MQA Indicium

Stakeholders
Training Manual

SDF Registration
WSP/ATR Submission

Name: _____

MQA

MINING QUALIFICATIONS AUTHORITY

TABLE OF CONTENTS

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

2 PROCESS

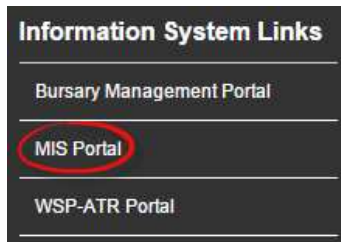Below the SDF Registration Process that will be discussed in this document.

MQA SDF Registration Process

SDF Registration

Navigate to **www.mqa.org.za** → Click on **Stakeholder Login** → **Indicium** Logon page opens → Click on **Register an SDF** → Complete **Application Details**

Check for **system generated e-mail** with **user credentials** ← **Submit** completed details

Password Change

Enter **System Generated** user credentials on Indicium Logon page → **Create a New Password** → **Confirm** New Password

Linking Organisation

Logon to Indicium with **New Password** → Select **Skills** from the Menu → Select **SDF** → Link organisation(s) on **Organisation Details**

Update Organisation

Select **Organisation** from the Menu → Search for organisation linked to SDF → Update Organisation details → "Confirm the organisation details by ticking the box' after update organisation details.

Verification Letter and Scenarios

Select **Organisation** from the Menu → Search for **organisation** linked to **SDF** → Select **WSP & ATR** Forms form the menu → Create 2015 WSP-ATR forms → Select the **Scenario** applicable for the **submission**

Select **Organisation** and Generate **Verification Letter** ← Search for **Organisation** ← Select **Organisation Details** ← Select **SDF** ← Select **Skills** from the Menu

Obtain required signatures → Select V**erification Letter Upload** from Menu and upload the **Verification Letter**

Application and Indicium

Install Application → SDF can logon to the application module once **approved** by MQA → Complete Excel template → **Import** into Application → **Upload** to Indicium

Submit final submission on **Indicium** ← Upload **Signed Authorisation Page** on **Indicium** ← Generate **Summary Reports** for **consultation** and **verifying** information
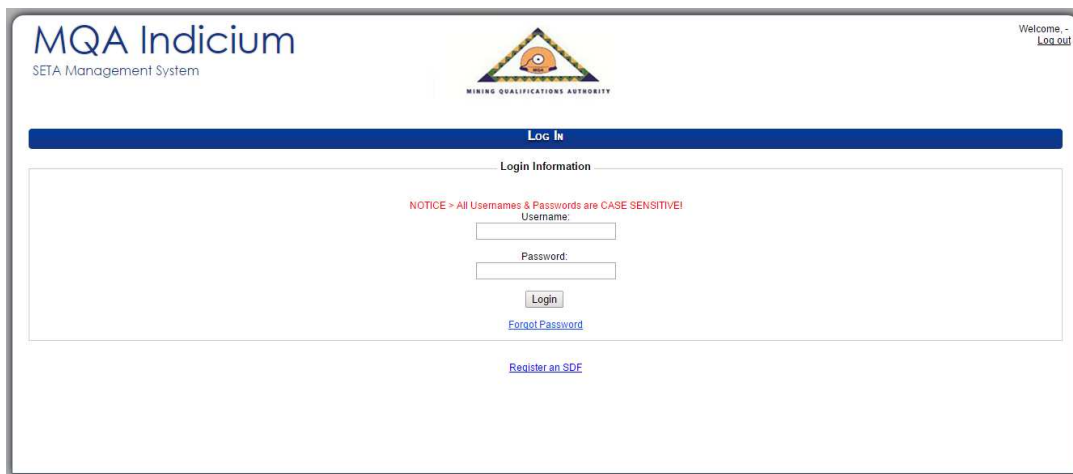
3 INDICIUM ACCESS

3.1 Website

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

Information System Links

Bursary Management Portal

MIS Portal

WSP-ATR Portal

This link will revert to the MQA Indicium logon page

MQA Indicium
SETA Management System

Welcome, -
Log out

MINING QUALIFICATIONS AUTHORITY

LOG IN

Login Information

NOTICE > All Usernames & Passwords are CASE SENSITIVE!

Username:

Password:

Login

Forgot Password

Register an SDF

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 http://indicium.mqa.org.za/WSPATRService/WSPOffline.asmx

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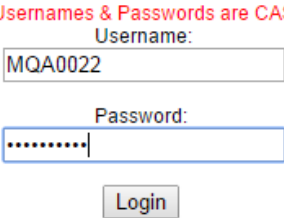
3.2.3 Hardware Requirements

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.
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.
3	Indicium will revert the **Change Password** page for the SDF to update the password to a new password.

Step	Action / Screenshot
	Please note the following rules on Creating of Passwords: | #	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 **symbol** "{*&%$#@
5	The password expires after 30 days, and the SDF will be required to enter a **new** password – each 30 days. | The SDF then clicks on the **Change Password** button to save the password. Indicium will navigate to the logon screen once the password has been successfully changed. Change Password
4	Indicium will send the SDF an e-mail notification upon successful changing of passwords.
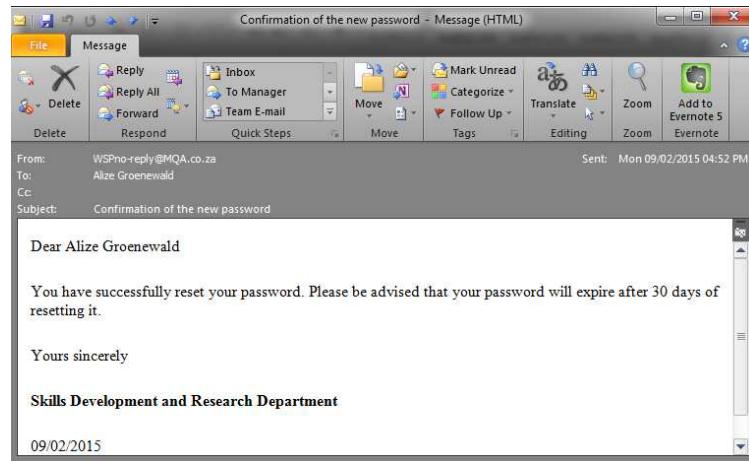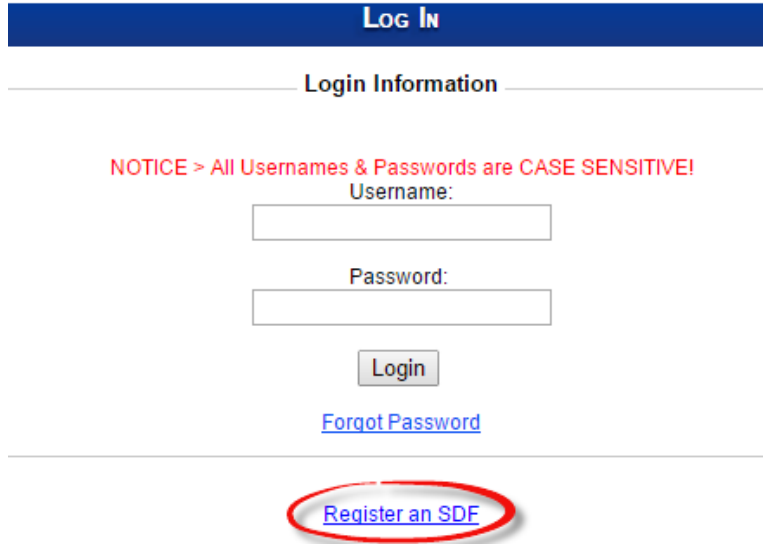
4 SDF Registration

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.
2	The SDF selects the **Register an SDF** option at the bottom of this page.
3	Indicium opens the pop-up Registration window. The SDF has **two** options: i. *Cancel* – click on the **Cancel** button to cancel the registration process and return to the logon screen.

Step	Action / Screenshot
	ii. *Register* – click on the **Register** button to continue with the registration process.
4	Indicium opens the **Applicant Details** form for the SDF to complete.

