

# LMIS USER GUIDE



Fibre Processing & Manufacturing Sector Education and Training Authority

FUTURE SKILLS • EMPLOYABILITY • GROWTH

## WSP & ATR Submissions SDF

External

**LMIS User Guide – WSP & ATR Submissions SDF**

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**LMIS User Guide – WSP & ATR Submissions SDF**



## 1. Introduction

Integrated **Learner Management Information System** was developed to help **FP&M SETA** facilitate the following:

- i. Registration of Skills Development Facilitator on LMIS.
- ii. Submission of Work Skills Plan and Annual Training Reports on LMIS by SDFs on behalf of Entities.
- iii. Approval of WSP and ATR by FP&M SETA on LMIS, for Entities to comply and qualify for Mandatory Grants.
- iv. Skills shortage reporting and facilitation of processes to Provide Grants, which will address this issue.
- v. Planning to address skills shortage by being proactive, this is through an accurate research and reporting.
- vi. Maintaining a relationship between Employer, Learners, SDP and FP&M SETA through the entire Intervention process. Constant communication between all parties to be facilitated via LMIS.
- vii. View single Truth of the information about the learner.
- viii. Reporting on Chambers and its sub-sectors.

This user manual only covers SDF functionality. Below is the URL to access the application:

Application Name	Learner Management Information System
<b>URL</b>	<a href="https://lmis.fpmseta.org.za">https://lmis.fpmseta.org.za</a>
<b>Recommended Supported Sites</b>	<ol style="list-style-type: none"> <li>1. Google Chrome</li> <li>2. Mozilla Firefox</li> <li>3. Apple Safari</li> <li>4. Microsoft Edge</li> </ol>

## LMIS User Guide – WSP & ATR Submissions SDF

### 3. Register an SDF

This section demonstrates and explains how a **Skills Development Facilitator (SDF)** can gain access to LMIS and start capturing **WSP** and **ATR**.

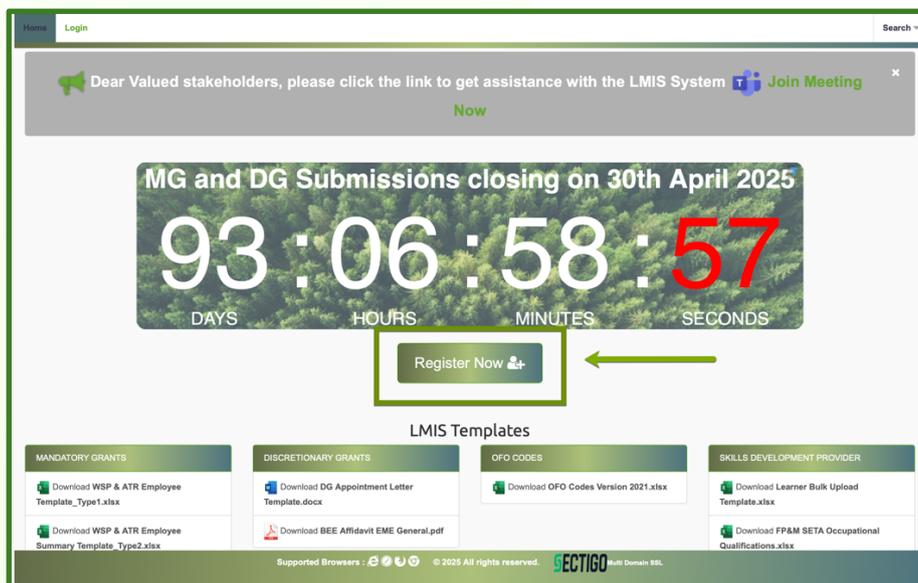
### 4. User Registration

A user needs to Register on the system as a SDF before gaining access to the following key features:

- i. Register a Company on LMIS and supply all key information for WSP and ATR submission.
- ii. Upload Supporting Documentation.
- iii. Capture WSP and ATR in using these methods (Manually, Copy Form Last Year) then submit for Review and Approval.

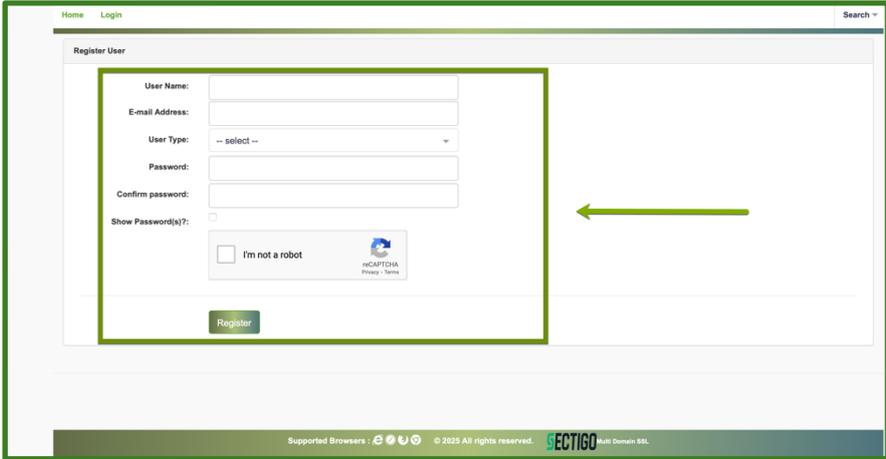
#### 1.3 Register a User

- i. To register on the LMIS System, you click on the **“Register Now”** button to open the Registration page as below:



- ii. You must complete your information as shown in the screen below to register as a Skills Development Facilitator:

## LMIS User Guide – WSP & ATR Submissions SDF



The screenshot shows the 'Register User' page of the LMIS. The form contains the following fields:
 

- User Name: [Text Input]
- E-mail Address: [Text Input]
- User Type: [Dropdown Menu (value: -- select --)]
- Password: [Text Input]
- Confirm password: [Text Input]
- Show Password(s)?:
- Security:  I'm not a robot (with CAPTCHA logo)
- Register: [Green Button]

 A green box highlights the registration fields, and a green arrow points to the right from the CAPTCHA area.

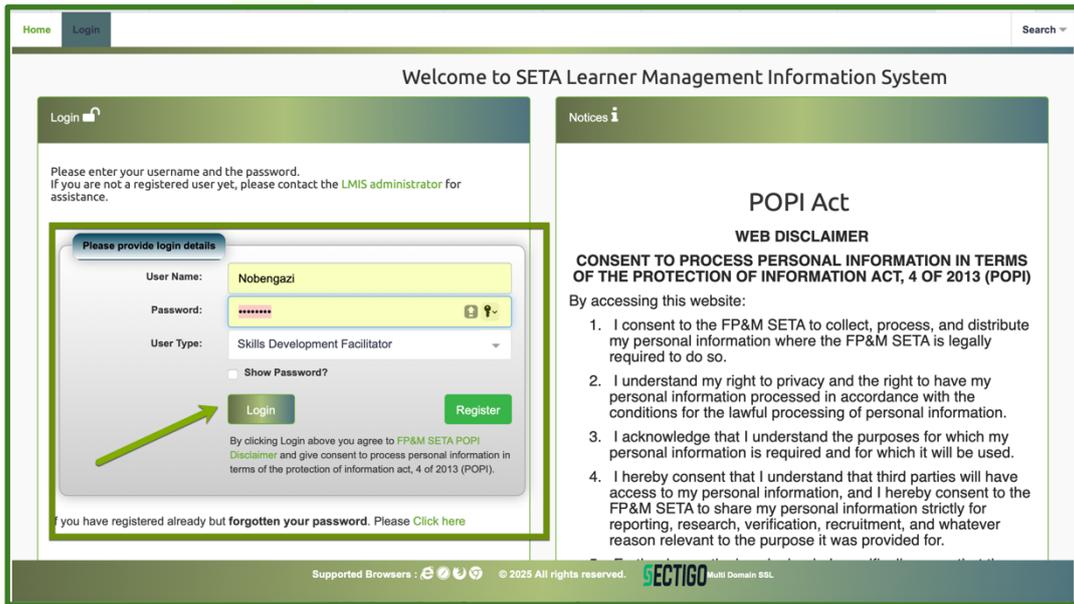
- iii. Once the registration information is successfully captured, a success message with instructions on how to activate the account will appear as below:



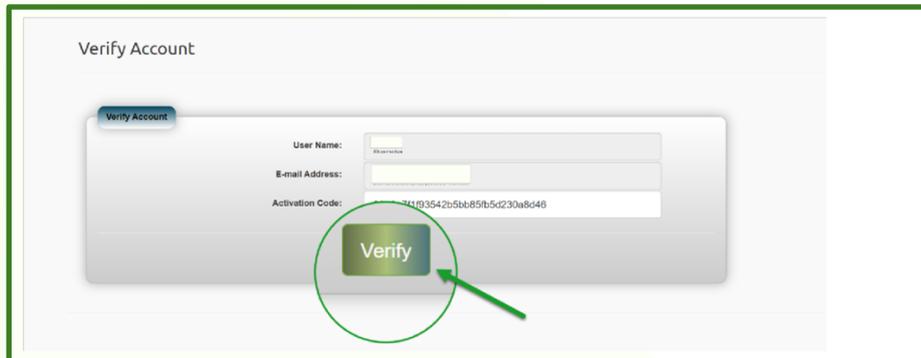
### 1.3.1 User Login

- i. A user will then have to open the Login page of LMIS to successfully activate the account. The SDF continues to enter their login details, the system will automatically populate the “**User Type**” field based on the Username. The user then clicks on the “**Login**” button to proceed.

## LMIS User Guide – WSP & ATR Submissions SDF



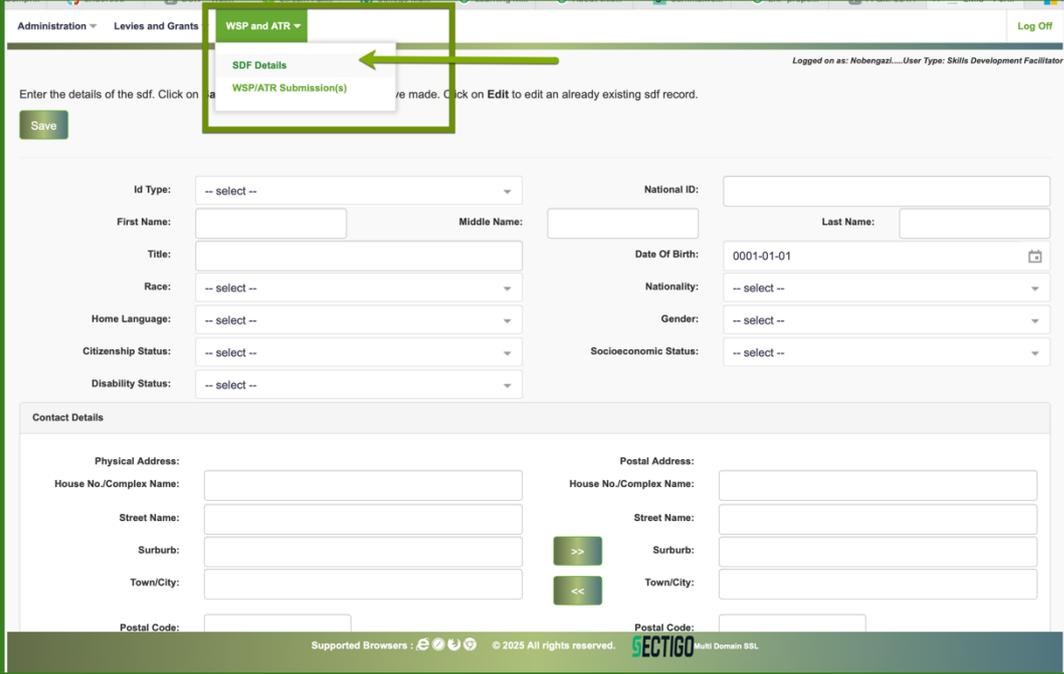
- ii. Once the necessary information has been captured On the Login page, the system navigates to the “**Verify Account**” (New User Verification) page as below. The user enters (copy and paste) the Verification Code, then clicks on the “**Verify**” button to proceed.



### 1.4 SDF Personal Details

- i. Login as an SDF and the system will navigate you to the profile screen, in write mode. Complete the SDF profile as show below:

## LMIS User Guide – WSP & ATR Submissions SDF

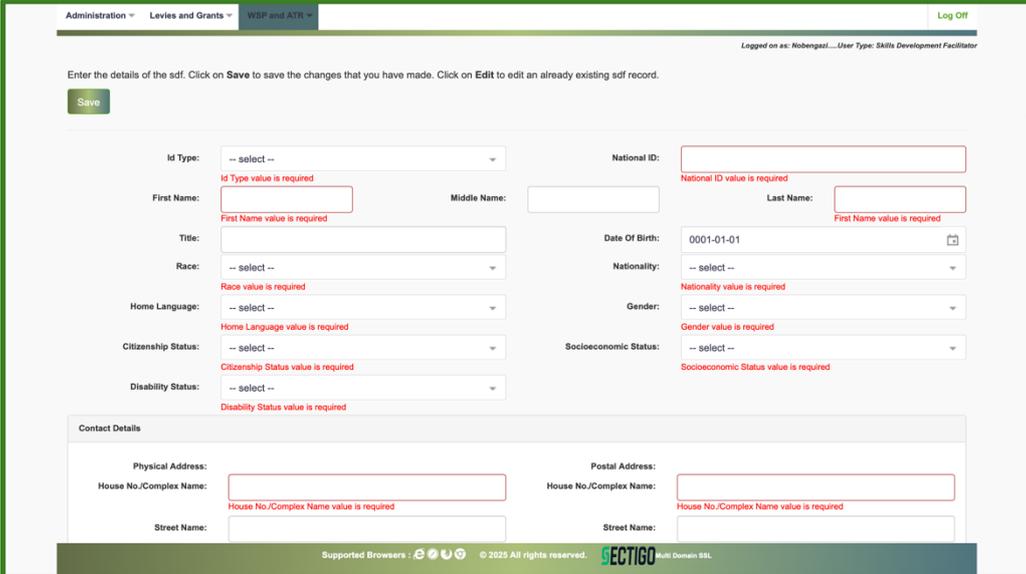


The screenshot shows the 'WSP and ATR' submission form. A green box highlights the 'WSP/ATR Submission(s)' dropdown menu, with an arrow pointing to it from the left. The form contains various input fields for personal and contact details, and a 'Save' button.

ii. Enter the necessary information on the person profile and click the Save.



