Craft and Related Trades Workers	Numerical Field	Y
19	Plant and Machine Operators and Assemblers	Numerical Field	Y
20	Elementary Occupations	Numerical Field	Υ
21	Learners	Numerical Field	Y
22	Total Training Planned	Calculation Field	Y

#### 5.2.5.2 Functionality

The following functionalities are on the page for Contractors worksheet

Step	Functionality
1	All fields indicated as a Lookup field, are fields with a lookup with specific values to use. The
	SDF cannot change these, or use values other than what is in the list of lookup values.

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#### 5.2.6 Form 6: Impact Assessment

The following information is required to be completed on the impact assessment form.

5.2.6.1 Fields

The following fields need to be populated on the impact assessment worksheet. Please note the following:

- Field Type Indicates the type of field as well as what is allowed to be used in that field.
- Compulsory This will indicate whether you are required to complete this field or not. Y Yes, N
   No

#	Field Name	Field Type	Compulsory?
1	How many training interventions did you plan in the last reporting year, as recorded in your WSP 2014?	Numeric Field	Y
2	Total Interventions conducted as recorded in your ATR for the period 2014	Populated Field	Y
3	Deviation %	Numeric Field	Y
4	Please state reason for deviation if more that 40 %( if alignment of WSP vs. ATR is less than $60\%$ )	Free Text Field	Y
5	Briefly explain how you measure the impact of training in your organisation	Free Text Field	Y
6	Comment on the impact training has had in your organization over the last year	Free Text Field	Y

#### 5.2.6.2 Functionality

The following functionalities are on the page for Impact Assessment worksheet

Step	Functionality
1	All fields indicated as a Lookup field, are fields with a lookup with specific values to use. The
	SDF cannot change these, or use values other than what is in the list of lookup values.

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#### 5.2.7 Form 7: Finance Sheet

The following information is required to be completed on the finance sheet form.

5.2.7.1 Fields

The following fields need to be populated on the finance sheet worksheet. Please note the following:

- Field Type Indicates the type of field as well as what is allowed to be used in that field.
- Compulsory This will indicate whether you are required to complete this field or not. Y Yes, N
   No

#	Field Name	Field Type	Compulsory?
1	Total actual payroll for the year 01 Jan 2015 - 31 Dec 2016	Currency Field	Y
2	Total actual skills development spend for the year 01 Jan 2014 - 31 Dec 2014	Currency Field	Y
3	% of payroll spent on skills development	Numeric Field	Y
4	Total projected payroll for the year 01 Jan 2015 - 31 Dec 2015	Free Text Field	Y
5	Briefly explain how you measure the Impact of training in your organisation	Free Text Field	Y
6	Projected % of payroll to be spent on skills development	Free Text Field	Y

#### 5.2.7.2 Functionality

The following functionalities are on the page for Finance Sheet worksheet

Step	Functionality
1	All fields indicated as a Lookup field, are fields with a lookup with specific values to use. The
	SDF cannot change these, or use values other than what is in the list of lookup values.

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### 5.3 Use the MQA WSP/ATR Offline Application

The SDF must use the Excel template in conjunction with the WSP/ATR Offline Application to complete the WSP/ATR forms for the submission due on 30 April 2014. Please note the following:

- Be online or connect to the internet first **before** logging on to the Offline Application
- The Excel templates can at any stage be imported into the WSP/ATR Offline Application
- Use an Excel template per company that needs to be submitted
- The data can be sent to Indicium at **any stage**, but **please note** that only the records without errors will be sent to Indicium
- The data can also be re-sent to Indicium at any stage, but please **note** that the set of information sent to Indium must **include** the **original** data. Indicium will overwrite the previous upload.