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 **valid** 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 **not** 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 **not** 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

Step	Action / Screenshot		
	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	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 **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
6	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.
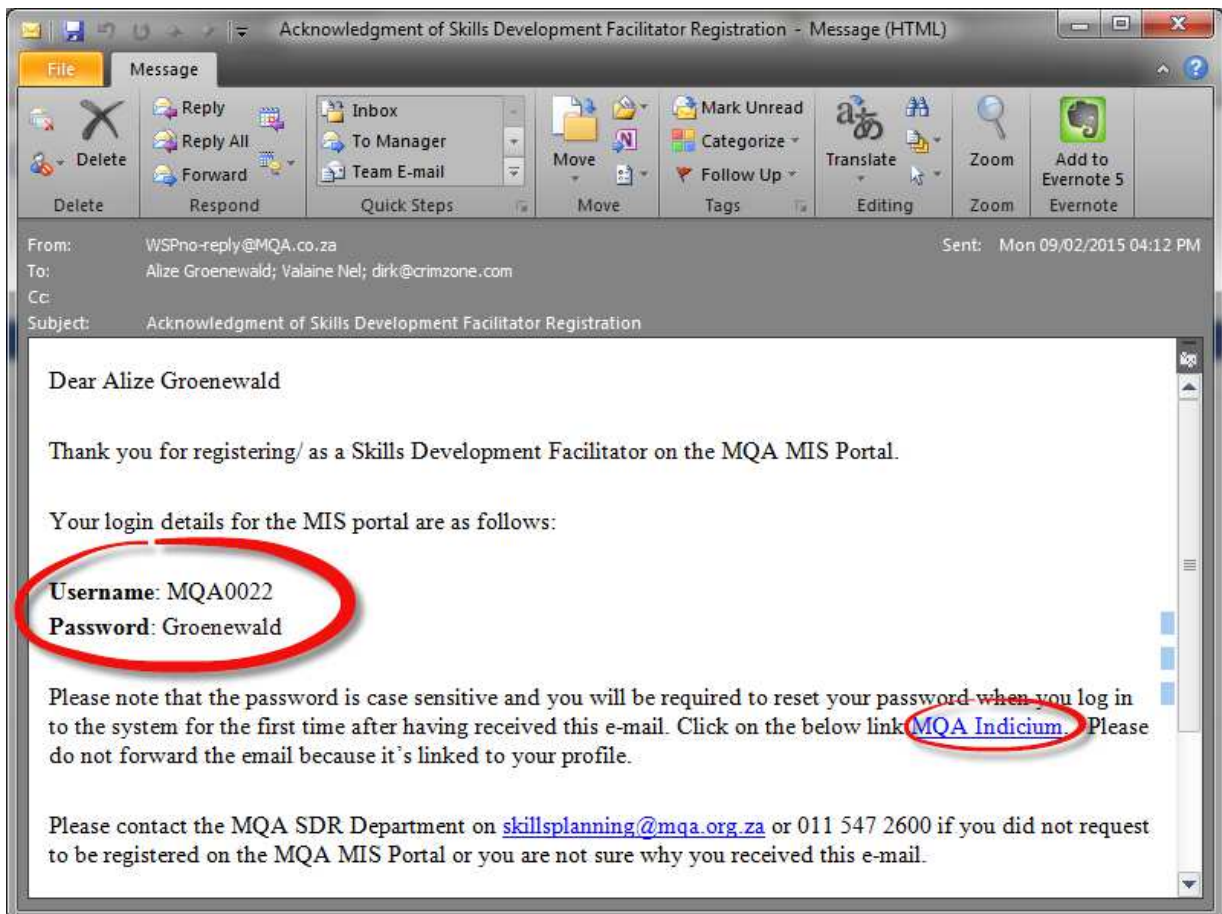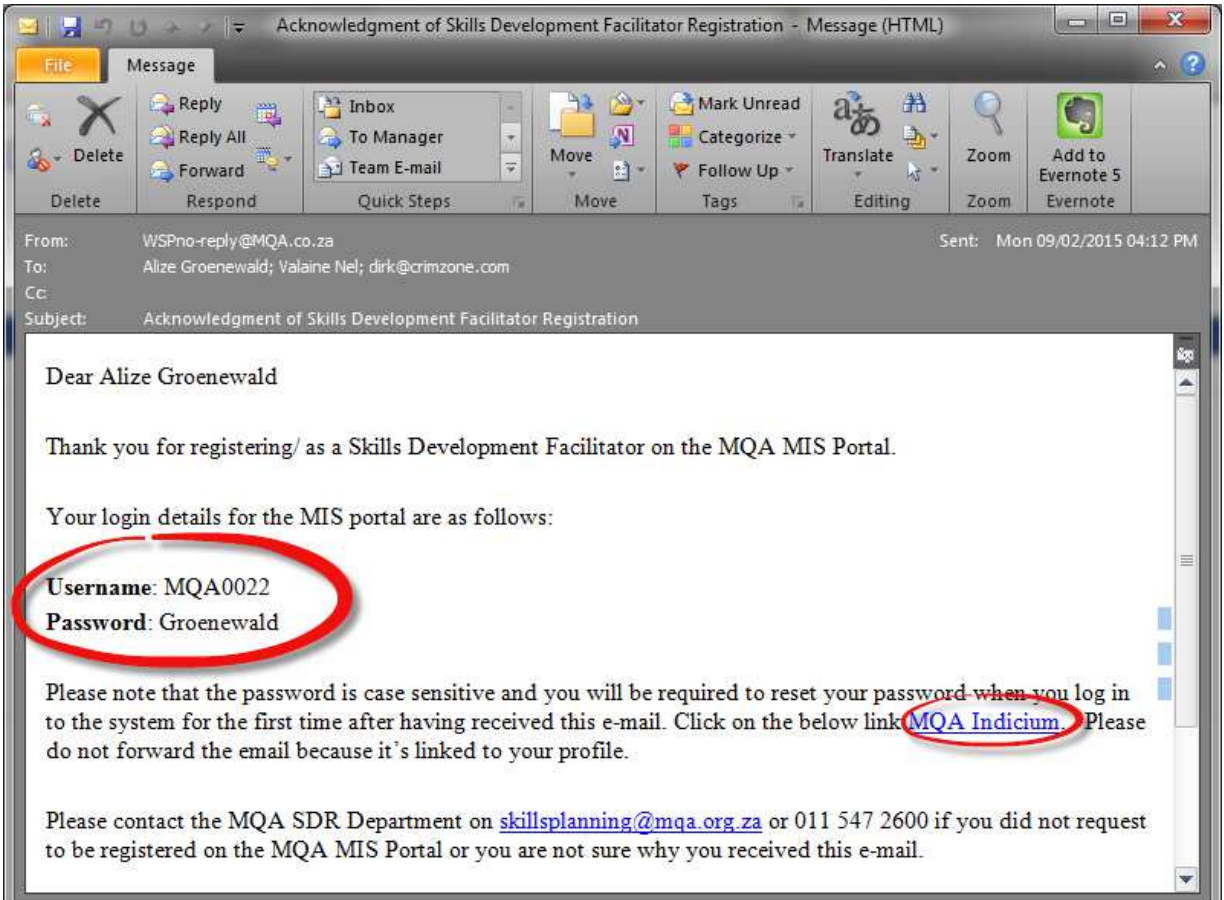
4.1 SDF First Logon

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

Step	Action / Screenshot
1	The SDF navigates to the MQA Indicium Seta Management System page.
2	The SDF enters the username and password that is sent in the **acknowledgement and skills development facilitator** email, received upon the submission of registration.

Step	Action / Screenshot
	Note 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 SDF needs to click on the **Login** button once the **Username** and **Password** is entered.
4	The SDF needs to enter a **NEW** Password, and **CONFIRM** the password. **CHANGE PASSWORD** Your Password has expired please enter new password New Password: Confirm Password: Change Password Back to Login Please note the following rules for creating passwords:

#	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 **symbol** "{*&%$#@
5	The password expires after 30 days, and the SDF will be required to enter a **new** password – each 30 days.

The SDF then clicks on the **Change Password** 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)

From: WSPno-reply@MQA.co.za
To: Alize Groenewald
Cc:
Subject: Confirmation of the new password
Sent: Mon 09/02/2015 04:52 PM

Dear Alize Groenewald

You have successfully reset your password. Please be advised that your password will expire after 30 days of resetting it.

Yours sincerely

Skills Development and Research Department

09/02/2015
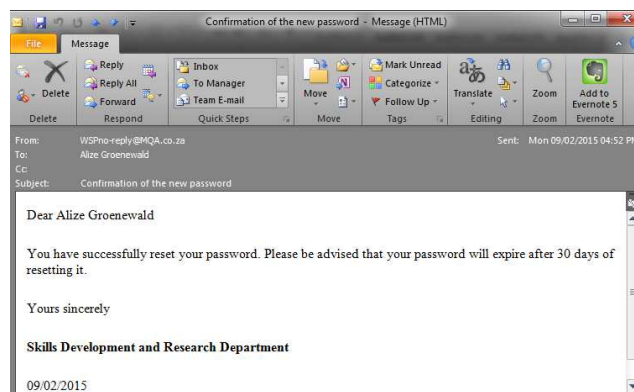
4.2 Register Organisation on SDF Profile

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 **Login.**
2	The SDF enters the generated **Username** and **New Password**, and then proceeds to clicking on the **Login** button.
3	Indicium reverts to the Skills dashboard
4	The SDF clicks on the **Skills** menu option.
5	Indicium opens the page with two options:

Step	Action / Screenshot
	• Organisation • SDF **Note**: 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.
6	The SDF must click on the **SDF** menu option.
7	Search for the SDF 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 **Search** button
8	Indicium will return the SDF details.
9	To access the SDF, select the row and then click on the **Action** button.
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.
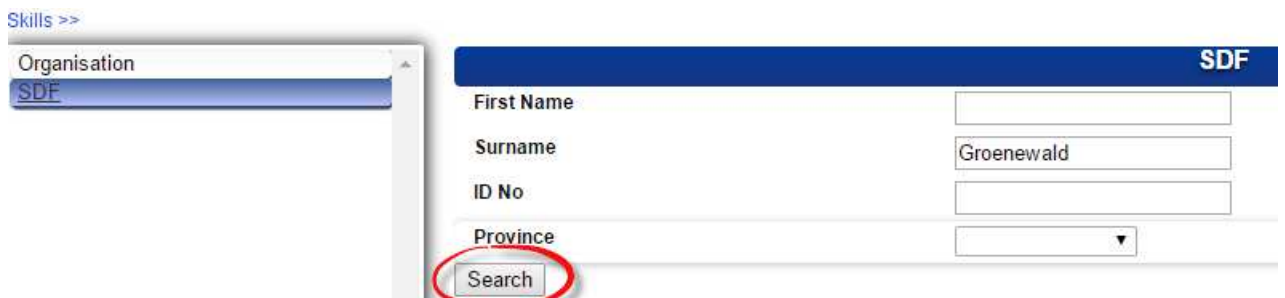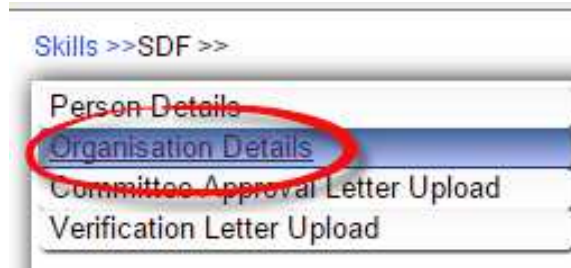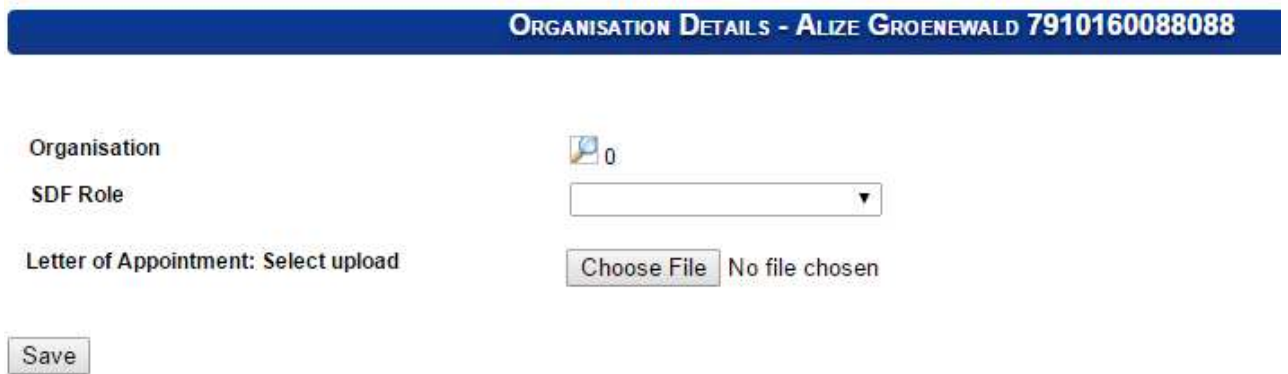
Step	Action / Screenshot
11	The SDF must select the **Organisation Details** option from the menu.
12	Indicium will open a page on the right hand side allowing the SDF to search for the organisations required.
13	The SDF clicks on the magnifying glass to open the **Organisation** search screen. The SDF searches for the Organisation in order to link to this profile by adding the L number of the organisation in the **SDL Number** field and then clicks on the **Search** screen.
14	Indicium returns the results for the criteria used. The SDF will select the organisation (Indicium will highlight the organisation), and then click on the **Select** button.

Step	Action / Screenshot
15	Indicium adds the details of the organisation in the **Organisation** field. The SDF now needs to select the **Role** from the **SDF Role** lookup field.

Please note the following rules for the **SDF Role**:

#	Option	Rule
1	Primary SDF	The **Primary SDF** has **FULL** access in that he/she can view, edit, update, capture, delete on the Organisation where the SDF has **Primary SDF** role access.
2	Secondary SDF	The **Secondary SDF** has **VIEW** access only to the Organisation where the SDF has **Secondary SDF** role access
3	Secondary SDF Capturer	The **Secondary SDF Capturer** has **VIEW** access to the Organisation, **however** will be able to **capture** the **WSP/ATR only** where the SDF has **Secondary SDF Capturer** role to the organisations they are linked to.

| 16 | The SDF needs to upload the **Letter of Intent** by clicking on the **Choose File** button. |

Step	Action / Screenshot
17	The SDF will select the **signed Letter of Intent** from the location where it is saved and clicks on the **Open** button to link it to the Organisation.
18	A successful upload shows a **green** upload line, a **red** line will be displayed if Indicium did not successfully uploaded the letter. The SDF then clicks on the **Save** button to complete the process.
19	Indicium will link the organisation to the SDF, displaying the details as follows:
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.
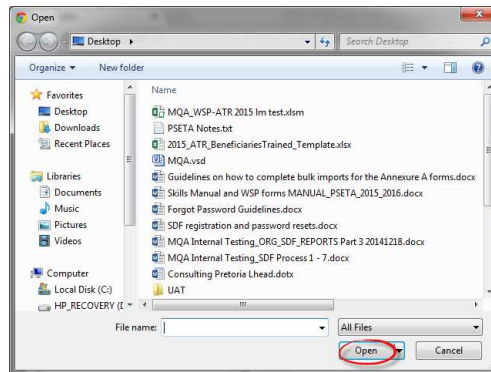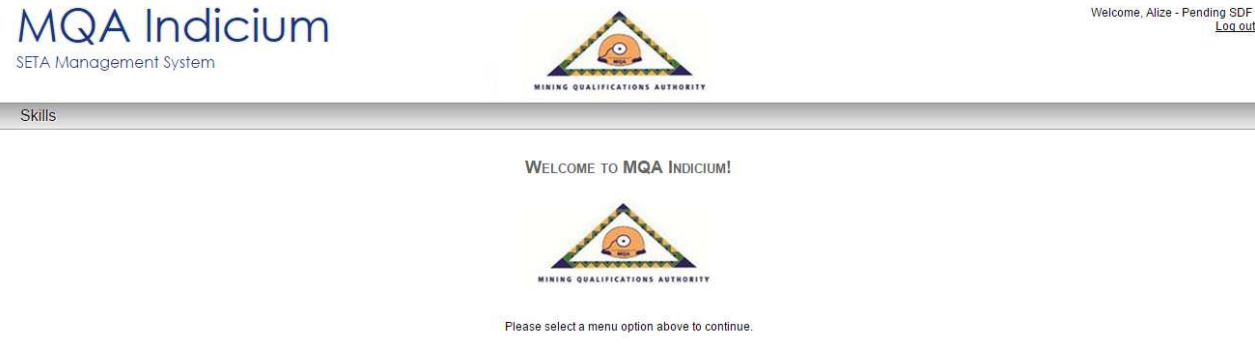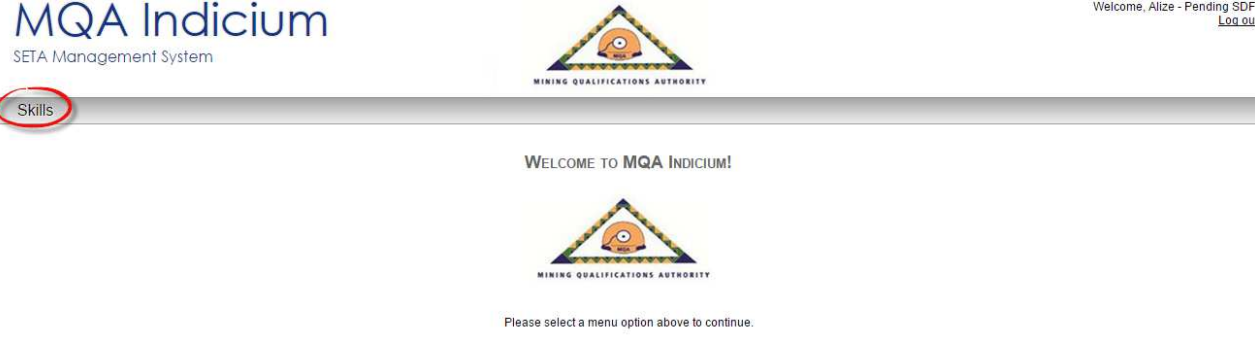
4.3 Update Organisation Profile

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 details and clicks on **Login.**
2	Indicium reverts to the Skills dashboard.
3	The SDF clicks on the **Skills** menu option.
4	The SDF must click on the **Organisation** menu option.

Step	Action / Screenshot
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 **Search** button can simply be clicked
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 criteria.
7	To access the organisation details, select or highlight by clicking on the organisation name and then click on the **Action** button.
8	Indicium opens the organisation profile, on the **Organisation Details** screen.
9	To edit or update the organisation details the SDF will click the **Edit** button for Indicium to enable the fields for editing.

Step	Action / Screenshot
10	The SDF must check / update the Organisation details ensuring that all details are correct. Once the SDF checks this information, the SDF is required to confirm that the details are correct by selecting the tick box called **Confirm Organisation Details** and then clicking on the **Save** button to save the information.

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.
3	To **Create** a new contact, the SDF will click on the **Create** button.
4	Indicium will open the **Create Organisation Contact** screen. The SDF must complete the fields and click on the **Save** button to save the contact captured.
5	Indicium saves the information on the **Organisation Contact** screen.