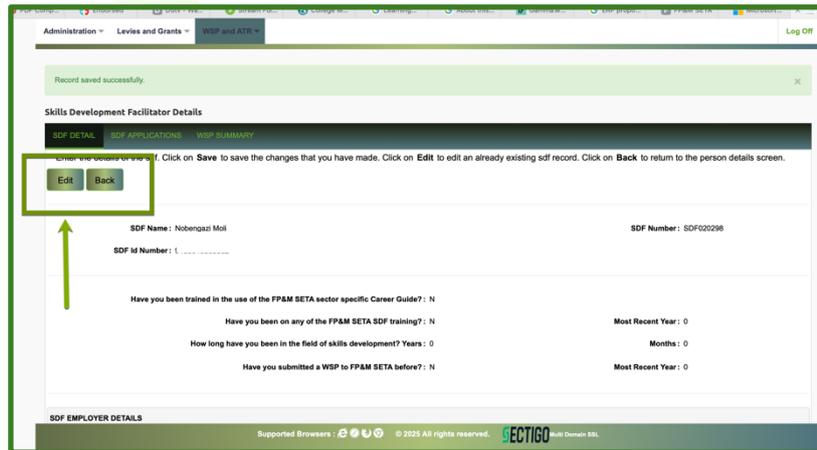
Should you attempt to click on “Save” button without filling the form in full, the system will highlight the compulsory information in “Red” as below:



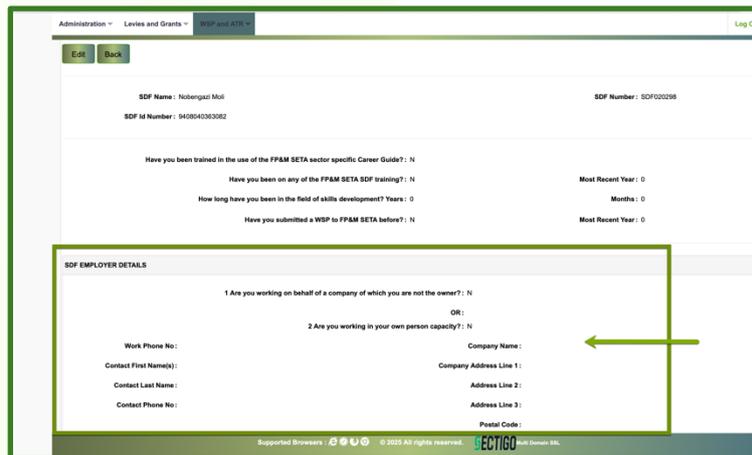
The screenshot shows the 'WSP and ATR' submission form with red error messages. Red text labels like 'Id Type value is required', 'National ID value is required', 'First Name value is required', 'Race value is required', 'Home Language value is required', 'Citizenship Status value is required', 'Disability Status value is required', 'Nationality value is required', 'Gender value is required', 'Socioeconomic Status value is required', 'House No./Complex Name value is required', and 'Street Name value is required' are visible next to empty or unselected fields.

iii. Once all the information has been captured and the SDF clicks on “Save”, LMIS saves the information and proceeds to the next step of SDF Registration as seen below:

### LMIS User Guide – WSP & ATR Submissions SDF

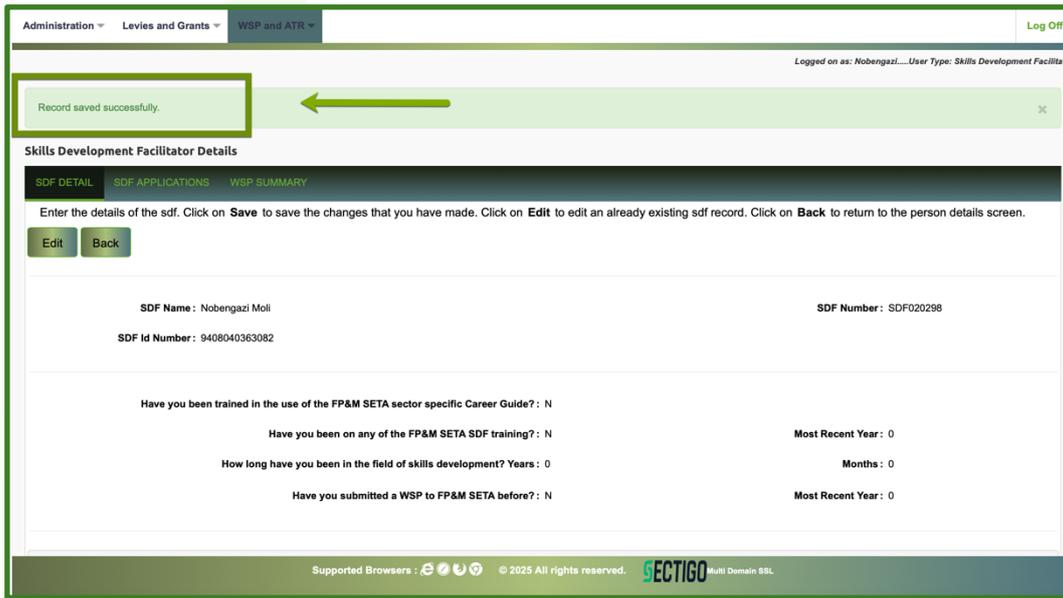


- iv. Fill in the SDF profile details, which includes how long the person has been in the sector, their recent activity regarding submissions, any training received in SDF work and whether the SDF works under a certain company or in personal capacity along with the Employer Details, as below:



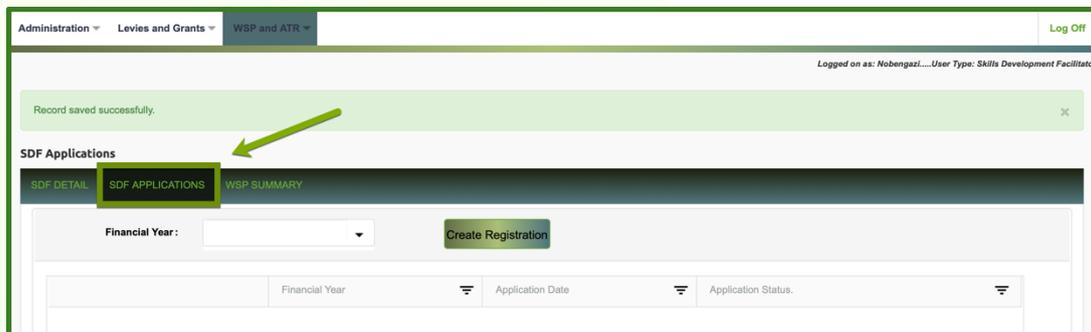
- v. As soon as the SDF provides complete information as required above, he/she will have to click the “**Save**” button which will perform an online validation to ensure that all compulsory fields are captured. All information will be saved permanently on the LMIS Database, the green bar will appear with a message stating, “**Record Saved successfully**”, as shown below:

## LMIS User Guide – WSP & ATR Submissions SDF



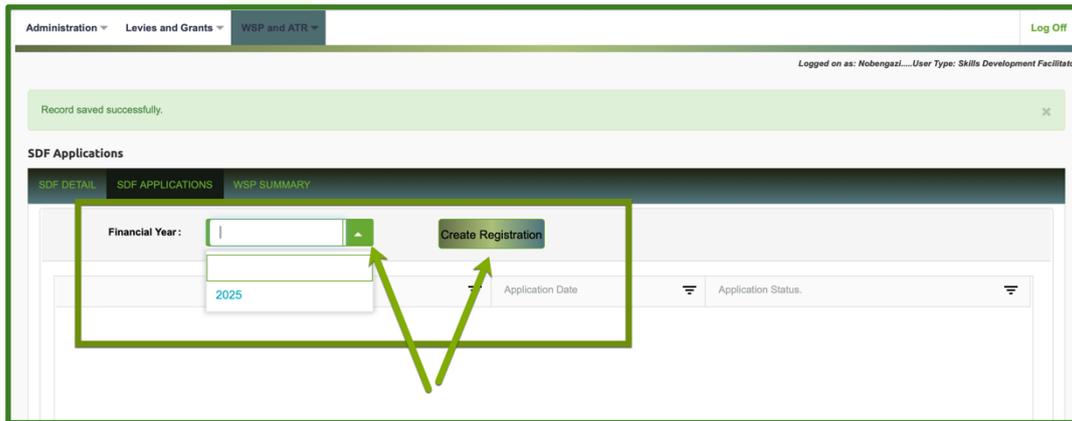
### 5. Registrations

- i. After the SDF has successfully registered, LMIS will navigate to the saved SDF Details. On the SDF Details tab, you will then click on the “**Registrations**” and apply for approval as below:

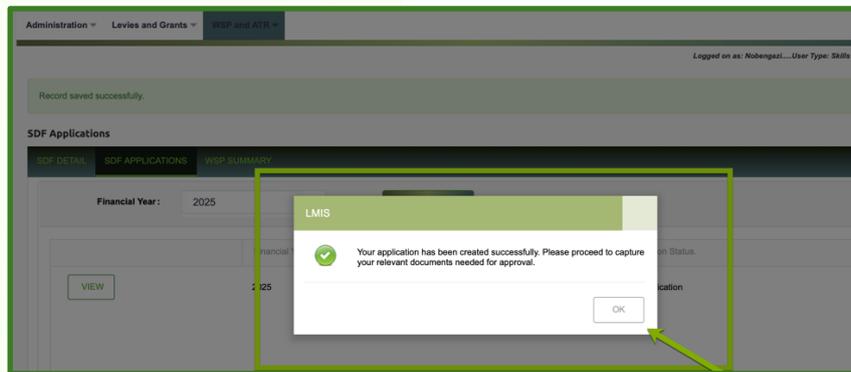


- ii. After the navigating to “**Registrations**”, you will then click on the “**Financial Year**” and “**Create Application**” to apply for approval as below:

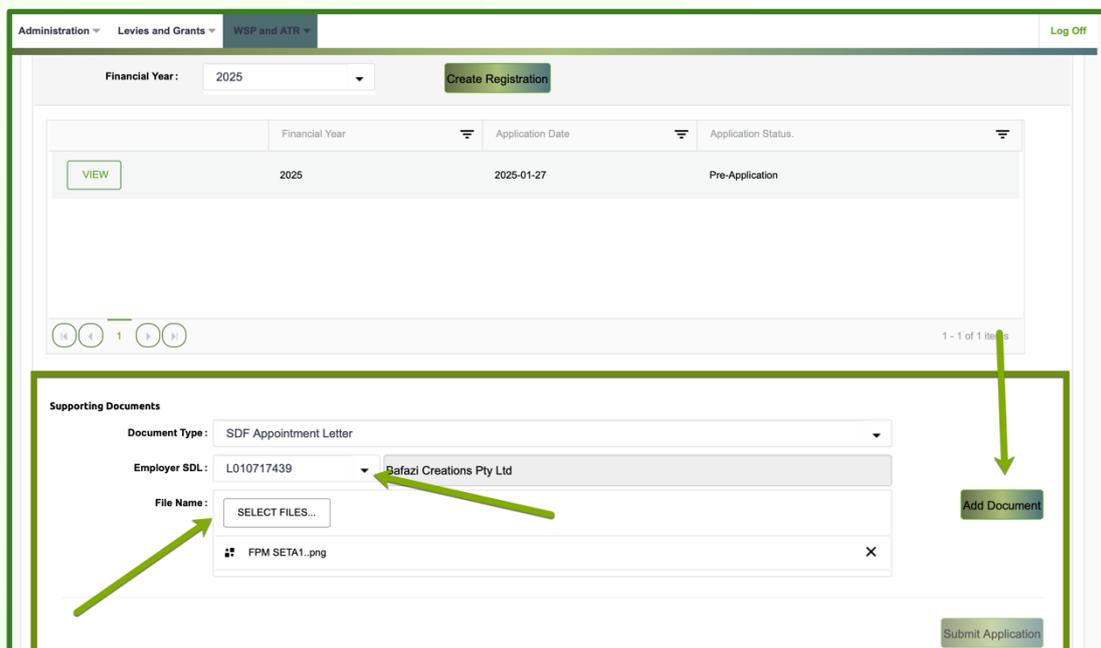
### LMIS User Guide – WSP & ATR Submissions SDF



- iii. Once the registration information is successfully captured, a success message will appear as below:



- iv. Once the registration information is successfully captured, the system will then redirect you to the next screen to upload supporting documents and to activate the account will appear as below:

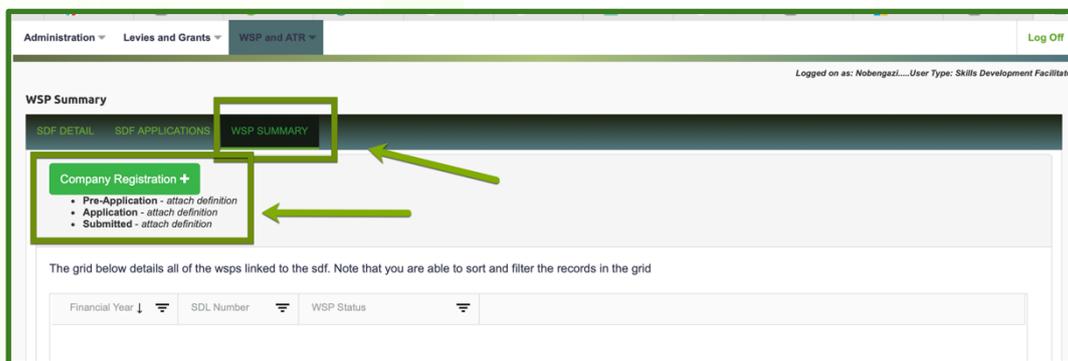


## LMIS User Guide – WSP & ATR Submissions SDF

- v. Once the supporting documents are successfully added, the system will then redirect you to the SDF detail screen, then click on registrations tab and click **“Submit Application”** to apply for approval.