Step	Action / Screenshot
1	Open the excel template, and click on the <b>Enable Content</b> button. This will enable the excel spreadsheet, rules and built in formulas, allowing the SDF to capture the information.
	<b>SECURITY WARNING</b> Some active content has been disabled. Click for more details. Enable Content
2	The SDF is required to complete the excel template for the following forms as per section 5.2 above: Biodata & ATR WSP Scarce Skills Non-Employees-Community Contractors Impact Assessment Finance Sheet NOTE: The forms in this excel template contain formulas and macros. The SDF CANNOT
	change anything set in the forms, this includes renaming of columns, re-ordering columns, adding / removing of columns. The template must be used <b>AS-IS</b>
3	Once the SDF is ready, the template can be uploaded / imported into the Offline Application in order to check for errors and is then uploaded onto Indicium.
4	To continue with step 3, the SDF must to logon to the MQA Offline Application by opening the application from the Windows start-up menu.
	Sucky Notes
	L 2013
	Microsoft Excel 2010
	P PowerPoint 2013
	MQAWSPATROffline
	All Programs
	Search programs and files

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Step	Action / Screenshot		
5	The logon window to the Username, Password and	Login SDF Login User name Password SDL Number	cation will open and the SDF will need to add their the company that they are busy uploading.
6	The application will open w	hen the SDF c	clicks the <b>Login</b> button.

port Data	
stata & ATR WSP Scarce Skills Non Employees Contractors Impact Assessment Finance Sheet	

Step	Action / Screenshot
7	The data captured in the excel template must now be imported into the application. To do this, click on the <b>Data</b> menu name and select <b>Import</b> from the options.
	File Data Bioc Send to Indicium Nor
8	Export Error Report
0	Select the file from the four the four and the file for the four the fo
9	The data will be uploaded into the template, the progress bar will show progress of the import.

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Step	Action / Screenshot				
	Data Import in progress, please wait 100%				
	The application will generate a error report errors occur.				
	Oops! The template has errors. The system has generated an error report for you. Fix all the errors on the error report and re-upload.				
	ОК				
	To download the error report click on the <b>Data</b> menu option and select <b>Export Error Report</b> .				
	P Import				
	File Date				
	Biod				
	Send to Indicium				
	Export Error Report				
40	The errors will also be indicated on the form itself for example in this ease on the Nen Employees				
10	form				
	• Import				
	File Data				
	Biodata & ATR   WSP   Scarce Skills   Non Employees   Contractors   Impact Assessment   Finance Sheet				
	ErrorDescription ProgrammeType TargetBeneficiaries TotalDone CommentsProgrammeTargetBenefic				
	Target Beneficiaries Done does not exist;T Pre-ABET 0				
	Target Beneficiaries Done does not exist;T ABET 1 0				
	Target Beneficiaries Done does not exist; T ABET 3 0				
	Target Beneficiaries Done does not exist;T ABET 4 0				
	Disciplines in whi 0				
	Other Community 0				
	These errors can be corrected on the excel template and imported again				
11	To send the information to Indicium select the <b>Data</b> menu and the <b>Send to Indicium</b> ontion				
	To send the information to indicidin select the Data mend and the Dend to indicidin option.				
	Import				
	nd mubore				
	File Data				
	Import				
	Biod				
	Send to Indicium				
	Export Error Report				
	A progress bar will indicate the progress of sending the information to Indicium.				
	Data Submission in progress, please wait 2%				
12	A results window will show the statstics of the information being uploaded.				

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Step	Action / Screenshot				
	Send to Indicium Results		and the second second		
	Send to Indicium Results				
	BioData		WSP		
	Records without errors (imported)	1	Records without errors (imported)	2	
	Records with errors (not imported)	0	Records with errors (not imported)	0	
	Scarre Skille		Non Employees		
	Records without errors (imported)	0	Records without errors (imported)	2	
	Records with errors (not imported)	ō	Records with errors (not imported)	6	
	Contractors		Finance		
	Becords without errors (imported)	14	Becards without errors (imported)	6	
	Records with errors (not imported)	0	Records with errors (not imported)	0	
	Impact Assessment				
	Records without errors (imported)	6			
	Records with errors (not imported)	0			
			ОК		
13	The Application will open on the fir	st form ag	gain after the SDF clicks on	the OK button.	
14	To exit the application click on the	File mer	nu and click on the Exit op	tion – doing this	s will require
	the SDF to logon again.			· ·	•
	5 5	F	ile Data		
		/			
			Exit		

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5.4 Access to View data imported through MQA WSP/ATR Offline Application To view the data imported through the MQA WSP/ATR Offline module the SDF will be able to check and review the information imported.