Step	Action / Screenshot
6	To **Edit** the specific contact details, select the contact from the list and click on the **Edit** button to open the contact details page. Update the details required and click on the **Save** button.
7	To **Remove** the specific contact details, select the contact from the list and click on the **Remove** button to remove the contact from the contact details page.

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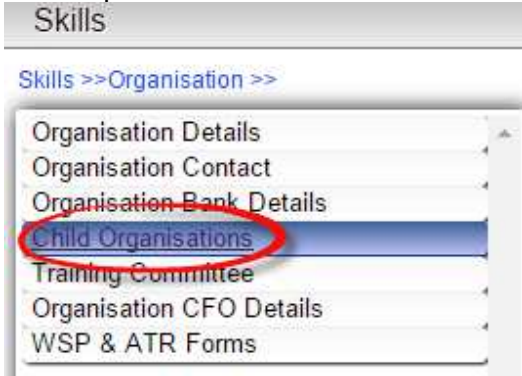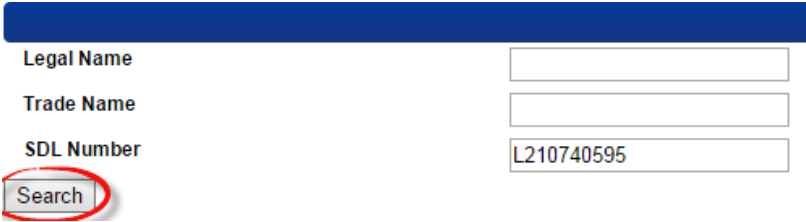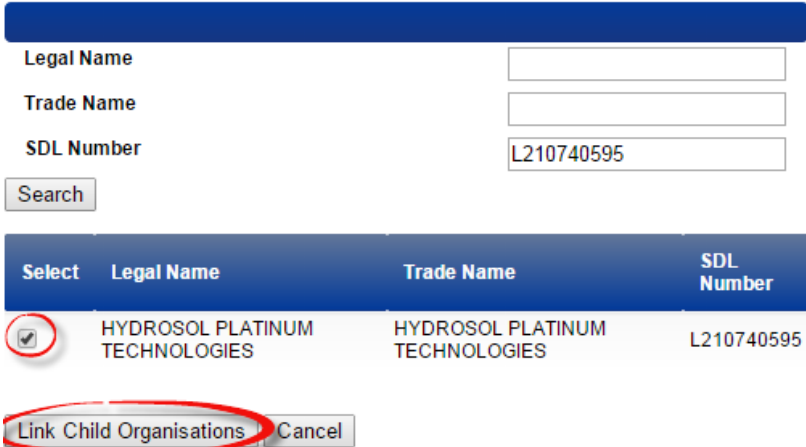
The SDF needs to validate the banking details currently on the MQA records.

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To **validate** the **Organisation Bank Details** the SDF will click on the **Organisation Bank Details** menu option.
3	The SDF needs to ensure that the details reflected on Indicium is correct as this will have an impact on the Grant Payments. The SDF can only view the details.

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.
3	To link a **Child Organisation** the SDF must click on the **Link Child Organisations** button.
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 **Select** tick box and clicking on the **Link Child Organisations** button.

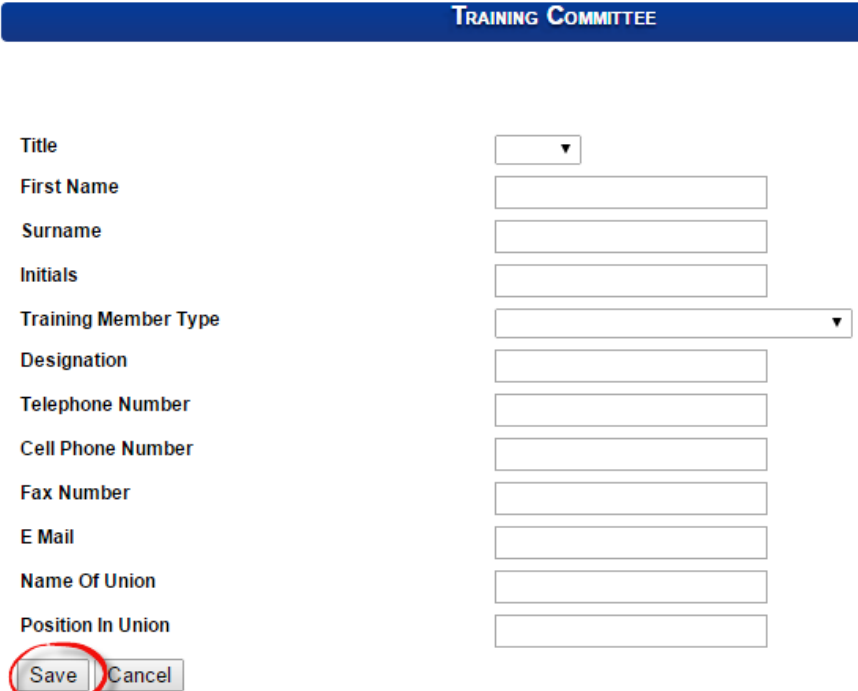| Step	Action / Screenshot
6	Indicium will link the organisation selected in step 5 to the Main (Parent) Organisation. **CHILD ORGANISATIONS - AMPLATS MANAGEMENT SERVICES (L350733343)** Link Child Organisations | Save | Remove | View Child **Legal Name** | **Trade Name** | **SDL Number** | **Link Start Date** | **Link End Date** HYDROSOL PLATINUM TECHNOLOGIES | HYDROSOL PLATINUM TECHNOLOGIES | L210740595 | 01/04/2014 First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1
7	To **View** the specific child organisation, select the organisation from the list and click on the **View Child** button to open the organisation details page of the child organisation. **CHILD ORGANISATIONS - AMPLATS MANAGEMENT SERVICES (L3** Link Child Organisations | Save | Remove | View Child **Legal Name** | **Trade Name** | **SDL Number** | **Link Start Date** HYDROSOL PLATINUM TECHNOLOGIES | HYDROSOL PLATINUM TECHNOLOGIES | L210740595 | 01/04/2014 First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1
8	To **Remove** the specific child organisation if incorrectly linked, select the organisation from the list and click on the **Remove** button. **CHILD ORGANISATIONS - AMPLATS MANAGEMENT SERVICES (L3** Link Child Organisations | Save | Remove | View Child **Legal Name** | **Trade Name** | **SDL Number** | **Link Start Date** HYDROSOL PLATINUM TECHNOLOGIES | HYDROSOL PLATINUM TECHNOLOGIES | L210740595 | 01/04/2014 First | Previous | Next | Last | Go to Page | 1 | Page 1 of 1

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 **Training Committee Members** to the organisation, the SDF will click on the **Training Committee** menu option.
3	The SDF will click on the **Add Training Committee Members** button to open the **Training Committee** window.
4	Indicium will open the **Training Committee** window for the SDF to capture the information. The SDF needs to click on the **Save** button to save the information captured.

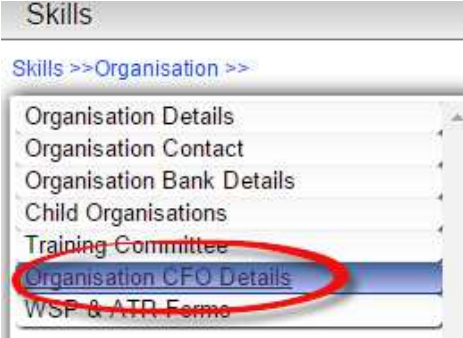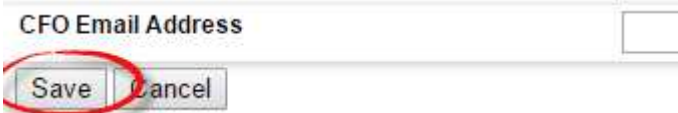| Step	Action / Screenshot
5	Indicium will save the training committee member on the **Training Committee** page.
6	To update the **Training Committee member,** the SDF will select the member and then click on the **Update** button to open the details of the member. The SDF must click on the **Save** button to save the details updated.
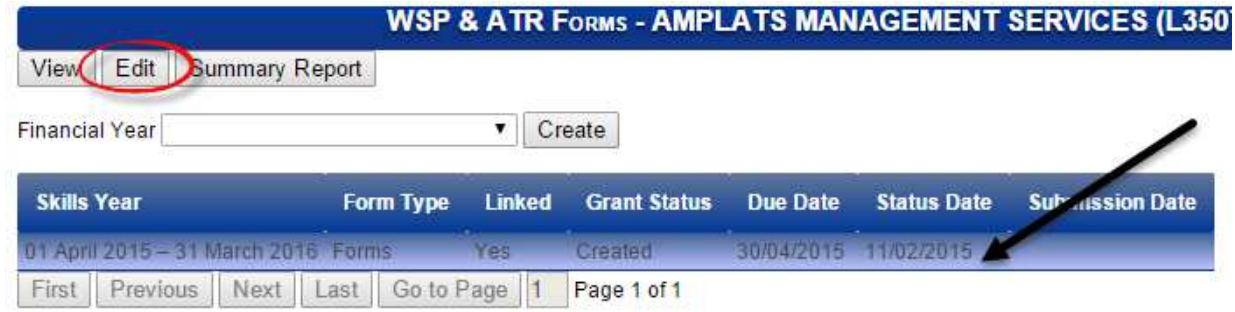
4.3.6 Organisation CFO Details

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To add **CFO Details** to the organisation the SDF will click on the **Organisation CFO Details** menu option.
3	The SDF will click on the **Edit** button to enable the fields for editing.
4	The SDF must click on the **Save** button to save the details.