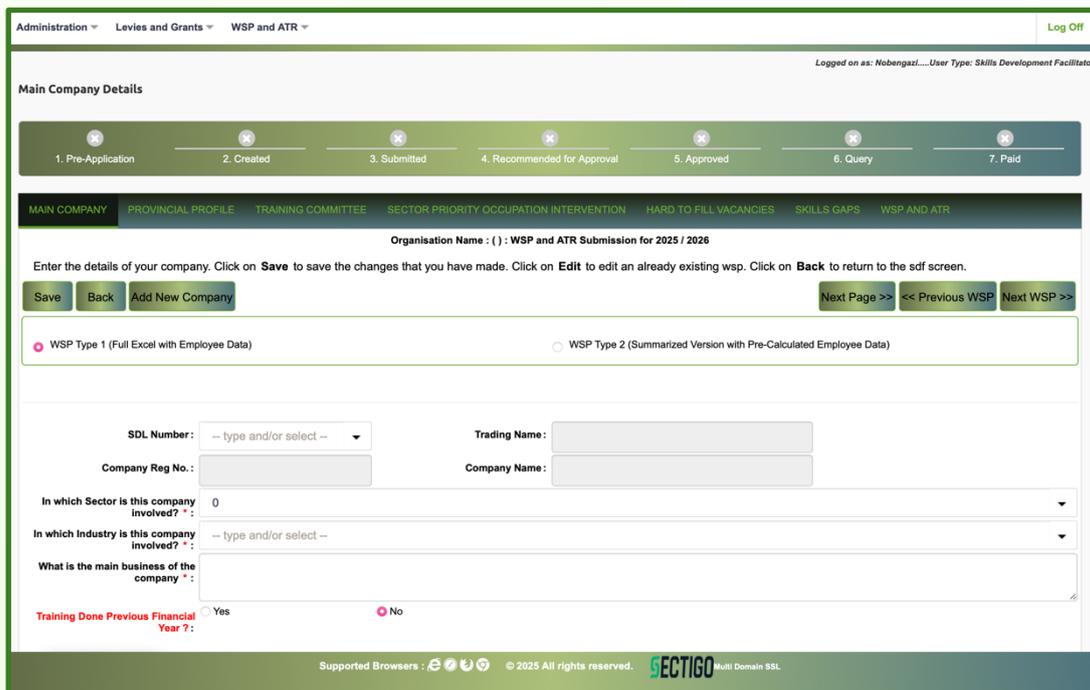
### 6. Company Registration

- i. After the SDF has successfully registered, LMIS will navigate to the saved SDF Details. On the SDF Details tab, then will then SDF click on the **“WSP Summary”** and **“Company Registration +”** button to proceed to capture the details of the company that the WSP/ATR is being captured for, as below:



#### 6.1 Main Company

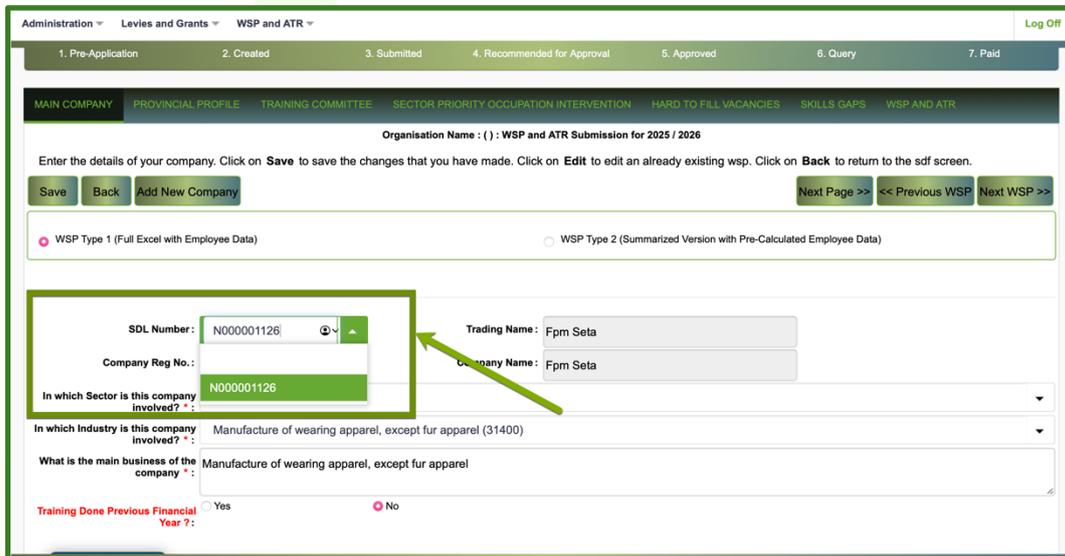
- i. The system will open the **“Company Registration”** page as below:



**Should you attempt to click on “Save” button without filling the form in full, the system will highlight the compulsory information in “Red”.**

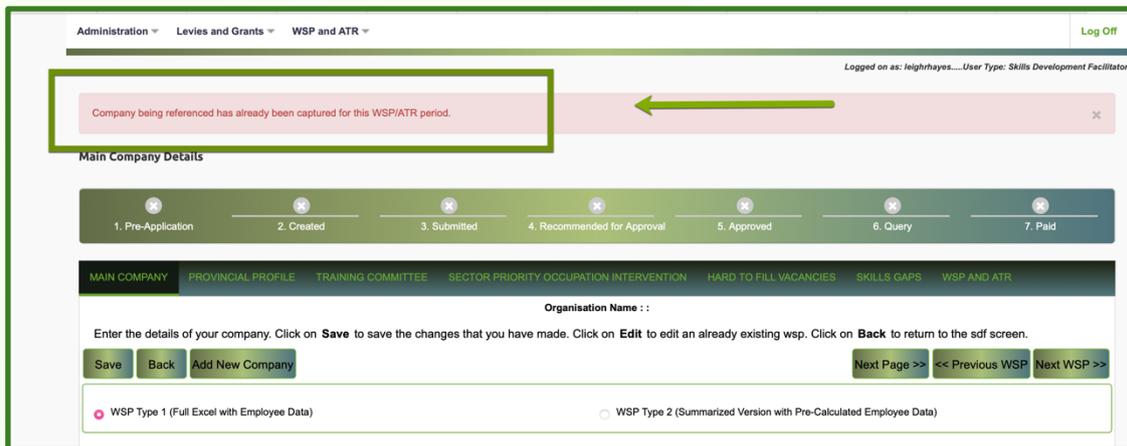
### LMIS User Guide – WSP & ATR Submissions SDF

- ii. Click the “**SDL Number**” dropdown and select the desired SDL Number populate the Main Company details, as below:



The screenshot shows the 'WSP and ATR' submission form. The 'SDL Number' dropdown menu is open, showing a list of options with 'N000001126' selected and highlighted in green. A green arrow points from the selected item to the 'SDL Number' label. Other fields include 'Trading Name: Fpm Seta', 'Company Name: Fpm Seta', and 'Company Reg No.: N000001126'. The form also includes sections for 'In which Sector is this company involved?', 'In which Industry is this company involved?', and 'What is the main business of the company?'. The 'Training Done Previous Financial Year?' section has 'No' selected.

- iii. The SDF continues to capture data on the form, before clicking on the “**Save**” button.
- iv. Once the company information is saved, the user can now capture information on the tabs that follow.
- v. A company that has already been captured as subsidiary or main company in the active WSP period cannot be added by another SDF otherwise an error message is displayed as below:

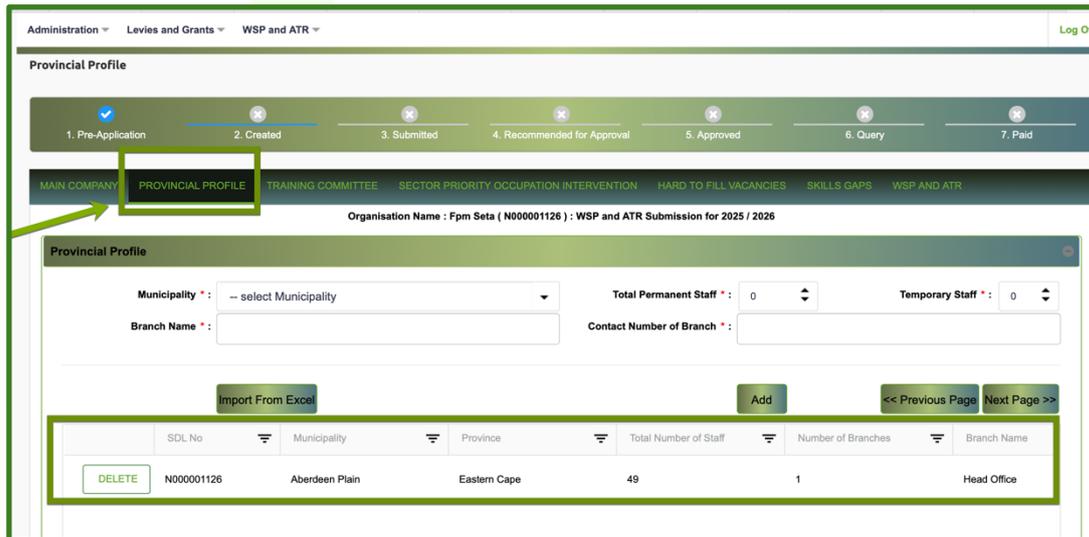


The screenshot shows the same WSP and ATR submission form, but with an error message displayed at the top: 'Company being referenced has already been captured for this WSP/ATR period.' The error message is highlighted with a green box, and a green arrow points to it. The form below the error message is partially visible, showing the 'Main Company Details' section and the 'Save' button.

## 6.2 Provincial Profile

- i. This below section is mandatory especially if the Entity has more than one branch in different provinces. Details portion and records on the provincial footprint of the company in the republic that is the branch network, shown below:

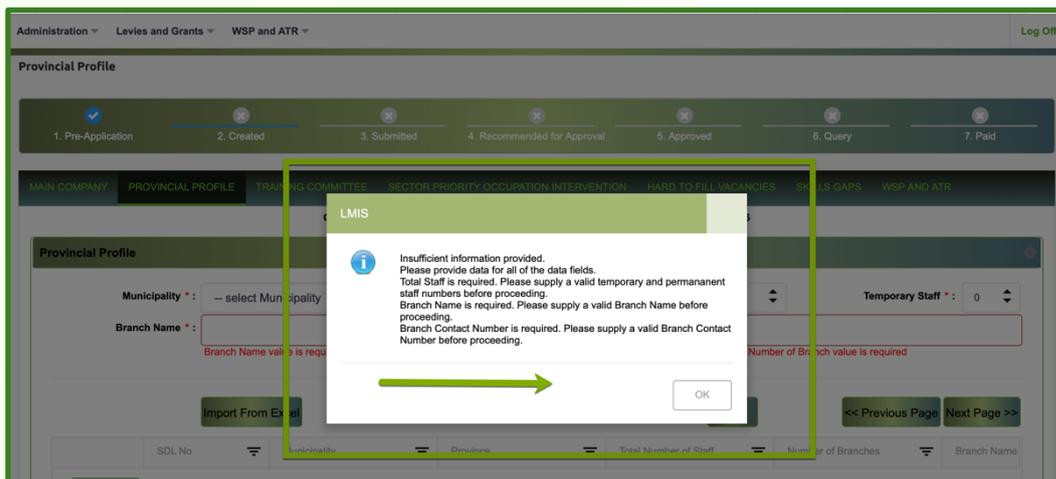
## LMIS User Guide – WSP & ATR Submissions SDF



- ii. This screen allows you to capture a Province in which each branch is located and how many branches in each province, the total number of staff employed at the branch, branch name and the branch contact number. The Levi number gets populated automatically.

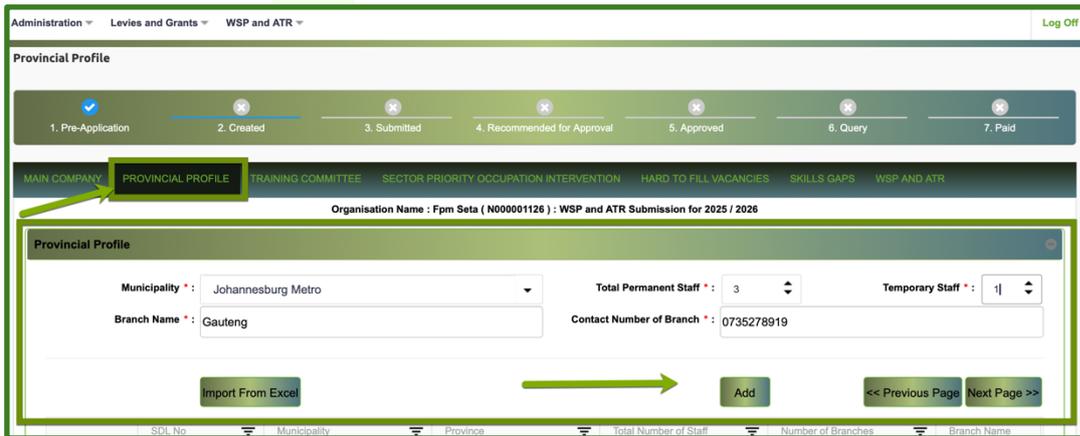


Attempting to click the Add button without specifying all the required branch information will result in the system throwing an error message of incomplete data provided as below:

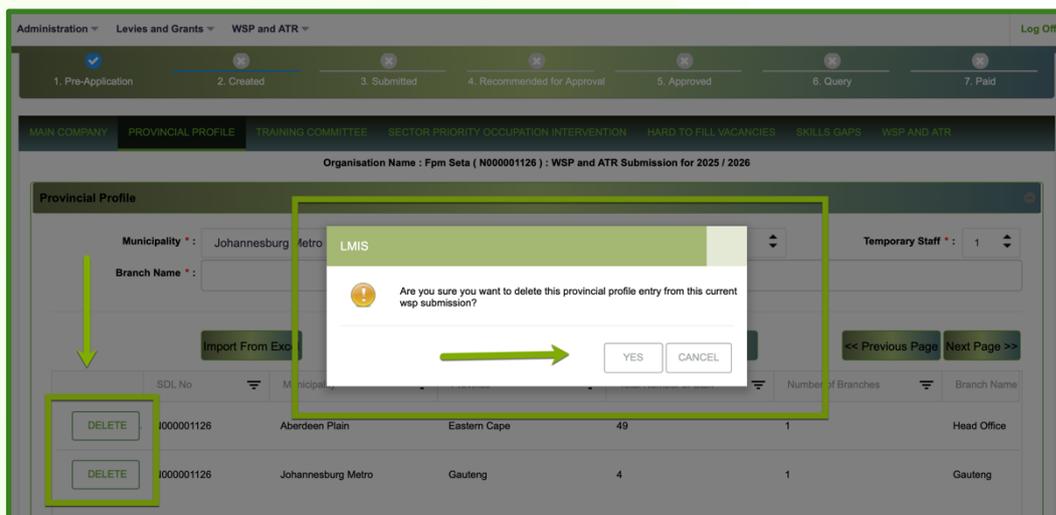


- iii. With all details supplied the system will add the branch and also confirms the successful addition of the branch data displaying the added record in the bottom section grid as below:

## LMIS User Guide – WSP & ATR Submissions SDF



- iv. The Provincial Profile grid provides the user with the following information
- **Municipality** - the municipality name where the branch is located
  - **Total Number of Permanent Staff** - the total number of staff at the branch in the province
  - **Total Number of Temporary Staff** – the total number of temporary staff at the branch in the province
  - **Branch Name** - the name of branch in the province
  - **Branch Contact Number** – the contact number for the branch
  - **Delete button**
    - The delete button allows the SDF to remove the branch from the WSP submission.
- v. If you want to remove the branch from the submission, click the **“Delete”** button and the system will ask user for confirmation to remove the branch as below:

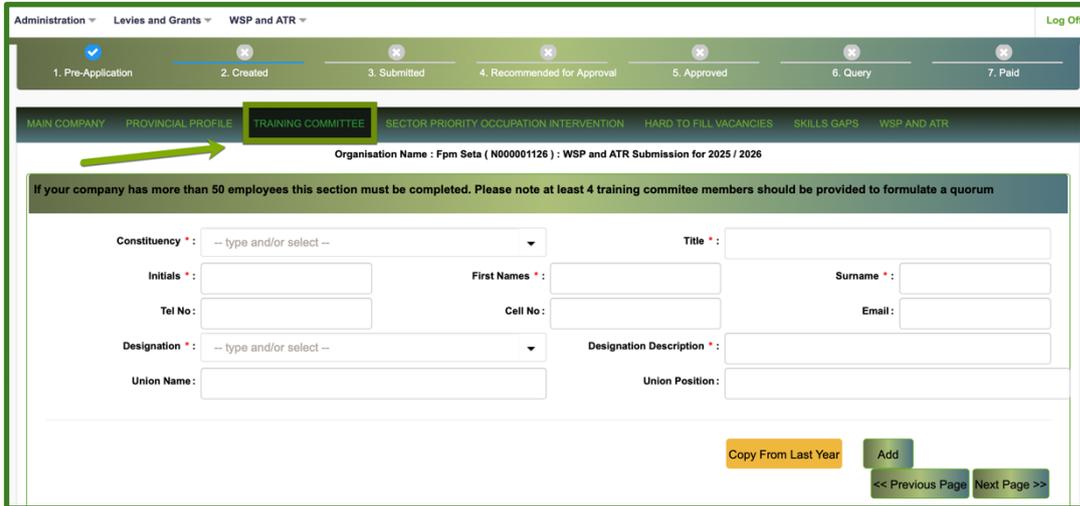


- Click **“Cancel”** button to abort the deletion process
- Click **“Yes”** button and the system will remove the branch details and confirm successful deletion.