Step	Action / Screenshot
1	The SDF will be granted access to the WSP/ATR information once MQA approves the SDF
	verification Letter.
2	The SDF will receive an e-mail communication confirming the approval once MQA approves the
	verification letter
	50 Matroosberg Road
	Ashlea Gardens
	Pretoria
	0081
	Tel: 0124820301
	Cell: 0845552214
	E-mail: agroenewald@dtss.co.za
	13 February 2015
	Dear Ms Groenewald
	Current status of the organisation: Verification Document approved at MQA
	This letter serves to inform you of the approval of the Verification Document for the above mentioned organisation.
	This entitles you to proceed with the online submission of your Source Data Spreadsheet/s, as well as to generate your WSP-ATR PDF document from the system.
	Yours faithfully,
3	To complete the WSP/ATR online, access Indicium and follow steps 1-7 in section 7.1
4	To validate the Organisation Bank Details the SDF will click on the Organisation Bank Details
	menu option.
	Skills
	Skills >> Organisation >>
	Organisation Details
	Organisation Details
	Organisation Bank Details
	Child Organisations
	Training Committee
	Organisation CFO Details
	Approved 3DI s
	Dormond University
	D'oventent opticides
5	Indicium opens the WSP & ATR forms section on the right panel of the screen:

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Step	Action / Screenshot							
-	C W	SP & ATR For	MS - AMPL	ATS MANA	GEMENT S	ERVICES (L	350733343)	
	View Edit Summary Report			and a second second second	and the production of the local data	and a second		
	vion Loc Commony report							
	Financial Year	▼ Creat	e					
	Skills Year Form T	ype Linked (	Grant Status	Due Date	Status Date	Submission Dat	e	
	01 April 2015 - 31 March 2016 Forms	Yes C	reated	30/04/2015 1	1/02/2015			
	First Previous Next Last G	o to Page 1 P	age 1 of 1					
6	The SDF will select the financial	vear that	relates to	o the sub	omission.	which is	on 30 April 2	2015.
	Click on the View button to open	the set of t	orms the	at must b	e comple	ted.	•	
	WSE	& ATR FOR	AMPI	ATS MAN		T SERVICE	S (1 35073334	3)
	View Edit Summary Report Subr	nit						
	Financial Year	▼ Create					-	
		orease						
	Skills Year Form Type	linked G	rant Status	Due Date	Status Dat	o Submissi	in Date	
	Skins Teal Tomi Type	Clinked O	lant status	. Due Date	- Jatus Dat	e aubitita	on Date	
	01 April 2015 - 31 March 2016 Forms	Yes Cr	ated	30/04/2015	11/02/2015	-		
	First Previous Next Last Go to	Page 1 Pa	ge 1 of 1					
7	Indicium will display the list of for	ms that ne	ed to be	complete	ed.			
	1 9			•				
	MOA Indicium		~				Welcome, Alize - Primary S	DF
			AN ON					
	SEIX Management system	MININ	G QUALIFICATIONS AUTH	ORITY			Switch Pr	onle
	Skills							
	Main Dago	WSF	& ATR Forms					
	Ivian Page	01 April 2	)15 - 31 March 2	2016			sank.	
						-0-	Submit WSP/ATR	
	# Form	Desc	iption			Due Date	Select	
	1. Form 1: BioData & ATR	Form 1	BioData & ATR			30/04/2015	Select	
	3. Form 3: Scarce Skills	Form 3	Scarce Skills			30/04/2015	Select	
	4. Form 4: Non-Employees / Community	Form 4	Non-Employees / Co	mmunity		30/04/2015	Select	
			Contractors			2010412045	[	
	5. Form 5: Contractors	Form 5	. Contractors			30/04/2015	Select	
	5. Form 5: Contractors 6. Form 6: Impact	Form 5 Form 6	: Impact			30/04/2015	Select	
	5.     Form 5: Contractors       6.     Form 6: Impact       7.     Form 7: Finance Sheet	Form 5 Form 6 Form 7	: Impact Finance Sheet			30/04/2015 30/04/2015 30/04/2015	Select Select	
	5. Form 5: Contractors     6. Form 6: Impact     7. Form 7: Finance Sheet	Form 5 Form 6 Form 7	: Impact Finance Sheet			30/04/2015 30/04/2015 30/04/2015	Select Select	
8	5. Form 5: Contractors     6. Form 6: Impact     7. Form 7: Finance Sheet  Click the Select button to open tl	Form 5 Form 6 Form 7	Impact Finance Sheet	e details		30/04/2015 30/04/2015 30/04/2015	Select Select	
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open th	Form 5 Form 6 Form 7	Impact Finance Sheet	e details		30/04/2015 30/04/2015 30/04/2015	Select Select	
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the <b>Select</b> button to open the	Form 5 Form 7 Form 7	Impact Finance Sheet	e details		30/04/2015 30/04/2015 30/04/2015	Select Select Welcome, Alize - Pr	imary SDF