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 **WSP & ATR Forms** menu option.
3	The SDF must select the applicable **Financial Year** from the lookup field and click on the **Create** button.
4	Indicium will create the forms for the specific **Financial Year** selected.
5	The SDF will select the record created and click on the **Edit** button.

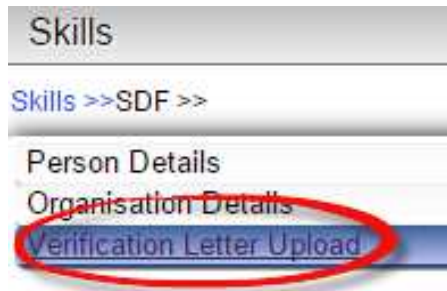| Step	Action / Screenshot
6	The SDF must select the scenario for the WSP record created from the **Submission Scenario** lookup list and click on the **Save** button. Please refer to the **Requirements** document for the explanation of the scenarios.
7	The SDF now needs to navigate to the list of organisations linked to the SDF profile. This is done by clicking on the **Skills** menu option, and selecting the **SDF** option from the menu options
8	The SDF will search for their own profile, and then access it (steps 7 – 10 section 6)
9	The SDF will highlight the company that requires the **Verification Letter** to be generated and then clicks on the **Generate Verification Letter** button. **NOTE:** The Verification letter can only be generated once an Organisation conatcts, at least **one** Senior Financial Representative or CFO, **one** Senior Organisation Representative or CEO, and **one** Organisation contact Person (other than SDF) are uploaded for SDF Verification process.
10	Once the **Verification Letter** is signed, the SDF must upload this letter by following steps 7 – 10

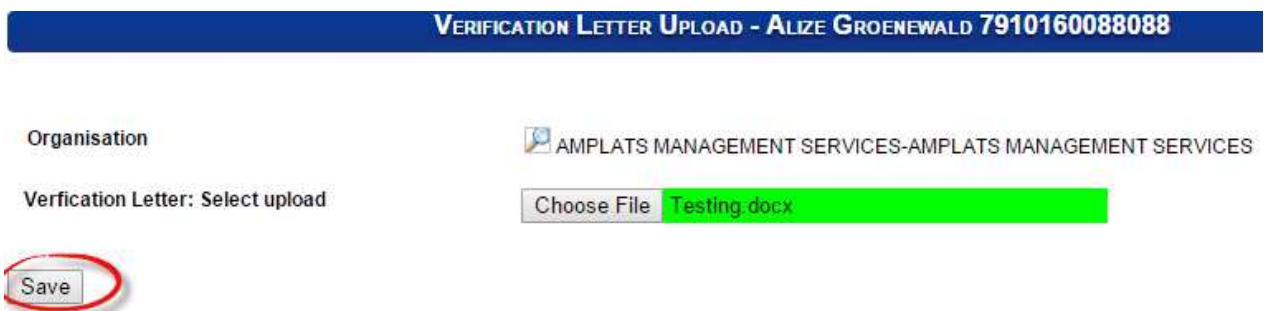| Step	Action / Screenshot
	section 6, click on the **Verification Letter Upload** menu option,.
11	The SDF needs to select the Organisation for which the **Verification Letter** is intended for by clicking on the magnifying glass next to **Organisation.**
12	The SDF will search for the organisation completing one of the filters and clicks on the **Search** button or alternatively the **Search** button is solely clicked on – Indicium will return the results per filter criteria, or return all organisations linked to the SDF, if doing a blank search. The SDF will select the organisation by clicking on the organisation name and clicks on the **Select** button.
13	The SDF then uploads the **Verification Letter** by clicking on the **Choose File** button and follows steps 16 – 18 in section 6. The SDF will save the upload by clicking on the **Save** button.
14	Indicium sends an e–mail to the SDF confirming the upload of the **Verification Letter.**

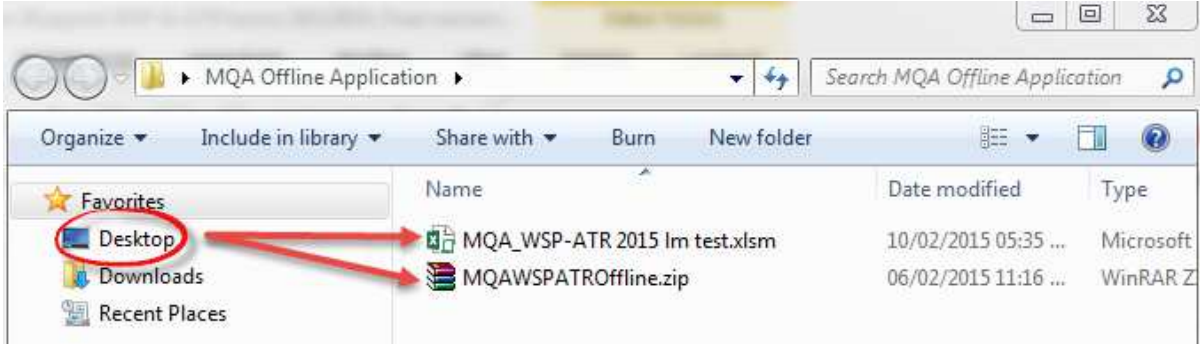| Step	Action / Screenshot
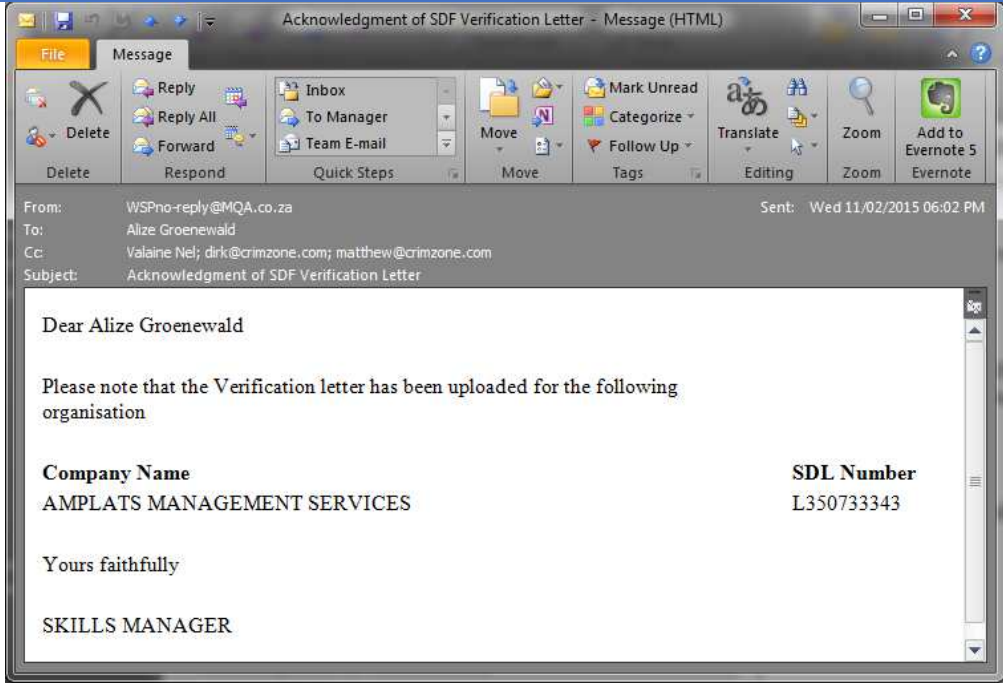
5 WSP/ATR Offline Application Functionality