## LMIS User Guide – WSP & ATR Submissions SDF

### 6.3 Training Committee

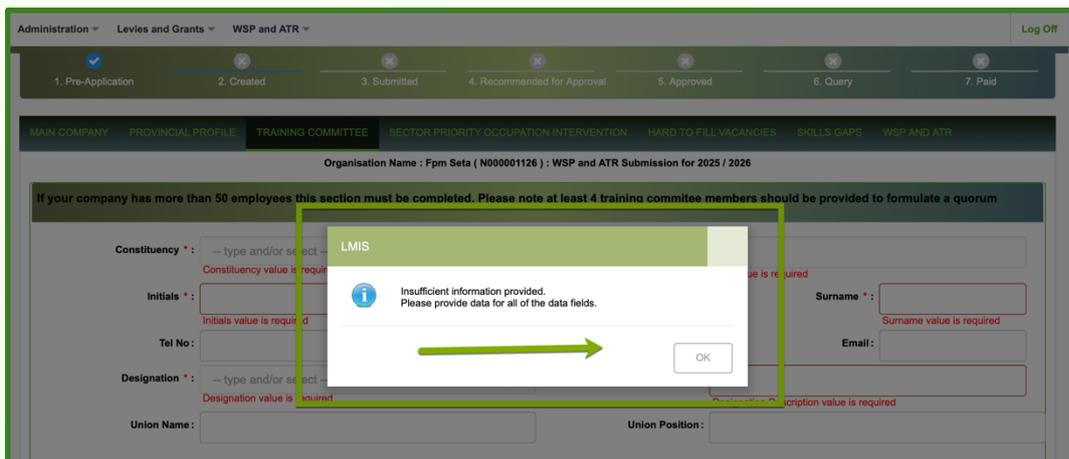
- i. This tab records on the training committee details and is mandatory for those companies that have more than **50 employees** otherwise the SDF can leave this section blank.



- ii. The screen allows the SDF to add the training committee details as below



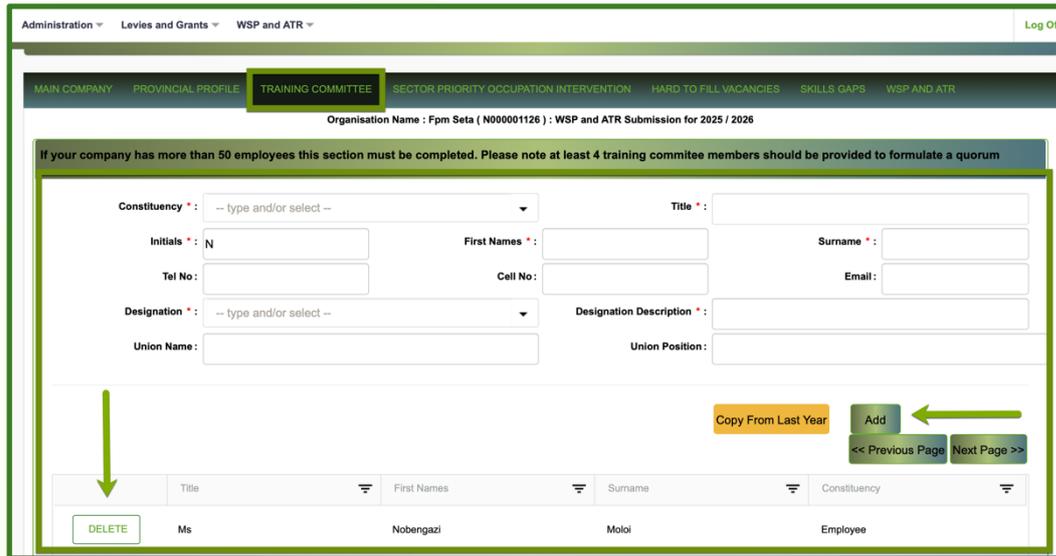
Attempting to click the **Add** button without specifying all the required training committee information will result in the system throwing an error message of incomplete data provided:



- iii. The grid provides the user with the following information
- Constituency
  - **Title** - the title of the committee member.
  - **Initials** – the initials of the committee member
  - **First Name** - the name of the committee member

### LMIS User Guide – WSP & ATR Submissions SDF

- **Surname** - the last name of the committee member
- **Designation** - the position of the member
- **Designation** – the description of the position held by the member
- **Add** button – this allows the SDF to add the training committee member to the submission.
- **Delete** button - the delete button allows the SDF to remove the committee member from the WSP submission.



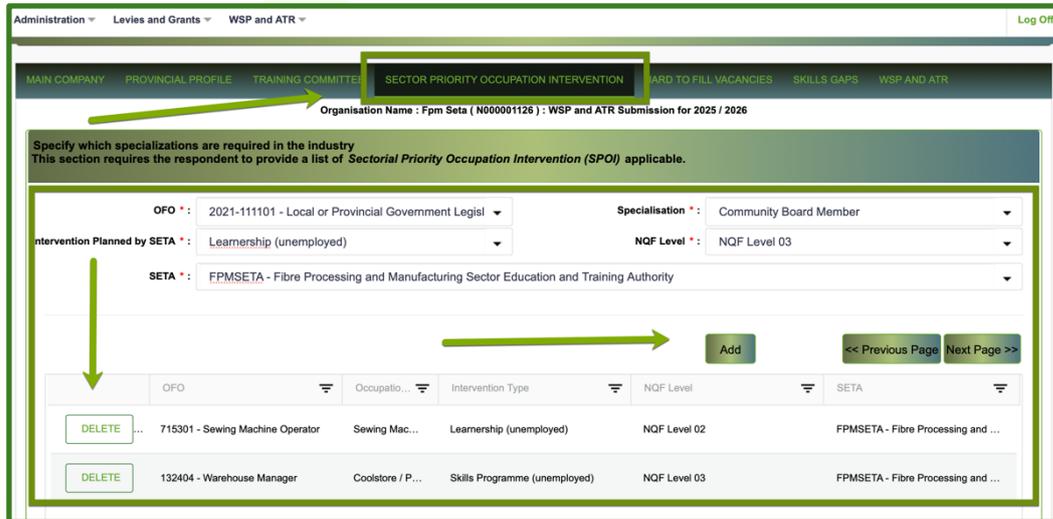
- iv. With all details supplied, the system will add the branch and also confirms the successful addition of the committee data displaying the added record in the bottom section grid.
- v. If you want to remove the committee member from the submission, click the “**Delete**” button and the system will ask user for confirmation to remove the branch.
- vi. Click “**Cancel**” button to abort the deletion process
- vii. Click “**Yes**” button and the system will remove the committee member and confirm successful deletion.

## 6.4 Sector Priority Occupation Intervention

- i. The grid provides the user with the following information:
  - **OFO** – Select the related classification from the list of occupations
  - **Specialisation** – Specify which specializations are required in the industry
  - **Intervention** Planned by SETA – Select the related intervention type
  - **NQF Level** – Select the NQF level
  - **SETA** – Select the SETA related to the occupation

## LMIS User Guide – WSP & ATR Submissions SDF

- Click **“Add”** button – this allows the SDF to add the occupation intervention.



Organisation Name : Fpm Seta ( N00001126 ) : WSP and ATR Submission for 2025 / 2026

Specify which specializations are required in the industry  
This section requires the respondent to provide a list of *Sectorial Priority Occupation Intervention (SPOI)* applicable.

OFO \* : 2021-111101 - Local or Provincial Government Legist      Specialisation \* : Community Board Member

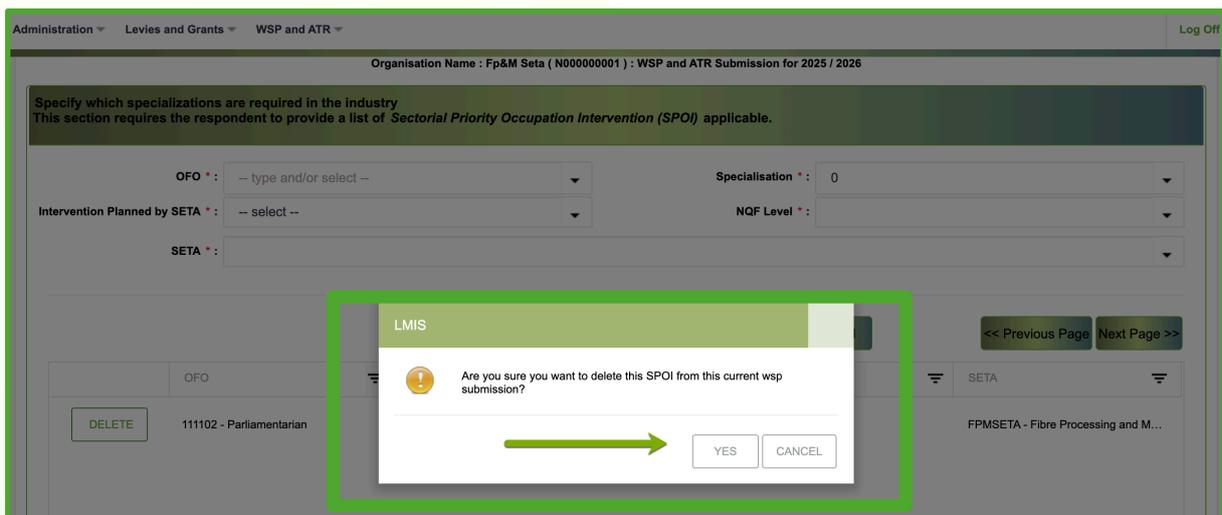
Intervention Planned by SETA \* : Learnership (unemployed)      NQF Level \* : NQF Level 03

SETA \* : FPMSETA - Fibre Processing and Manufacturing Sector Education and Training Authority

**Add**      << Previous Page    Next Page >>

	OFO	Occupatio...	Intervention Type	NQF Level	SETA
<b>DELETE</b>	715301 - Sewing Machine Operator	Sewing Mac...	Learnership (unemployed)	NQF Level 02	FPMSETA - Fibre Processing and ...
<b>DELETE</b>	132404 - Warehouse Manager	Coolstore / P...	Skills Programme (unemployed)	NQF Level 03	FPMSETA - Fibre Processing and ...

- Click **“Delete”** button - the delete button allows the SDF to remove the intervention from the SPOI intervention.



Organisation Name : Fp&M Seta ( N00000001 ) : WSP and ATR Submission for 2025 / 2026

Specify which specializations are required in the industry  
This section requires the respondent to provide a list of *Sectorial Priority Occupation Intervention (SPOI)* applicable.

OFO \* : -- type and/or select --      Specialisation \* : 0

Intervention Planned by SETA \* : -- select --      NQF Level \* :

SETA \* :

<< Previous Page    Next Page >>

**LMIS**


Are you sure you want to delete this SPOI from this current wsp submission?

→

	OFO	Occupatio...	Intervention Type	NQF Level	SETA
<b>DELETE</b>	111102 - Parliamentarian				FPMSETA - Fibre Processing and M...

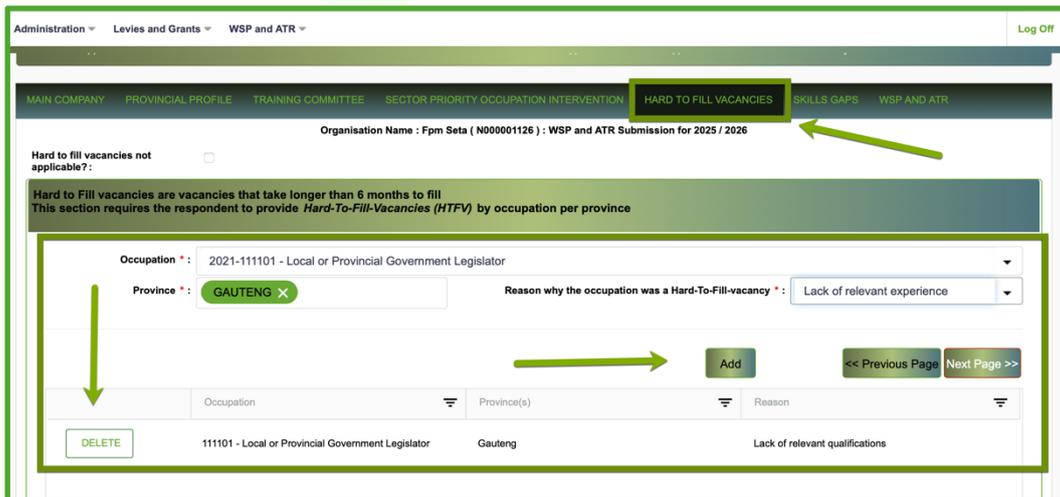
- ii. If you want to remove the committee member from the submission, click the **“Delete”** button and the system will ask user for confirmation to remove the branch.
- iii. Click **“Cancel”** button to abort the deletion process
- iv. Click **“Yes”** button and the system will remove the committee member and confirm successful deletion.

### 6.5 Hard to Fill Vacancies

- i. Hard to Fill vacancies are vacancies that take longer than 6 months to fill, this section allows the SDF to capture HTFV by occupation per Province. Deselect the check box if there are HTFV.