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System	Form 5 Form 8 Form 7	impact Finance Sheet	e details		30/04/2015 30/04/2015 30/04/2015	Select Select Welcome, Alize - Pr	imary SDF
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System	Form 5 Form 7 The form and	impact Finance Sheet d view the Contractions Autor	e details		30/04/2015 30/04/2015 30/04/2015	Select Select Welcome, Alize - Pi	imary SDF Log out
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System Skills	Form 5 Form 7 The form and	contractors impact innance Sheet  d view th  contractors contractors	e details		30/04/2015 30/04/2015 30/04/2015	Select Select Select Welcome, Alize - Pr	imary SDF Log out
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System Skills	Form 5 Form 7 The form and	Contractors     Impact     Finance Sheet     J view th     Contractors     Contractors     Contractors	e details		30/04/2015 30/04/2015 30/04/2015	Select Select Welcome, Alize - Pr	imary SDF Log out
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System Skills Main Page	Form 5 Form 7 Form 7 The form and WSP 01 April 20	Contractors     Impact     I	e details		3004/2015 30004/2015 30004/2015	Select Select Select	imary SDF Log out
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System Skills Main Page	Form 5 Form 7 Form 7 The form and WSP 01 April 20	Contractors     Impact     Finance Sheet     J view th     Contractors     Automatications Automatication     & ATR Forms     15 – 31 March 2	e details		3004/2015 30004/2015 30004/2015	Select Select Welcome, Alize - Pr St	imary SDF Log out ritch Profile
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the Management System Skills Main Page # Form	Form 5 Form 7 Form 7 The form and UNIX C	impact innance Sheet sheet innance Sheet in	e details		3004/2015 30004/2015	Select Select Welcome, Alize - Pr St Submit WSP/ATH	imary SDF Log out itch Profile
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the Management System Skills Main Page 1. Form 1. Form 1: BioData & ATR	Form 5 Form 7 Form 7 Form 7 Form 7 Form 7 Form 12 Form 1:	connactors impact innance Sheet connactors	e details		30/04/2015 30/04/2015 30/04/2015	Select Select Welcome, Alize - Pr Submit WSP/ATH Select Select	imary SDF Log out itch Profile
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System Skills Main Page 1. Form 1. Form 1: BioData & ATR 2. Form 2: WSP	Form 5 Form 7 Form 7 Form 7 Form 7 Form 7 Form 12 Form 12 Form 12 Form 12	Connectors  Conne	e details		30/04/2015 30/04/2015 30/04/2015 Due Date 30/04/2015 30/04/2015	Select Select Welcome, Alize - Pi Submit WSP/ATH Select Select Select	imary SDF Log out itch Profile
8	5. Form 5: Contractors 6. Form 6: Impact 7. Form 7: Finance Sheet Click the Select button to open the MQA Indicium SETA Management System Skills Main Page Form 1. Form 1: BioData & ATR 2. Form 2: WSP 3. Form 3: Scare Skille	Form 5 Form 7 Form 7 Form 7 Form 7 UNER CONTRACTOR Form 1: Form 1: Form 2: Form 2: Form 2:	Connactors  Conna	e details		30/04/2015 30/04/2015 30/04/2015 Due Date 30/04/2015 30/04/2015 30/04/2015	Select Select Select Welcome, Alize - Pr Submit WSP/ATH Select Select Select Select	imary SDF Loa out itch Profile
8	5. Form 5: Contractors     6. Form 6: Impact     7. Form 7: Finance Sheet  Click the Select button to open t  MQA Indicium SETA Management System  Skills  Kain Page  Form  Form 1: BioData & ATR  C. Form 2: WSP C	Form 5 Form 7 Form 7 Form 7 Form 7 Form 7 Form 1 Form 1 Form 1 Form 2 Form 2	Connactors  Conna	e details		30/04/2015 30/04/2015 30/04/2015 30/04/2015 30/04/2015 30/04/2015 30/04/2015	Select Select Select Welcome, Alize - Pr Submit WSP/ATH Select Select Select Select	imary SDF Log out itch Profile
8	5. Form 5: Contractors     6. Form 6: Impact     7. Form 7: Finance Sheet  Click the Select button to open th  MQA Indicium SETA Management System  Skills  Kills  Kills  Form  Permo Form 1: BioData & ATR  Permo Form 2: WSP Form 2: WSP Form 2: WSP Form 3: Genera & Wille  The details that have successfull	Form 5 Form 7 Form 7 Form 7 Form 7 Form 1 Form 1 Form 1 Form 2 Enry 2 Y been sen	Connactors  Conna	e details	De display	30/04/2015 30/04/2015 30/04/2015	Select Select Select Welcome, Alize - Pr Submit WSP/ATH Select Select Select Select Select Select Select Select Select	imary SDF Log out itch Profile