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
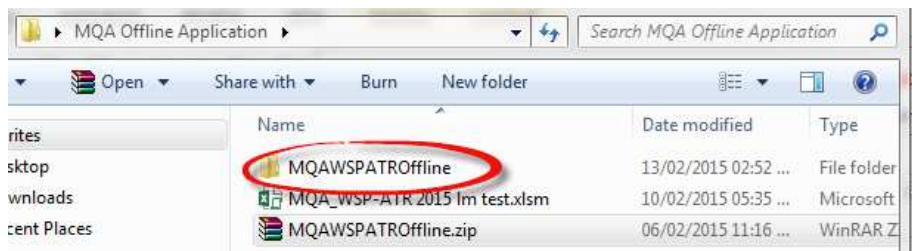
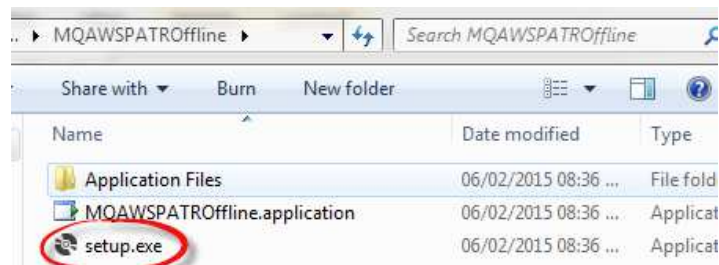| Step	Action / Screenshot
1	The SDF will receive 2 files i. MQAWSPATROffline.zip ii. MQA_WSP-ATR 2015.xlsm
2	Create a **MQA Offline Application** folder on the computer desktop (C:\Users\sdf\Desktop\MQA Offline Application) and **SAVE BOTH** files in this folder.
3	Now, extract the contents of the **MQAWSPATROffline.zip** file in the same folder – right click on this file, and select the **Extract to MQAWSPATROffline** option.
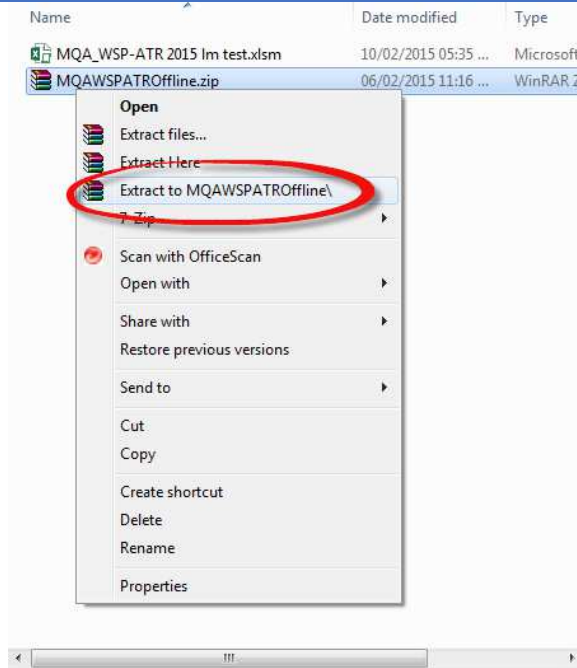
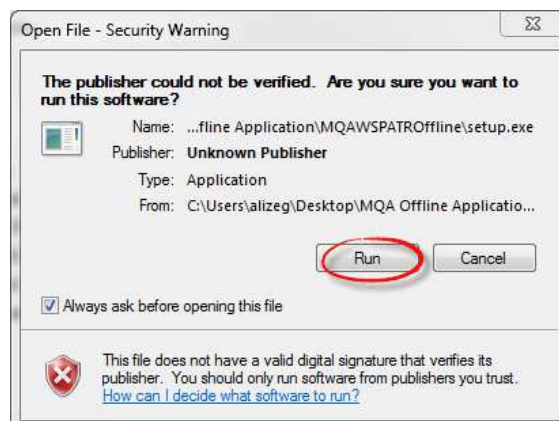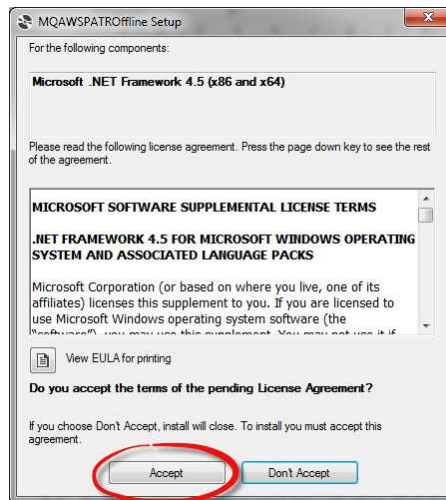| Step	Action / Screenshot
4	This will create a **MQAWSPATROffline** folder in the **MQA Offline Application** folder.
5	Access this folder and double click on the **setup.exe** file.
6	Click **Run** on the window to confirm the action.

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
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.
10a	Wait for this installation to complete.
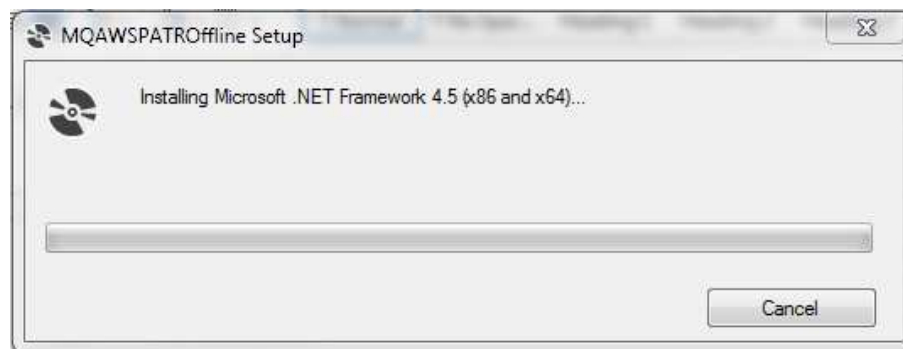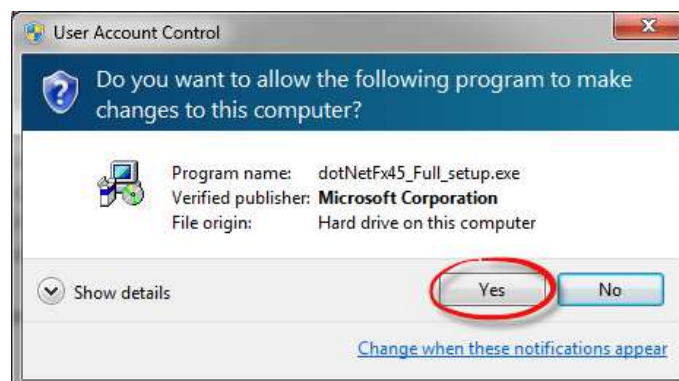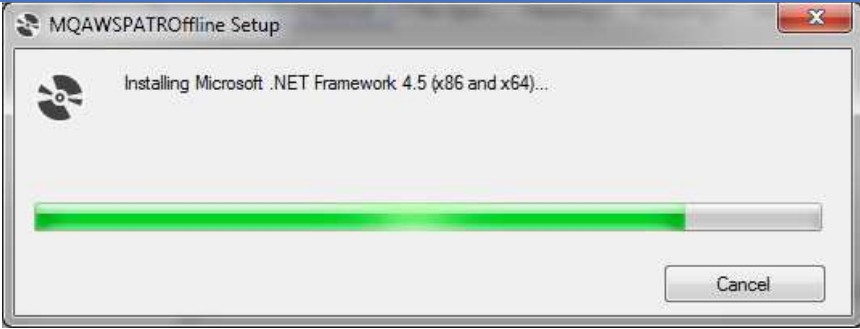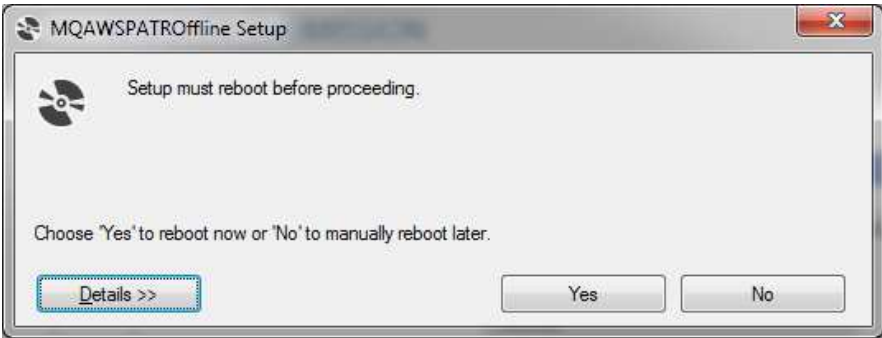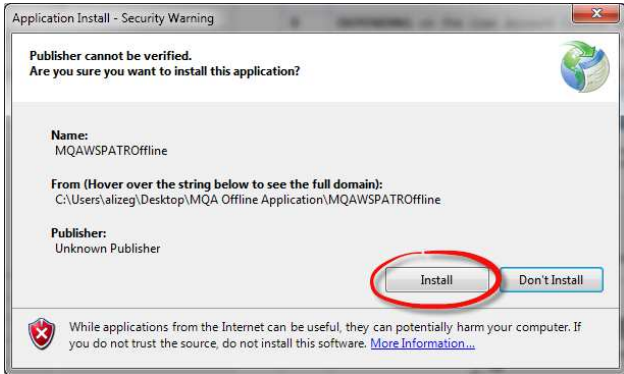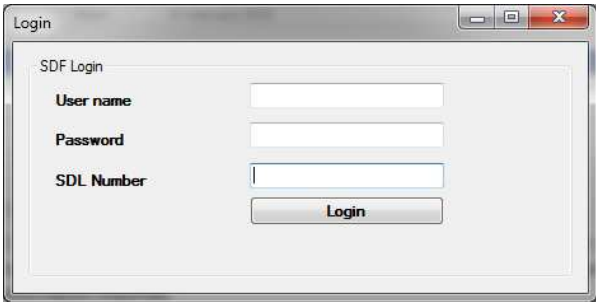
Step	Action / Screenshot
10b	**NOTE:** On some computers the installer will request for a computer restart or reboot
11	Click **Install** on the next window that opens
12	The Offline Application window will open, ready for the SDF to logon with the current Username, Password and SDL Number
13	The application is also available on the Windows start-up menu should the SDF require to go back at anytime.