### LMIS User Guide – WSP & ATR Submissions SDF

- ii. The second is “Reason why the occupation was a Hard to Fill” the SDF clicks on the drop-down arrow and select the relevant field.
- iii. The first field is “Occupation” and is categorised by a six-digit figure (OFO Codes).
- iv. “Province”, this field further indicates as to which Province/s is the Hard to Fill Vacancy situated.
- v. If there is more than one Hard to Fill vacancy within the Entity, the SDF has the option to create more than one entry for HTFV, see below:

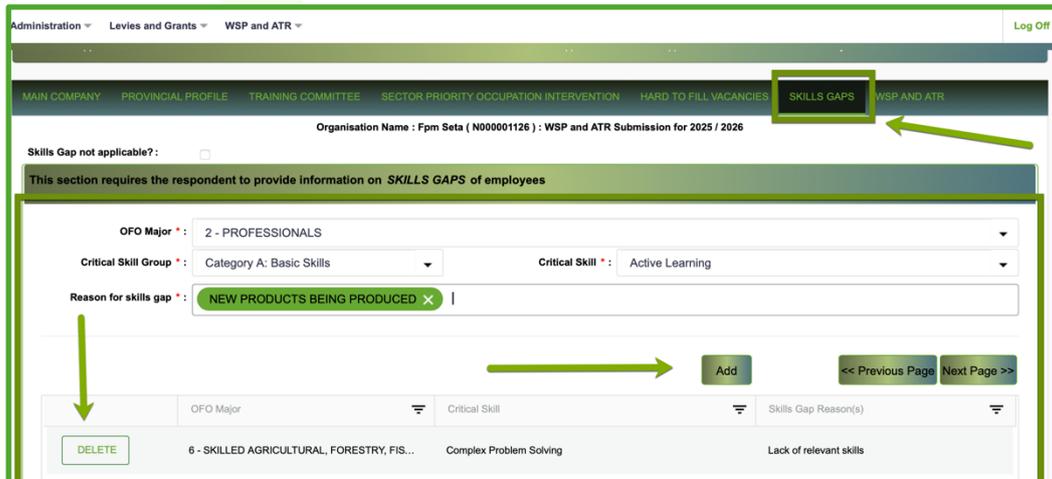


- “Add” button – this allows the SDF to add HTFV by occupation per province.
- “Delete” button the delete button allows the SDF to remove the added HTFV.

### 6.6 Skills Gaps

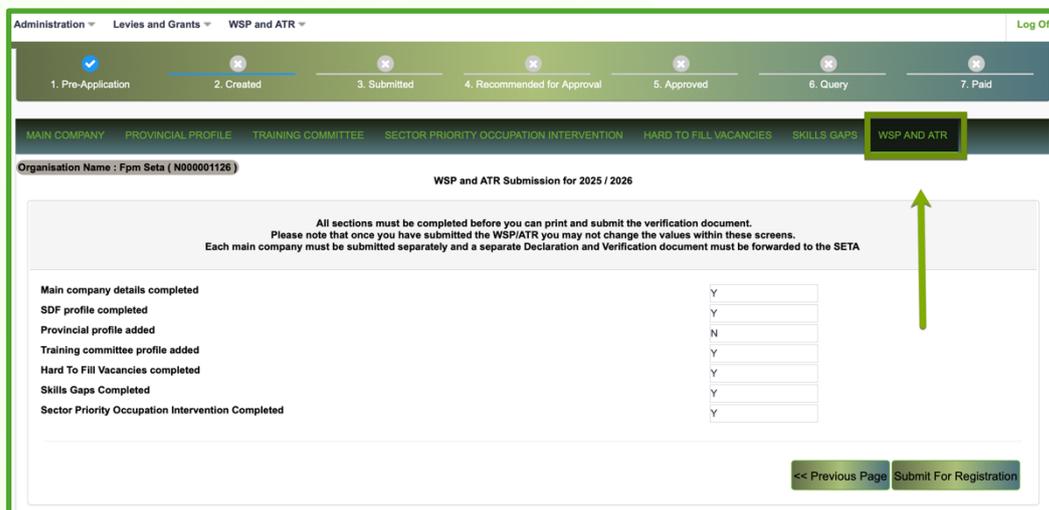
- i. The Skills Gap section of the WSP further indicates the Skills shortages within an Entity, there four mandatory fields that describes these skills gaps/ shortages.
- ii. The **OFO** (Organising Framework for Occupations) is a skill-based classification system, which encompasses all occupations in the South African context. The classification of occupations is based on a combination of skills levels and skills specialisation which makes it easy to locate a specific occupation within the Entity.
- iii. OFO Major is the main specialisation in most Entities.
- iv. The Critical Skills Group refers to capabilities needed within an Entity e.g ICT.
- v. The Critical Skill further describes the Skills Group. e.g. What is needed within ICT

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### 6.7 Declaration and Verification Document

- i. All sections must be completed before you can print and submit the verification document.
- ii. Please note that once you have submitted the WSP/ATR you may not change the values within these screens.
- iii. Each main company must be submitted separately and a separate Declaration and Verification document must be forwarded to the SETA



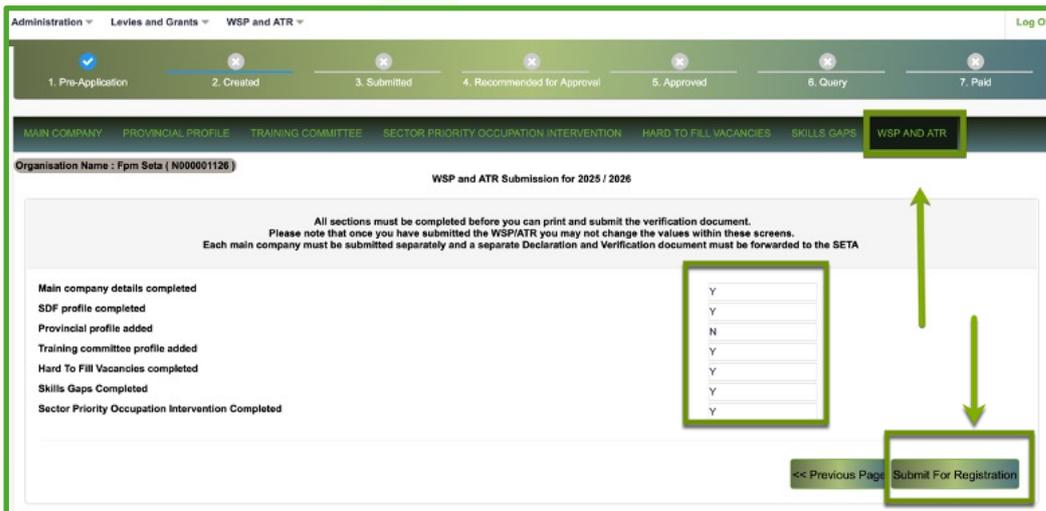
- iv. The Declaration and Verification Document consists of the following items:
  - **Submission Year** – the year that the WSP Submission is for
  - **SDL Number** – the entity’s registered SDL Number
  - **Trading Name** – the trading name of the entity
  - **Declaration** – the acknowledgement clause that states that the undersigned individuals are aware of the WSP submission and give consent to proceed.

### LMIS User Guide – WSP & ATR Submissions SDF

- **Signatures** – this section provides space for the responsible persons to write their full names and signatures based on their positions as outlined by the document.

## 6.8 Submit Application

- i. This step is a post check, it indicates and confirms that all the TAB's have been completed successfully.



- ii. To submit the application the SDF would have had gone through the below six steps:

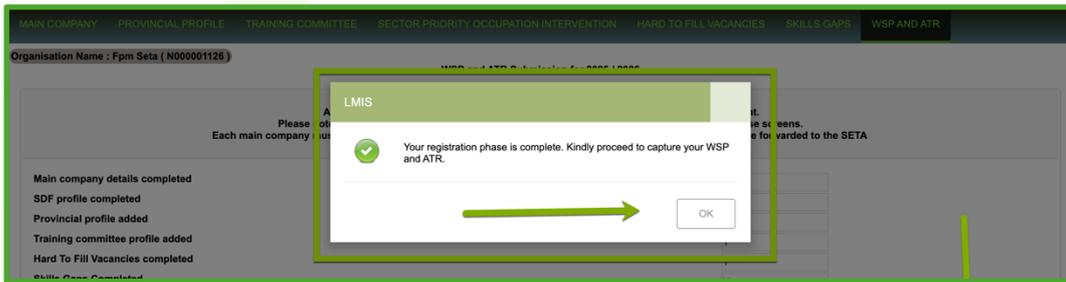
- Main company details completed.
- SDF profile.
- Provincial profile.
- Training committee profile.
- Hard To Fill Vacancies.
- Skills Gaps.
- Sector Priority Occupation Intervention.

- iii. If all these steps are completed successful, they will be indicated with a **Y** status and the only **N** that will be an exception is when the Entity has less than 50 employees and the Training Committee will have an **N** status.

- iv. Once everything is done, the SDF may proceed by clicking the “**Submit For Registration**” button located at the bottom right of the window.

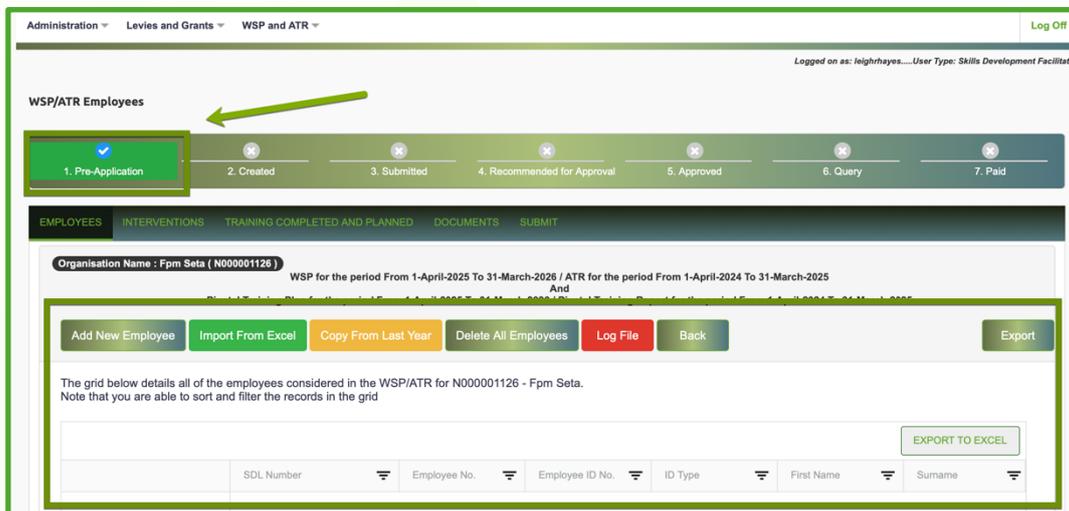
- v. After the “**Submit For Registration**” button has been selected the registration phase is completed.

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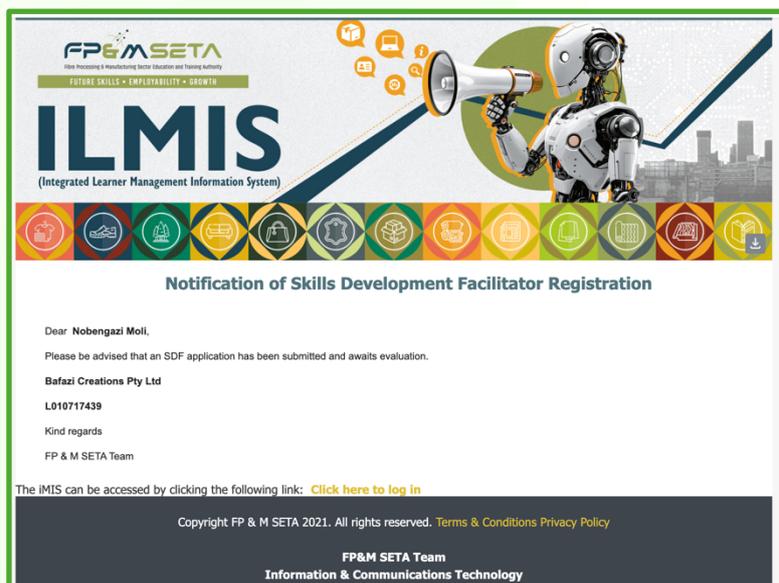


### 7. Capture WSP & ATR

- i. Following the successful submission of the Company Registration, the system will automatically navigate to the “WSP/ATR Employees” page as shown below:

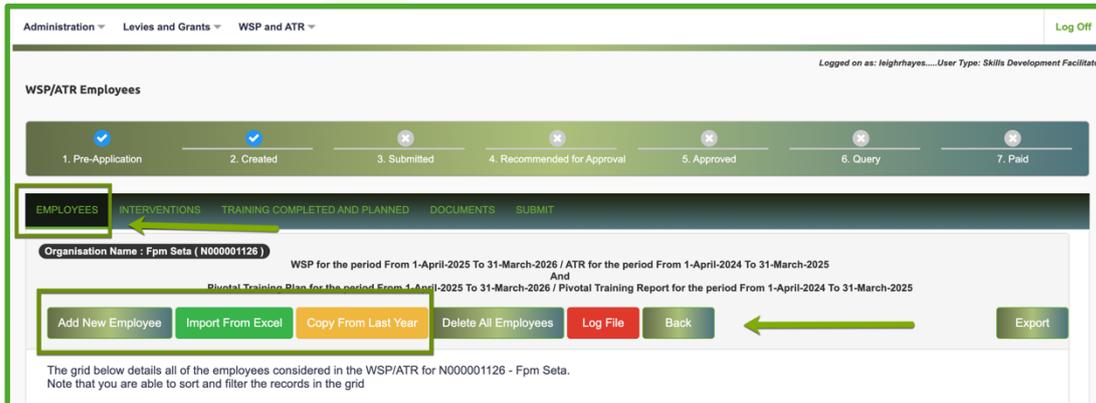


- ii. The system also generates and sends an “Acknowledgement” email to the SDF with instructions on the process going forward, as below:



### LMIS User Guide – WSP & ATR Submissions SDF

- iii. The SDF captures employees using the first tab and it allows capturing the employees concerned with the plan and the training report. Employees can be captured via 3 methods that is: manually, importing from previous year WSP or importing from an excel spreadsheet that follows the supplied template by the SETA, as highlighted below:



#### 7.1 Manual Capture

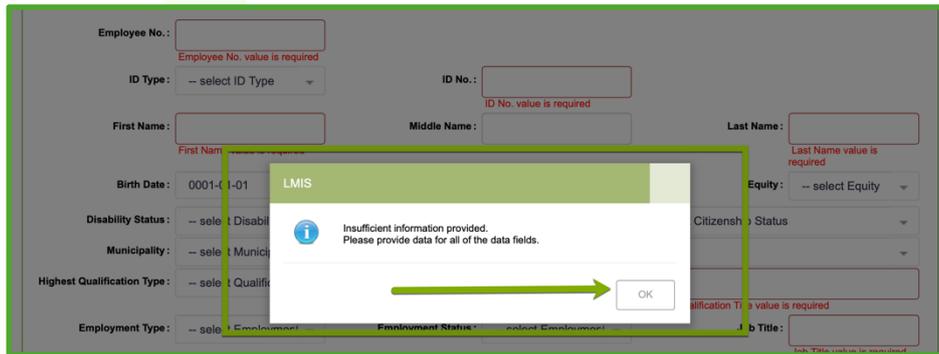
- i. Click the **“Add New Employee”** button. The system will insert an inline capturing filed to fill in the WSP Employee form as below:

- ii. Clicking the **“Cancel”** button will abort the adding of the employee.
- iii. Clicking the **“Save”** button will save the employee details.