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Step	Action	/ Sc	ree	ns	hot														
		SETA M	2A anagen	nent S	ndi <sub>System</sub>	ciu	m					TIONS AUTHORIT	,					Welcome, Ali	ize - Primary SDF Log out Switch Profile
		Skills																	
		Back to	WSP/AT	R Form	s Menu						Form 1: BioData	& ATR							
		Total Rov	vs: 1																
		ID No	Name	Year Of Birth	Gender	WSP Equity	Disabled	SA Citizen	WSP Municipality	WSP Province	Highest Qual Typ <del>e</del>	WSP Employment Status	WSP Occupational Level	Job Title	OFO Occupation Code	OFO Specialisation	OFO Occupation	Learning Programme 1	Learning Programme Name 1
		AC0012312	13 Kensy	1975	Female	White	Yes	Yes	Ekurhuleni Metropolitan Municipality- EKU	Gauteng	National/Higher Certificate	Permanent	Skilled technical and academically qualified workers, junior management, supervisors, foremen and superintendents	Security		Security Risk Assessment Manager	Directs an organisation's security functions, including physical security and safety of employees, facilities, and assets.	Internship	Mining Engineering
		First F	revious	Next	Last (	Go to Pag	a 1 Page	1 of 1											*

## 6 SUMMARY REPORT

The SDF can download a Summary Report by following the next steps:

Step	Action / Screenshot							
1	report, access Indicium and follow steps 1-7 in section 7.1.							
2	To validate the Organisation Banking Details, the SDF will click on the Organisation Bank Details menu option.							
	Skills							
	Skills >>Organisation >>							
	Organisation Details Organisation Contact Organisation Bank Details Child Organisations Training Committee Organisation CFO Details Approved SDFs WSP & ATR Forms Document Uploads							
3	Indicium opens the WSP & ATR forms section on the right panel of the screen:							
	WSP & ATR FORMS - AMPLATS MANAGEMENT SERVICES (L350733343)							
	View Edit Summary Report							
	Financial Year Create							
	Skills Year Form Type Linked Grant Status Due Date Status Date Submission Date							
	01 April 2015 – 31 March 2016         Forms         Yes         Created         30/04/2015         11/02/2015           First         Previous         Next         Last         Go to Page         1         Page 1 of 1							
4	To validate the Organisation Banking Details, the SDF will click on the Organisation Bank Details menu option.							