Step	Action / Screenshot

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	N
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	Lookup Field	Y
11	Municipality	Lookup Field	Y
12	Highest Qualification Type	Lookup Field	Y
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	Y
18	OFO Occupation	Lookup Field	Y
19	Qualification / Learning Programme Type	Lookup Field	N
20	Specify if selected Skills Programme, Learnership or a NQF 5-10 Learning in previous column	Lookup Field	N
21	Achievement Status	Lookup Field	N
22	Year Enrolled / Finished	Lookup Field	N

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 **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.
2	The **OFO Occupation Code** field has a built in search functionality. When you click in this field, a page will open that looks as follows (please see below):

The SDF can search for the occupation by adding **search criteria** and clicking on the **Search** button.

OR select an occupation from the list for more information

Step	Functionality
	When the SDF clicks on the occupation the information will be displayed as follows: The SDF will click on the **Select Occupation** button to select the occupation just viewed **PLEASE NOTE** In order to search for the OFO Occupation, the **Job Title** field must be populated with a title.
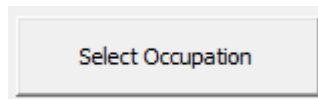
5.2.2 Form 2: WSP

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 *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 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 **Lookup** 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.

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.**

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 **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.
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 <table><tr><td>#</td><td>Subsection</td><td>Comment</td></tr><tr><td>1</td><td>ABET values</td><td>These are fixed, and cannot be changed</td></tr><tr><td>2</td><td>Disciplines in which bursaries are being offered</td><td>For this section, the SDF will select the discipline from a lookup value field</td></tr><tr><td>3</td><td>Other Community Programmes(Specify)</td><td>For this section, the SDF will select the discipline from a lookup value field</td></tr></table>

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	Y
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.

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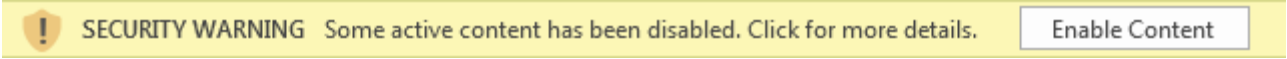
Step	Functionality
1	All fields indicated as a **Lookup** field, are fields with a lookup with specific values to use. The SDF cannot change these, or use values other than what is in the list of lookup values.

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.

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:
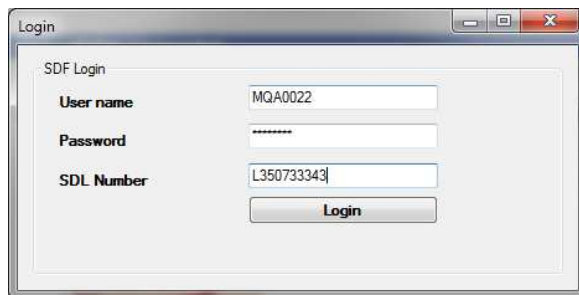
- Be online or connect to the internet first **before** logging on to the Offline Application
- The Excel templates can at any stage be imported into the WSP/ATR Offline Application
- Use an Excel template per company that needs to be submitted
- The data can be sent to Indicium at **any stage**, but **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.

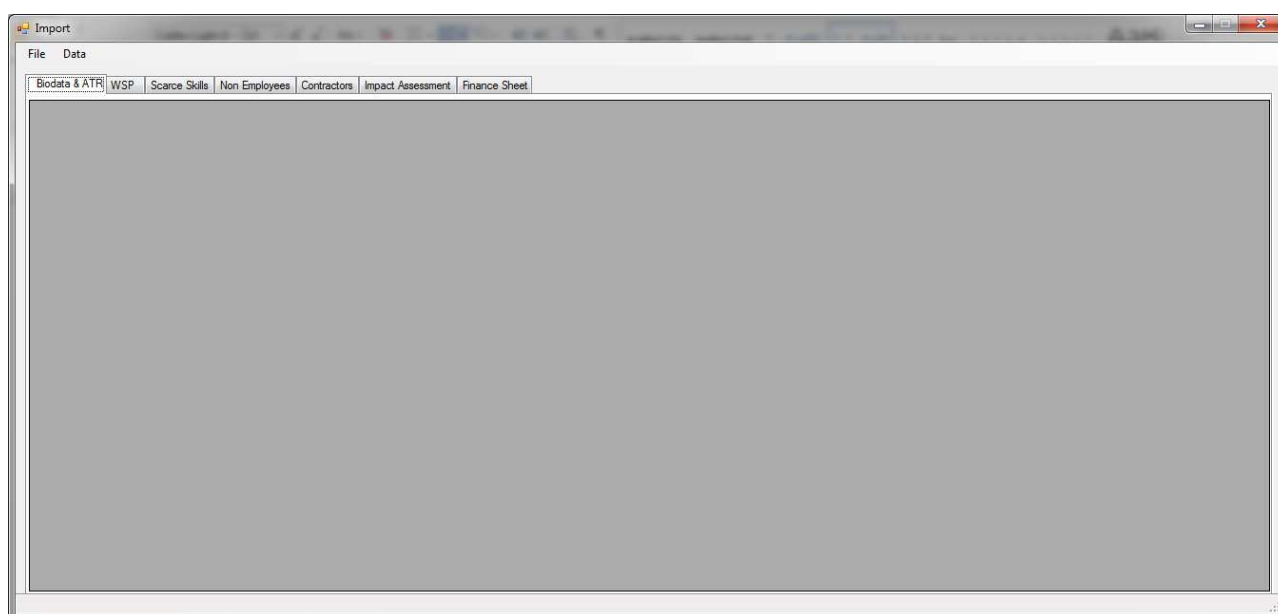| Step	Action / Screenshot
1	Open the excel template, and click on the **Enable Content** button. This will enable the excel spreadsheet, rules and built in formulas, allowing the SDF to capture the information. SECURITY WARNING Some active content has been disabled. Click for more details. Enable Content
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 **AS-IS**.
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. Lync 2013 Microsoft Excel 2010 PowerPoint 2013 MQAWSPATROffline All Programs Search programs and files

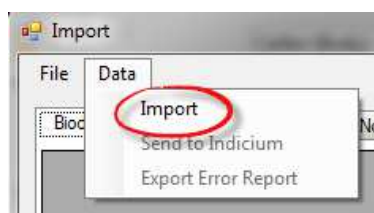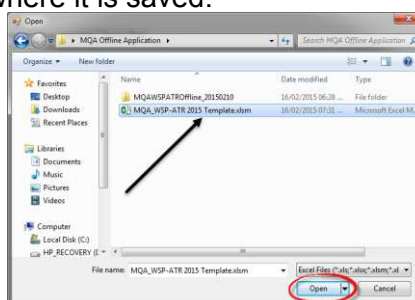| Step	Action / Screenshot
5	The logon window to the offline application will open and the SDF will need to add their **Username, Password** and **L-number** of the company that they are busy uploading.
6	The application will open when the SDF clicks the **Login** button.

Step	Action / Screenshot
7	The data captured in the excel template must now be imported into the application. To do this, click on the **Data** menu name and select **Import** from the options.
8	Select the file from the location where it is saved.
9	The data will be uploaded into the template, the progress bar will show progress of the import.