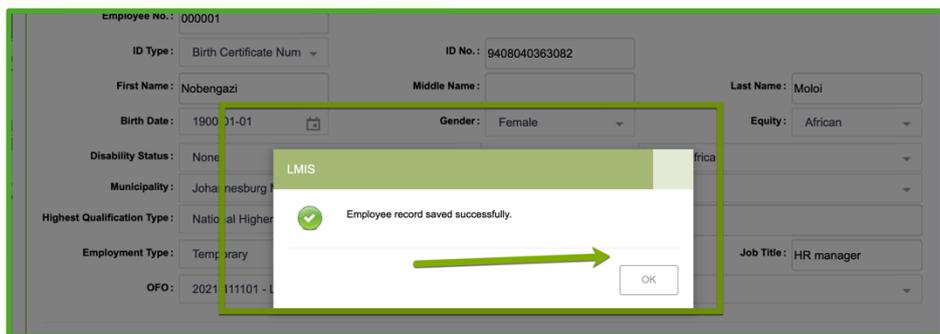


**Attempting to save a new employee without all the required fields supplied will result in an error reminding user to supply all required (also marked in RED) fields as below:**

### LMIS User Guide – WSP & ATR Submissions SDF

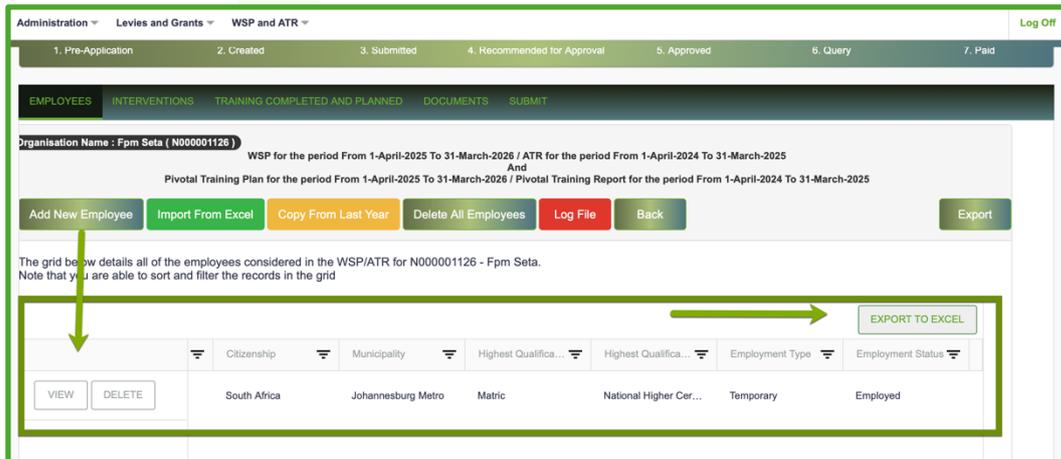


- iii. Click on “**Add New Employer**” to capture employee details, the rest of the fields which are all required (with only the exception of the “Middle Name”) and then click on the “**Save**” button. A success message will appear as below:



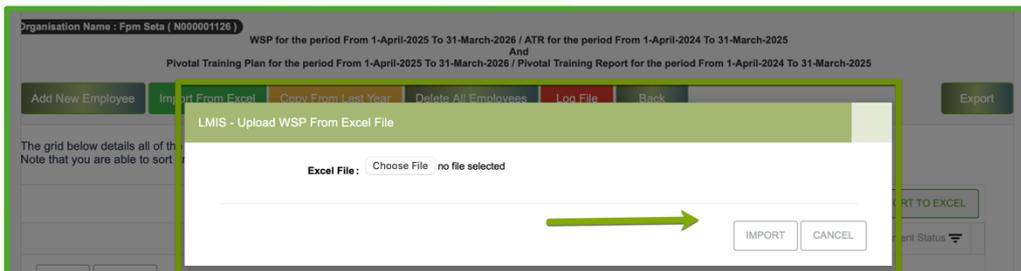
- iv. The system will save the employee and display a successfully saved record message and load the employees grid shown above:
- **Employee Number** – the employee number as on the payroll books
  - **Employee ID** - type
  - **Employee ID** - name of the employee
  - **SDL Number** - the levy number of
  - **Gender** – the sex of the employee the
  - **Birth Date** – the date of birth for the
- v. **Delete/View Export** buttons - the grid allows the SDF to view the captured employee record and thus facilitate some editing of the record if necessary, this can be done by clicking on the information. The system will allow you to edit the data.
- vi. Click the “**View**” button and the system will load the editable employee record.
- vii. The export button exports the filtered contents of the grid into an Excel format file.

## LMIS User Guide – WSP & ATR Submissions SDF



### 7.2 Import From Excel

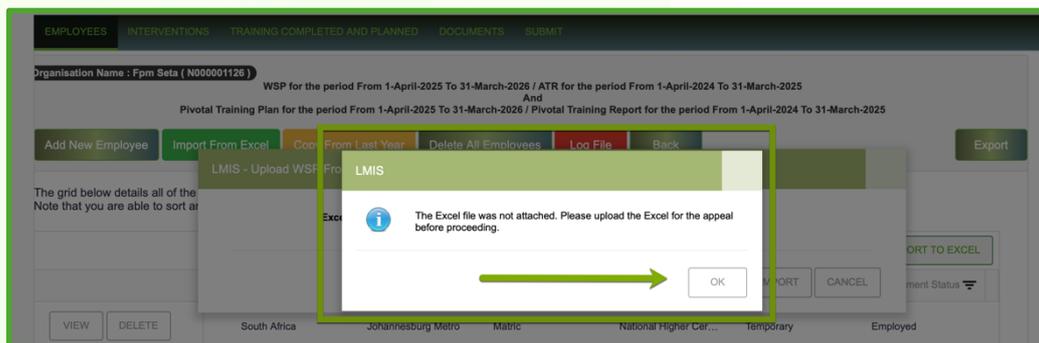
- i. Click the **“Import From Excel”** button, the system will launch the Import form as shown below:



- ii. Click the **“Cancel”** button will abort the copy process.



Attempting to import without specifying the import file will result in an error that an excel file needs to be specified as below:

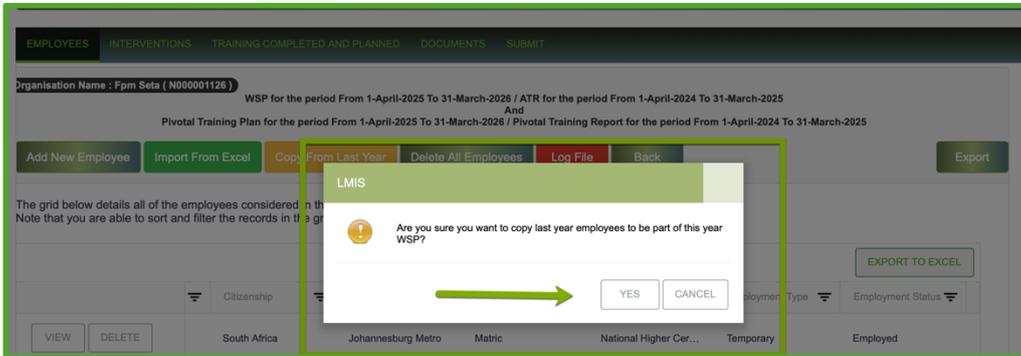


- iii. Attach the file to import and then click the **“Import”** button. The system will check the validity of the file and the expected format. If the file passes the tests, the system will import the records and load the respective grids for the WSP and ATR.

## LMIS User Guide – WSP & ATR Submissions SDF

### 7.3 Copy from previous year/last year

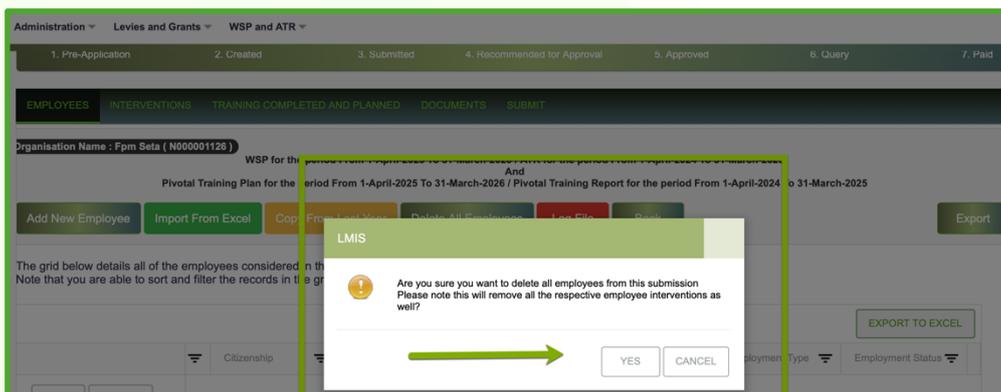
- i. Click the **“Copy from Last Year”** button. The system will launch the Copy form as below:



- ii. Clicking the **“Cancel”** button will abort the copy process, click on the **“Yes”** button and the system will check if a previous submission exists. If last year's employee records exist, the system will proceed to migrate the employees to the current WSP submission. If it doesn't exist, the system will return a message that no previous records exist.
- iii. Copied records are loaded on the employee's grid.

### 7.4 Delete All Employees

- i. This button allows the SDF to delete all captured Employee records. When the user clicks on the **“Delete All Employees”** button, the system generates a confirmation pop-up message as below:

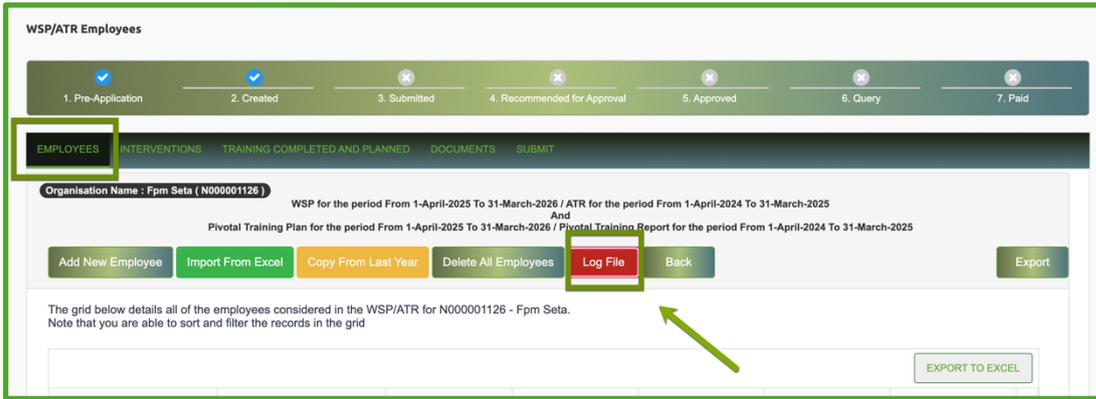


- ii. Clicking on the **“Yes”** button proceeds to erase all employee records in the grid, as below. To abort this action, the SDF clicks on the **“Cancel”** button.

### 7.5 Log File

- ii. This button allows the SDF to download all captured records on a spreadsheet.

## LMIS User Guide – WSP & ATR Submissions SDF

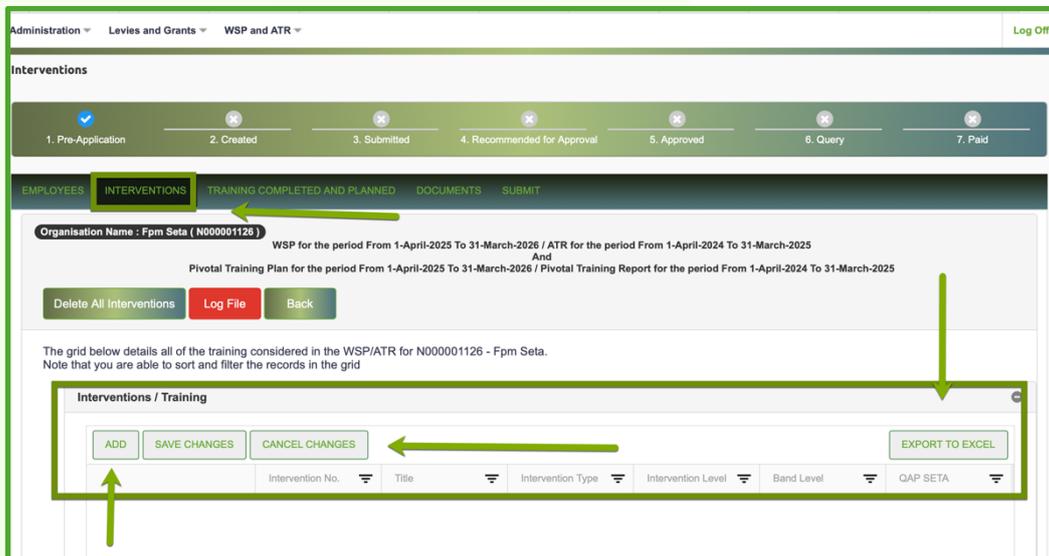


- iii. When the user clicks on the “**Log File**” button, the system generates a spreadsheet with all the errors as shown below:

RECORD TYPE	FILENAME	SUPPLIED ID NO	SUPPLIED EMPLOYEE LAST NAME	SUPPLIED EMPLOYEE FIRST NAME	SUPPLIED INTERVENTION NO	ROW NO	MESSAGE
Employee Record	6501235022085	GOODWIN	BARRY			4	Rejected - An employee
Employee Record	0305040086089	LOUMEAU	KAREN			5	Rejected - An employee
Employee Record	0003105452089	VAN DER MERWE	WILLIAM			6	Rejected - An employee
Training Intervention Record			BUSINESS PRESENTATION SKILLS	E112		14	Rejected - No Band Level
Training Intervention Record			BUSINESS PRESENTATION SKILLS	E112		14	Rejected - Incorrect SDL
Training Intervention Record			WELDING	E112		15	Rejected - No Band Level

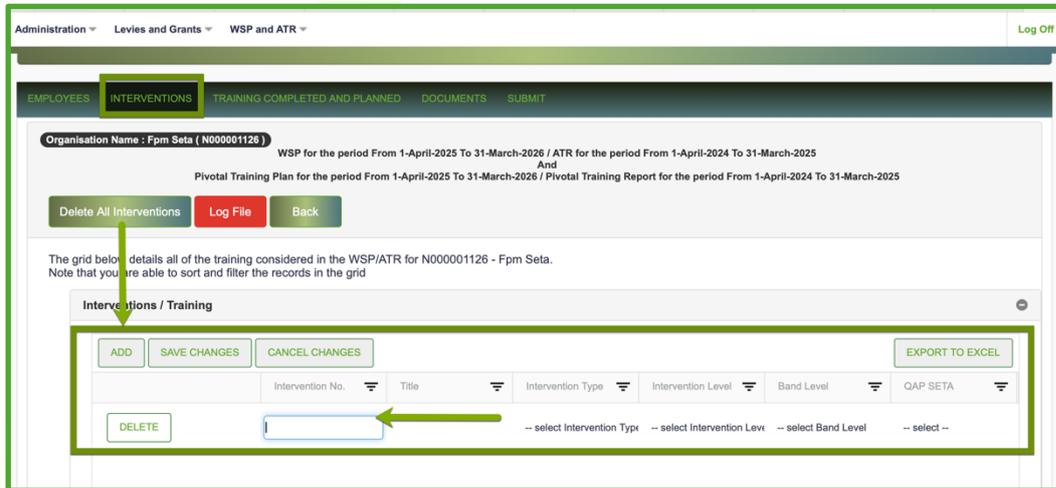
## 8. Interventions

- i. This is done on the 2nd tab (Interventions) and allows capturing the interventions that are going to be done for the plan and what has already been trained on. Click the “**Add**” Intervention tab and the system will load the interventions page as shown below:

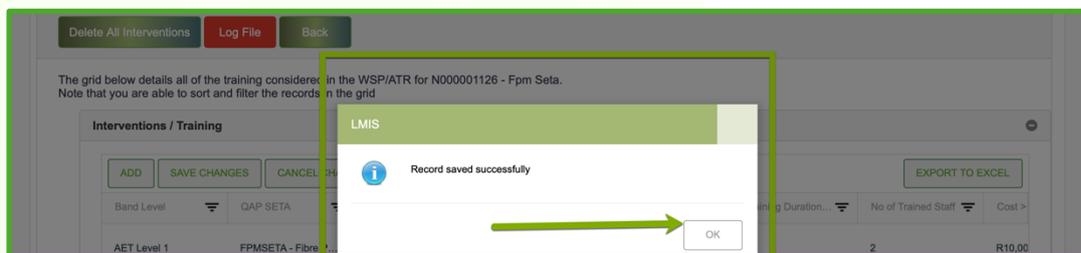


## LMIS User Guide – WSP & ATR Submissions SDF

- ii. Click the **“Add”** Intervention button. The system will insert an inline input field to capture the information as below:



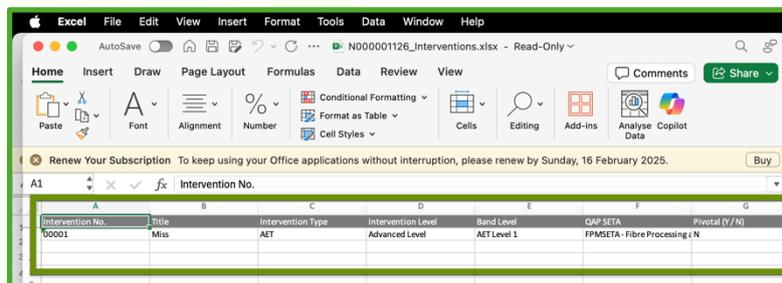
- iii. Clicking the **“Cancel”** button will abort the adding of the intervention.
- iv. When capturing an Intervention, select **“Add”** Intervention and supply all the required fields and click on the **“Save”** button. The system will save the intervention and display a **“Successfully Saved Record”** message and load the interventions:



- v. The grid provides the user with the following information
- **SDL Number** – the Main Company’s Levy Number
  - Intervention Number – the intervention number for the training
  - **Title** – the training title
  - **Intervention Type** – how the training is going to be conducted or was conducted
  - **Level** – the level for the course
  - **Band Level** - the classification level for the course in terms of NQF levels
  - **Cost** – the cost of conducting the course
  - **Delete/View/Export** buttons
  - The **View** button allows the SDF to see the information captured for an intervention and thus facilitate some editing of the record if necessary.

### LMIS User Guide – WSP & ATR Submissions SDF

- The **Delete All Interventions** button allows the SDF to remove the interventions from the WSP Submission.
    - The **Export button** downloads and saves the intervention information in Excel format.
  - Click the “**Delete**” button and the system will warn the user that deleting the interventions will wipe out the employee interventions as well.
  - Click “**Cancel**” to abort the deletion or Click “**Yes**” to delete record which is confirmed by the message.
- vi. The grid shows the information of the intervention record.
- vii. The “**Export**” button exports the filtered contents of the grid into an Excel format file as shown below:

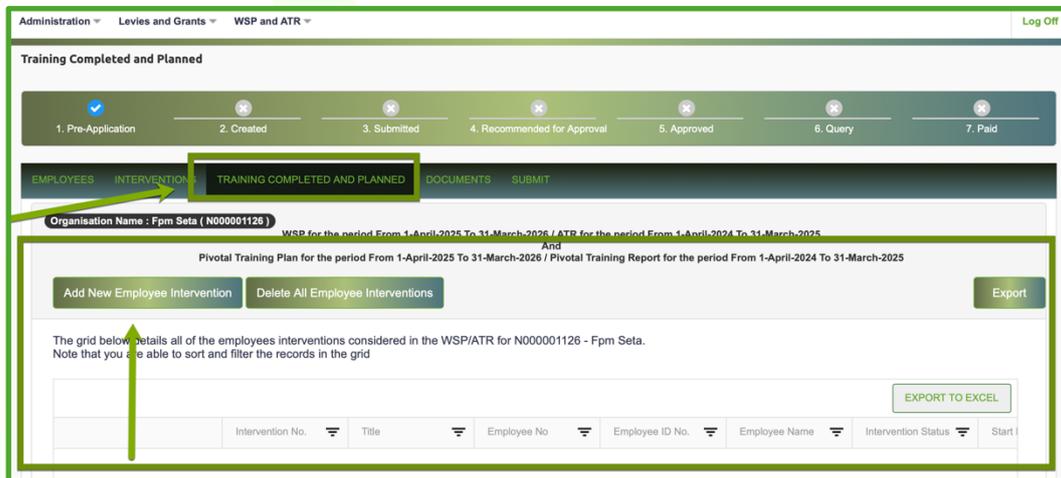


- x. The grid provides the user with the following information:
  - **SDL Number** – the Main Company’s Levy Number
  - **Intervention Number** – the intervention number for the training
  - **Intervention Title** – the training title
  - **Intervention Type** – how the training is going to be conducted or was
  - **Intervention Level** - the classification level for the course in terms of NQF levels conducted
  - **Band Level** - the classification level for the course in terms of NQF levels
  - **QAP SETA** - Quality Assessment Partner Sector Education and Training Authority
  - **Pivotal** – Yes or No
  - **External** – Choose whether the intervention is external
  - **Apply for Discretionary** – Yes or No
  - **Training Duration** – days of the training duration
  - **Number of Trained Staff** – total number of trained staff
  - **Intervention Cost** – the cost of conducting the course

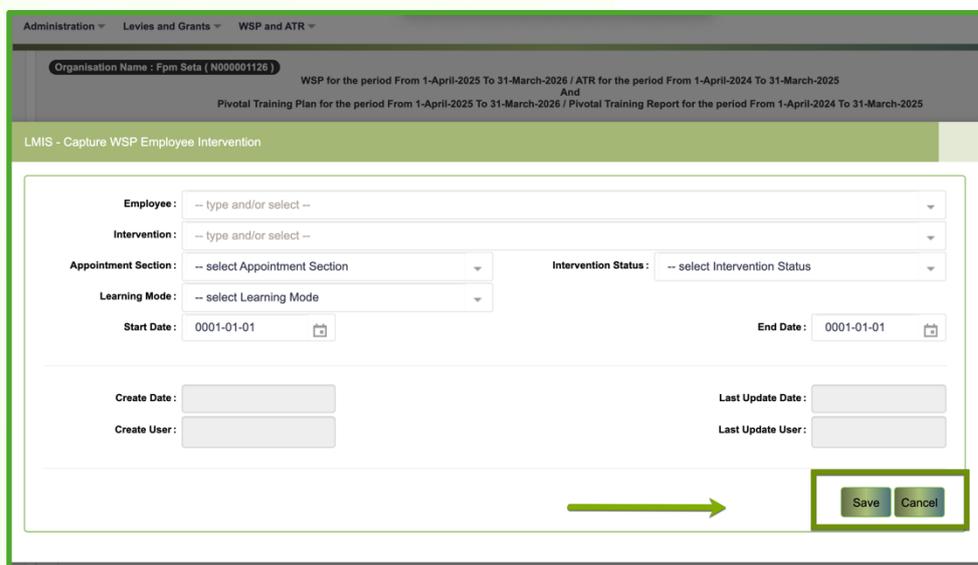
## LMIS User Guide – WSP & ATR Submissions SDF

### 9. Training Completed and Planned

- i. This is done on the 3rd tab and allows capturing the employee interventions that are going to be done for the plan and what has already been trained on.



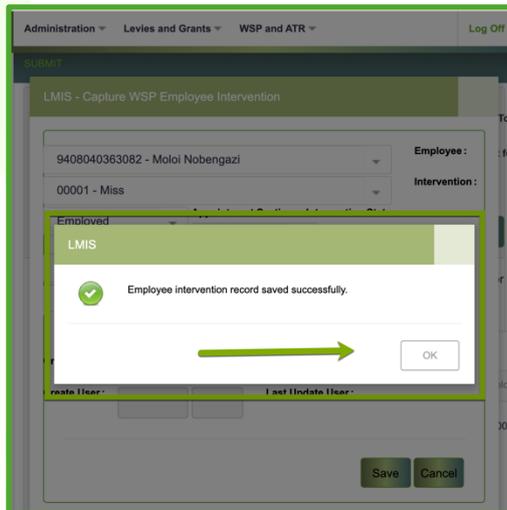
- ii. Click “Add New Employee Intervention” the system will insert an inline input field to capture employee details as shown below:



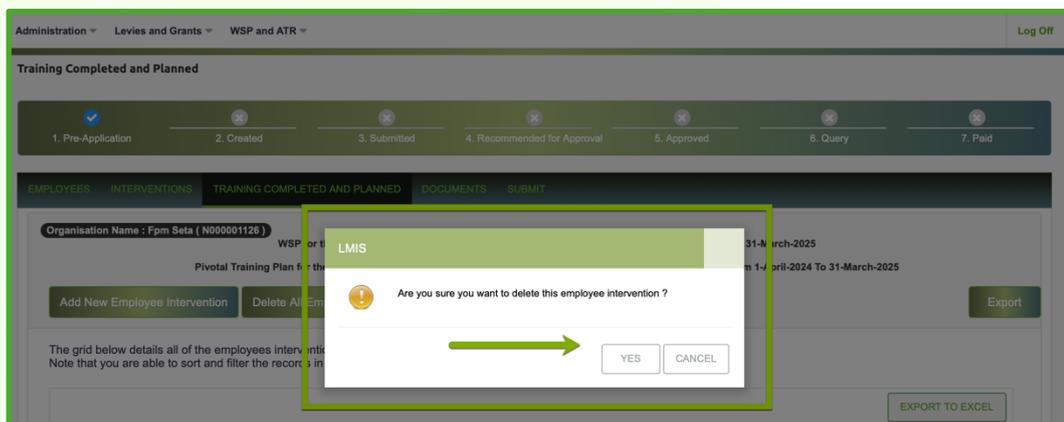

**Attempting to save a new employee intervention without all the required fields supplied will result in an error reminding user to supply all required fields.**

- iv. Enter the Intervention, Employee, Start Date and End Date, Appointment Section, Intervention Status and Learning Mode details and then click the “Save” button. The system will save the intervention and display a “Successfully Saved Record” message and load the employee interventions grid as below:

## LMIS User Guide – WSP & ATR Submissions SDF

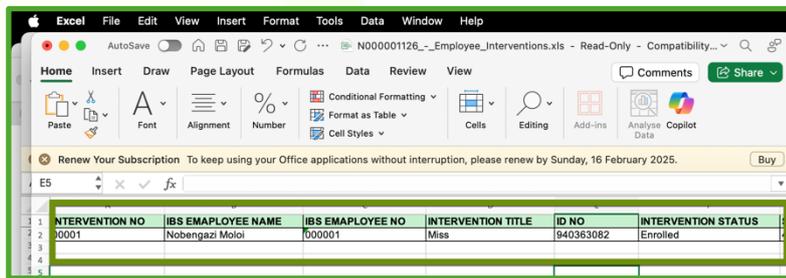


- v. The “**Training Completed and Planned**” grid provides the user with the following information:
- **Intervention Number** – the intervention number for the training
  - **Employee Number** – the employee number belonging to the Employee
  - **Employee ID Number** – the legal identity number belonging to the Employee
  - **Employee Name** – the legal name of the employee
  - **Intervention Status** – an indicator of the progress of the learner on the intervention
  - **Start Date** - the training start date
  - **End Date** - the end date for the intervention
  - **Learning Mode** – how the intervention is being administered
  - **Appointment Section** – the appointment section for the intervention
  - **Delete/View/Export** buttons
    - The delete button allows the SDF to remove the employee intervention from the WSP Submission
- vii. Click the “**Delete**” button and the system will warn the user that deleting the employee will wipe out the employee interventions as well as seen below:



## LMIS User Guide – WSP & ATR Submissions SDF

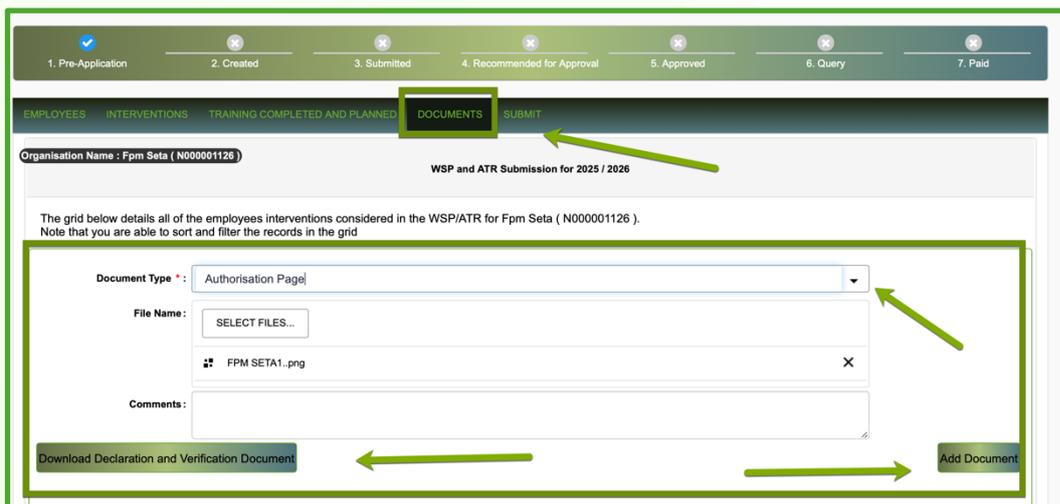
- viii. Click **“Cancel”** to abort the deletion and Click **“Yes”** to delete record which is confirmed by record deleted successfully message.
- ix. The **“View”** button allows the SDF to view the captured employee intervention record and thus facilitate some editing of the record if necessary.
- x. Click the **“View button”** and the system will load the employee intervention record.
- xi. Once the editing process is completed, the SDF clicks on the **“Save”** button.
- xii. The **“Export”** button saves the filtered contents of the grid into an Excel format file as below:



- xiii. The SDF may continue to save or print the Excel File.