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Step	Action / Screenshot							
	View Edit Summer B	WSP &	ATR	Forms - AMPI	LATS MAN	IAGEMENT	SERVICES (L35	0733343)
	Financial Year	eport	▼ Cr	eate				
	Skills Year	Form Type	Linked	Grant Status	Due Date	Status Date	Submission Date	
	01 April 2015 – 31 March 201	5 Forms Y	es	Created	30/04/2015	11/02/2015		
	First Previous Next	Last Go to Pag	ge 1	Page 1 of 1				
5	Indicium opens the rep SDF to create the docu	ort in the bro ment.	wser	for the SDF	to view,	the Crea	te PDF buttor	allows the
				Create PE	)F			

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# 7 Uploading of Documents

The summary report with the signatures authorising the submission must be uploaded by following the next steps:

Sten	Action / Screenshot	
1	Follow steps $1 - 7$ in section	7 1
2	To upload documents click or	the Document Uploads section
2	I o upload documents click or	Skills         Skills >> Organisation >>         Organisation Details         Organisation Contact         Organisation Bank Details         Child Organisations         Training Committee         Organisation CFO Details         Approved SDFs         WSP & ATR Forms         Document Uploads         Client Belationshin Management
3	The SDF must select the type Documentation Type New Document Remove NOTE: It is important that recognize the document and	e of document to upload from the Documentation Type lookup field. Document UPLOADS - AMPLATS MANAGEMENT SERVICES (L350733343) Authorisation page Proof of training completed Copy of cancelled cheque Copy of bank Letter (Stamped by bank) Copy of bank statement Signed WSPATR Report IST Application EMP 201 EMP 103 the SDF selects the correct document type in order for Indicium to apply the correct rules.
4	Once the documentation type is saved by clicking on the Ne Documentation Type New Document Remove	e is selected, the document must be chosen from the location where it <b>DOCUMENT UPLOADS - AMPLATS MANAGEMENT SERVICES (L350733343)</b> Authorisation page
5	This will open a window whe <b>File</b> button to select the docu	re the SDF needs to select the financial year. Click on the <b>Choose</b> ment from its location.

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Step	Action / Screenshot
	SEND DOCUMENT
	Financial Year 01 April 2015 – 31 March 2016 V
	Document Relates to Authorisation page
	Comment
	Document Choose File No file chosen
	Upload Close
	about one
6	Indicium will show a green bar if the document has been successfully uploaded. Click on the
	Upload button to save the document.
	SEND DOCUMENT
	Financial Year 01 April 2015 – 31 March 2016 V
	Document Relates to Authorisation page
	Comment
	Document Choose File Testing docx
	Upload Close
7	Indicium will display the upload:
	Financial Year Comment Original File Name
	01 April 2015 – 31 March 2016 <u>Testing.docx</u>
	First Previous Next Last Go to Page 1 Page 1 of 1

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# 8 WSP/ATR Submission

To submit the WSP/ATR the SDF will follow the next steps:

Step	Action / Screenshot			
1	Follow steps 1 – 7 in section 7.1			
2	To add, edit or remove the <b>Organisation Contact Person Details,</b> the SDF will click on the <b>WSP &amp; ATR Forms</b> menu option.			
	H	ome		
	Skil	ls >>Organisation >>		
	Org Org Ch Tra Org Ap Do Cli	ganisation Details ganisation Contact ganisation Bank Details ild Organisations aining Committee ganisation CFO Details proved SDFs SP & ATR Forms comment Oploads ient Relationship Management		
3	The SDF will select the year that re the <b>Submit</b> button to submit the WS <b>NOTE</b> : The Grant Status will char updated with <b>the</b> date on which the <b>NOTE</b> : <b>Once submitted</b> , it is <u>fina</u>	elates to the submission which is due on 30 April 2015. Click on SP/ATR. nge from <b>Created</b> to <b>Submit.</b> The <b>Submission Date</b> will be <b>Submit button</b> was clicked. <b><u>I</u>. The SDF will not be able to change any information</b> .		
	WSP 8	& ATR Forms - AMPLATS MANAGEMENT SERVICES (L350733343)		
	View Edit Summary Report Submit			
	Financial Year	▼ Create		
	Skills Year Form Type	Linked Grant Status Due Date Status Date Submission Date		
	01 April 2015 - 31 March 2016 Forms	Yes Created 30/04/2015 11/02/2015		
	First Previous Next Last Go to P	age 1 Page 1 of 1		

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# 9 NOTES

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