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.
	To download the error report click on the **Data** menu option and select **Export Error Report.**
	Import — File — Data — Import — Send to Indicium — Export Error Report
10	The errors will also be indicated on the form itself, for example in this case on the Non-Employees form
	Import — File — Data — Biodata & ATR | WSP | Scarce Skills | Non Employees | Contractors | Impact Assessment | Finance Sheet — ErrorDescription / ProgrammeType / TargetBeneficiaries / TotalDone / CommentsProgramr / TargetBenefic — 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 2 / / 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 **Data** menu and the **Send to Indicium** option.
	Import — File — Data — Import — 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.
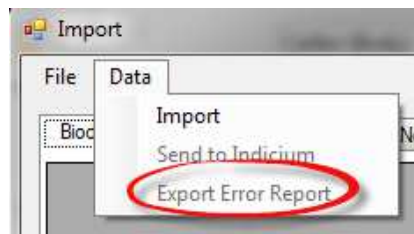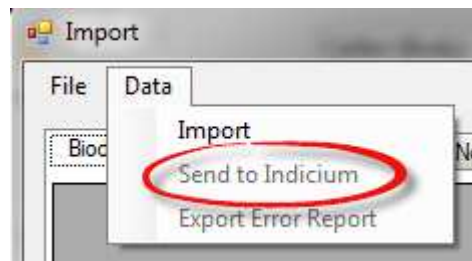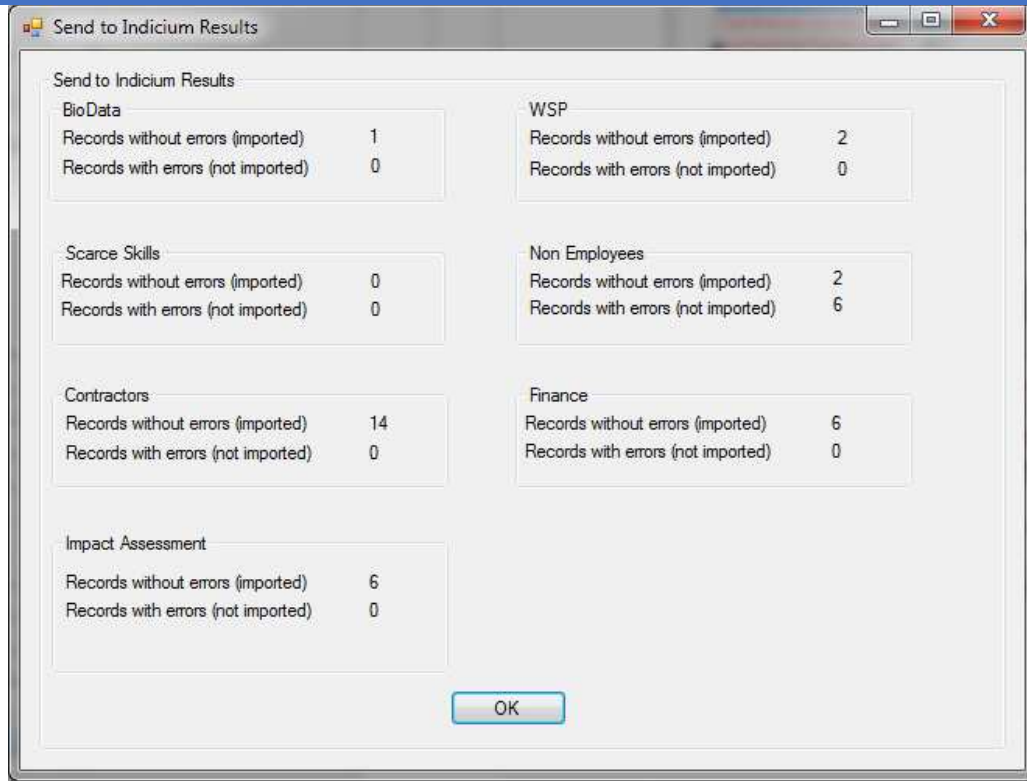
Step	Action / Screenshot
13	The Application will open on the first form again after the SDF clicks on the **OK** button.
14	To exit the application click on the **File** menu and click on the **Exit** option – doing this will require the SDF to logon again.

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.
5	Indicium opens the WSP & ATR forms section on the right panel of the screen:

Step	Action / Screenshot
6	The SDF will select the financial year that relates to the submission, which is on 30 April 2015. Click on the **View** button to open the set of forms that must be completed.
7	Indicium will display the list of forms that need to be completed.
8	Click the **Select** button to open the form and view the details.
9	The details that have successfully been sent to Indicium will be displayed on the online form.

Step	Action / Screenshot

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.
3	Indicium opens the WSP & ATR forms section on the right panel of the screen:
4	To **validate** the **Organisation Banking Details,** the SDF will click on the **Organisation Bank Details** menu option.

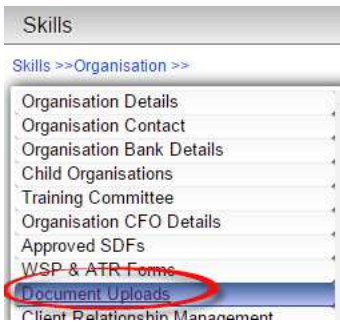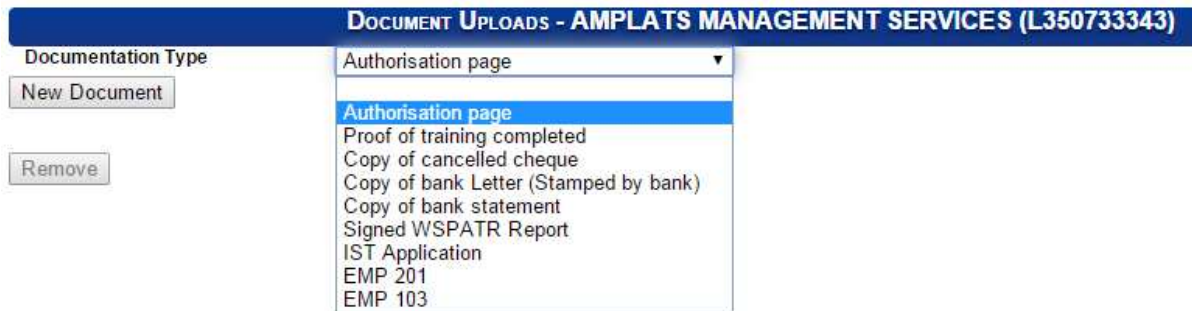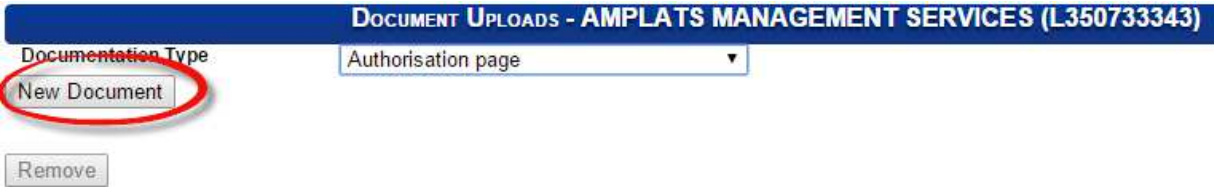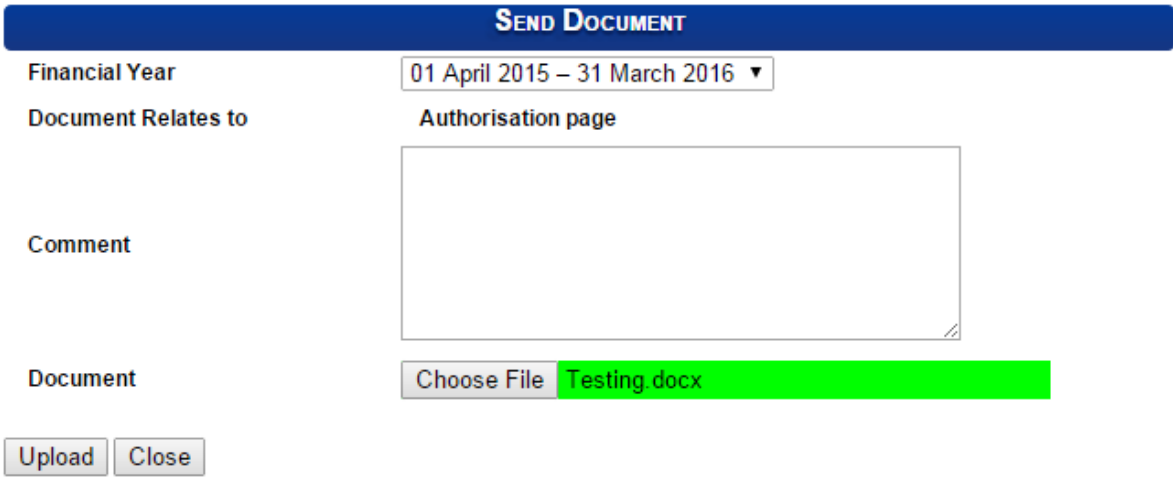| Step	Action / Screenshot
5	Indicium opens the report in the browser for the SDF to view, the **Create PDF** button allows the SDF to create the document.

7 Uploading of Documents

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

Step	Action / Screenshot
1	Follow steps 1 – 7 in section 7.1
2	To upload documents click on the **Document Uploads** section.
3	The SDF must select the type of document to upload from the **Documentation Type** lookup field. **NOTE:** It is important that the SDF selects the correct document type in order for Indicium to recognize the document and apply the correct rules.
4	Once the documentation type is selected, the document must be chosen from the location where it is saved by clicking on the **New Document** button.
5	This will open a window where the SDF needs to select the financial year. Click on the **Choose File** button to select the document from its location.

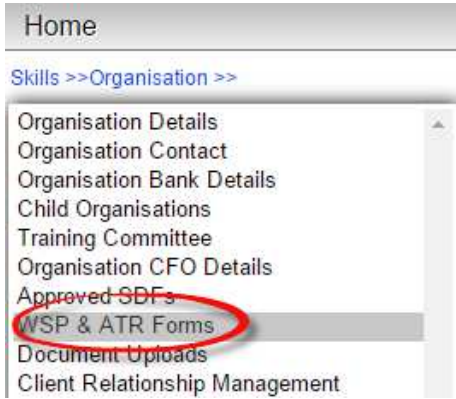| Step	Action / Screenshot
6	Indicium will show a green bar if the document has been successfully uploaded. Click on the **Upload** button to save the document.
7	Indicium will display the upload:

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 **Organisation Contact Person Details,** the SDF will click on the **WSP & ATR Forms** menu option.
3	The SDF will select the year that relates to the submission which is due on 30 April 2015. Click on the **Submit** button to submit the WSP/ATR. **NOTE:** The Grant Status will change from **Created** to **Submit.** The **Submission Date** will be updated with **the** date on which the **Submit button** was clicked**.** **NOTE: Once submitted, it is _final_. The SDF will not be able to change any information**.

9 NOTES