## 10. Documents

- i. The Documents TAB allows the SDF to upload three types of documents:
  - Authorisation Page
  - Proof of banking details (Cancelled Cheque or Signed Stamped bank letter)
  - Training Committee Minutes



## 11. Submit

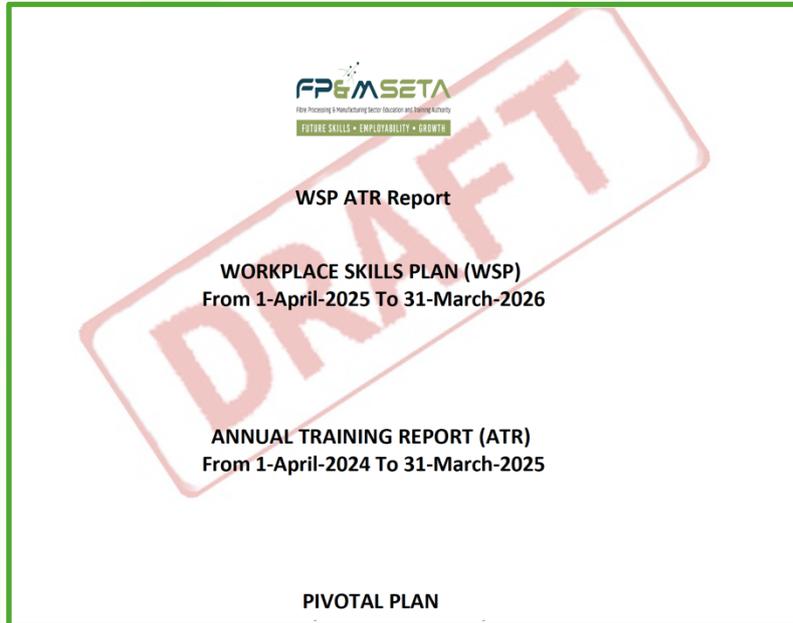
- i. This button marks the end of the SDF WSP/ATR submission process. This allows the user to view a summary of the information captured, as shown:

## LMIS User Guide – WSP & ATR Submissions SDF

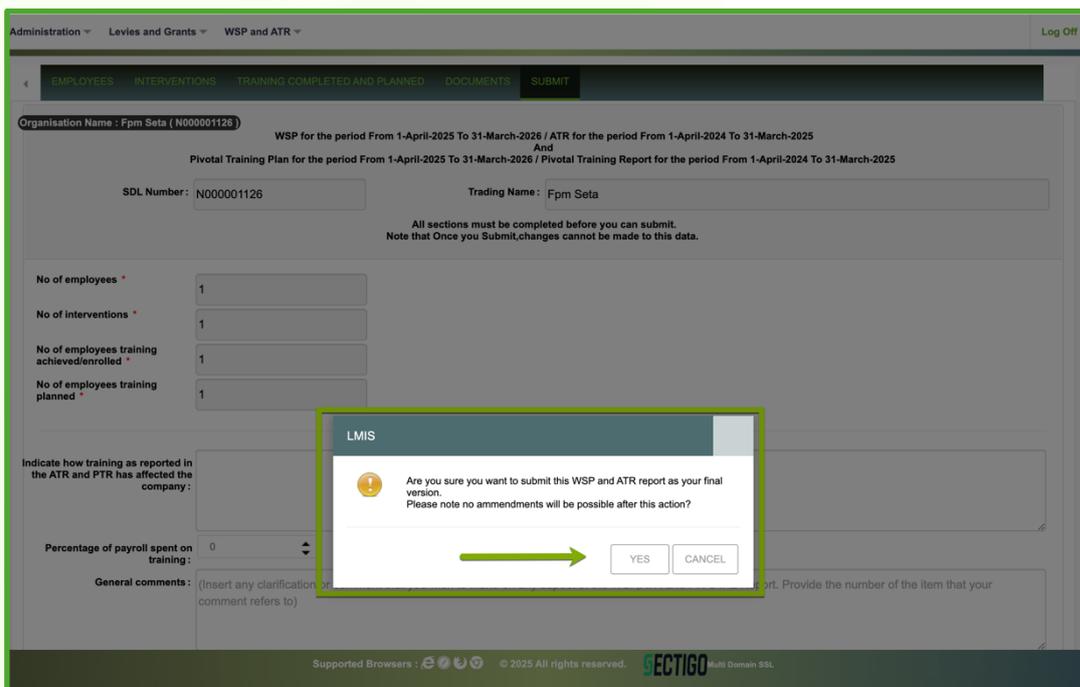
- ii. This page provides the user with the following information:
  - The number of employees uploaded.
  - The number of interventions
  - The number of employees training achieved and enrolled
  - The number of employees training planned
- iii. Submit final WSP and ATR button – this button allows the SDF to submit WSP and ATR

### LMIS User Guide – WSP & ATR Submissions SDF

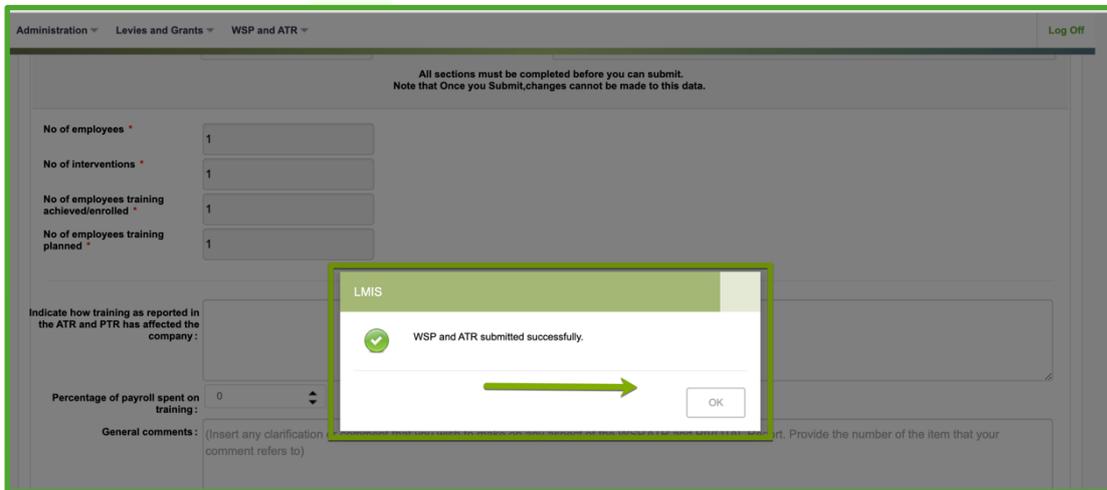
- iv. Print WSP & ATR button – this button allows the SDF to download and print the captured WSP/ATR as shown below:



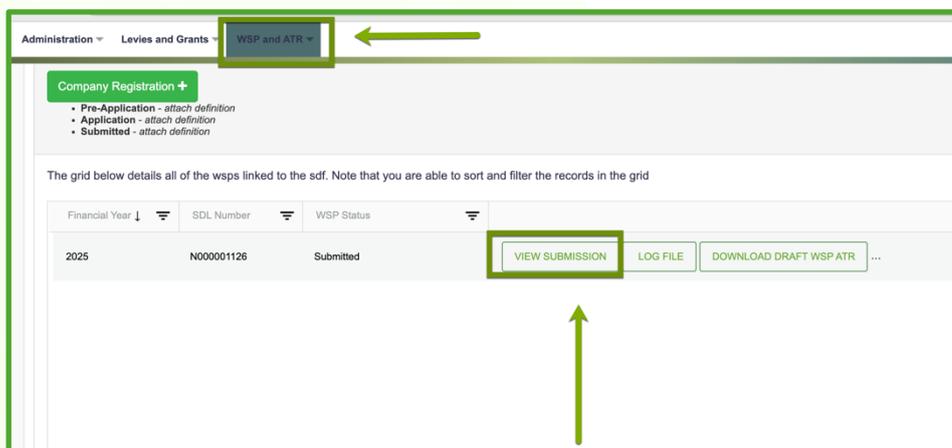
- v. Once the SDF is satisfied with the contents of the WSP/ATR submission, they proceed to click on “**Submit WSP and ATR**”. The system then generates a warning message informing the user that the submission is final and the user will not be able to make any more changes to the submission, as shown below:



- vi. If all the required data has been captured, the system proceeds to submit the WSP and ATR and presents a success message, as below:



- vii. The user continues to click on "OK" to proceed. The system navigates back to the SDF Details page.
- viii. To view the submission status, the SDF will navigate to the "WSP Summary" tab as shown below:

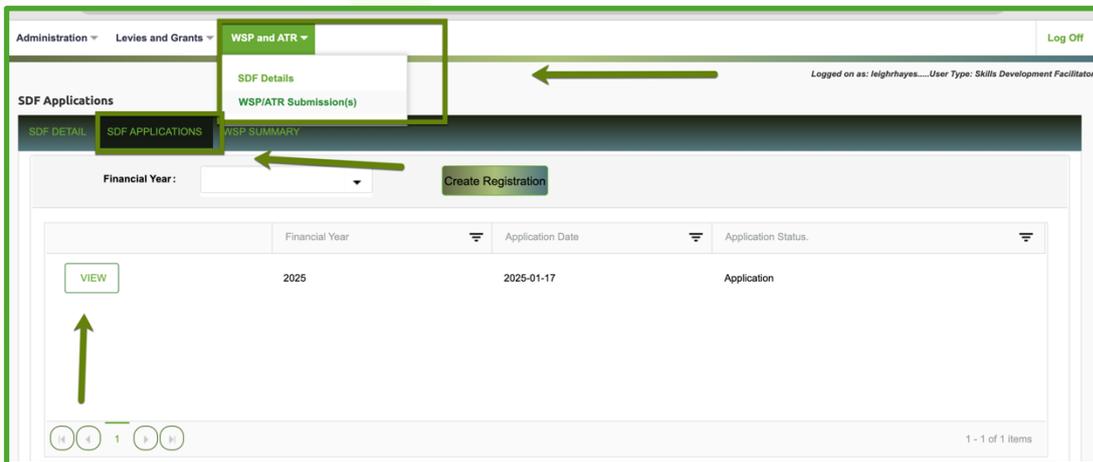


- ix. The summary grid allows the SDF to view their submissions, submission status as well as their associated Log Files. The grid provides the "Submission Financial Year, Main Company SDL Number and WSP Status".
- x. The "WSP Status" highlights where in the FPM & SETA review process the SDF's application is - this is used to monitor progress on an application.

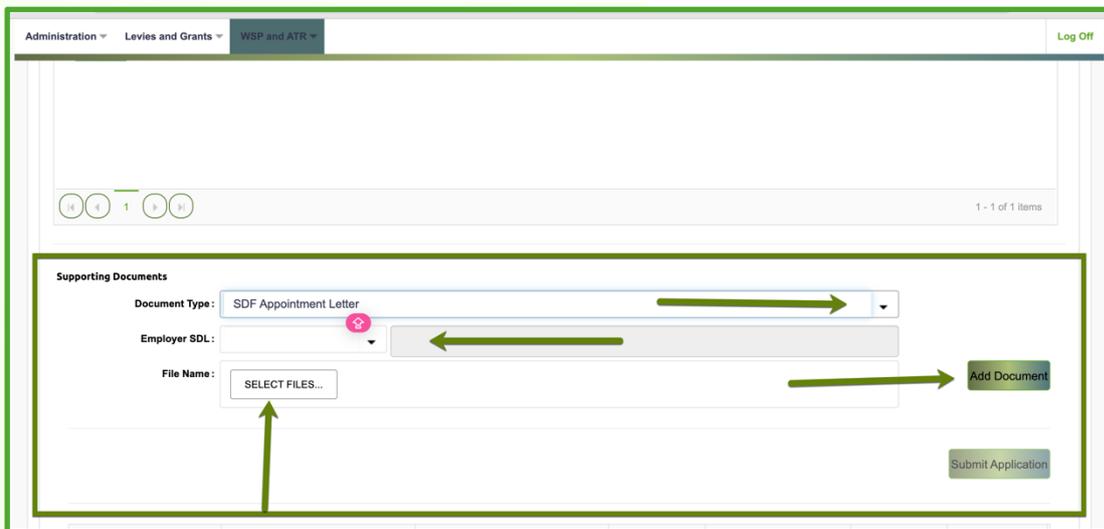
## LMIS User Guide – WSP & ATR Submissions SDF

### 12. Secondary SDF Approval

- i. Once SDF has submitted the application and FPM & SETA approves the application, this will allow the capturing of a Secondary SDF.
- ii. To capture the Secondary SDF, the SDF will navigate to “**SDF Application**” tabs as shown below:



- iii. Click “**View**” button to upload the Secondary SDF, the Support Documents screen will allow SDF to upload Appointment Letter as shown below:



#### 12.1 Supporting Documents

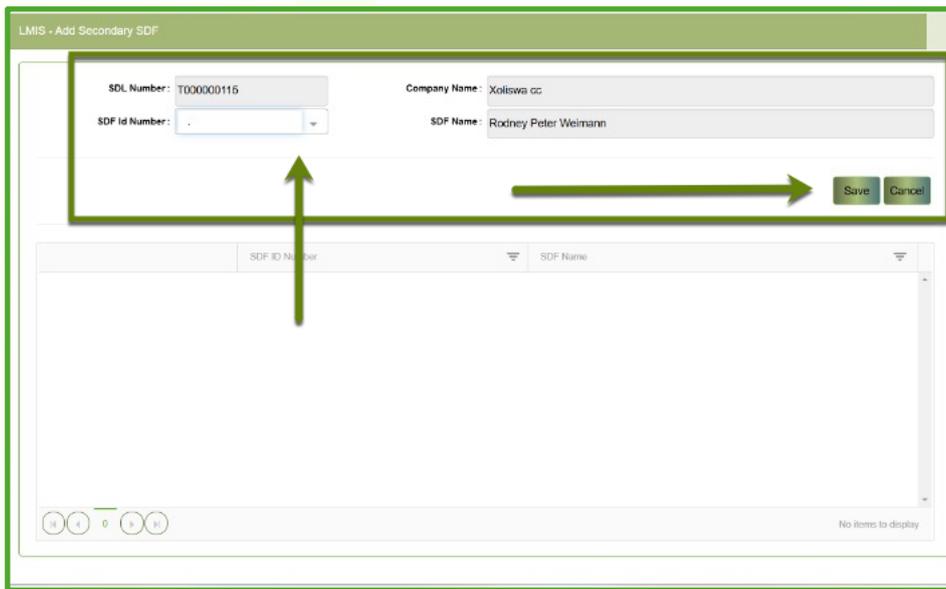
- i. **Document Type:** Upload the Appointment Letter, Appointment Letter will only be received once SDF has successfully submitted the application and has been approved by FPM & SETA.
- ii. **Employer SDL:** Insert the correct SDL number as per SDF application.
- iii. **File Name:** Select the Appointment Letter from your files.
- iv. **Add Document:** Add the file by clicking the “**Add Document**” button.

### LMIS User Guide – WSP & ATR Submissions SDF

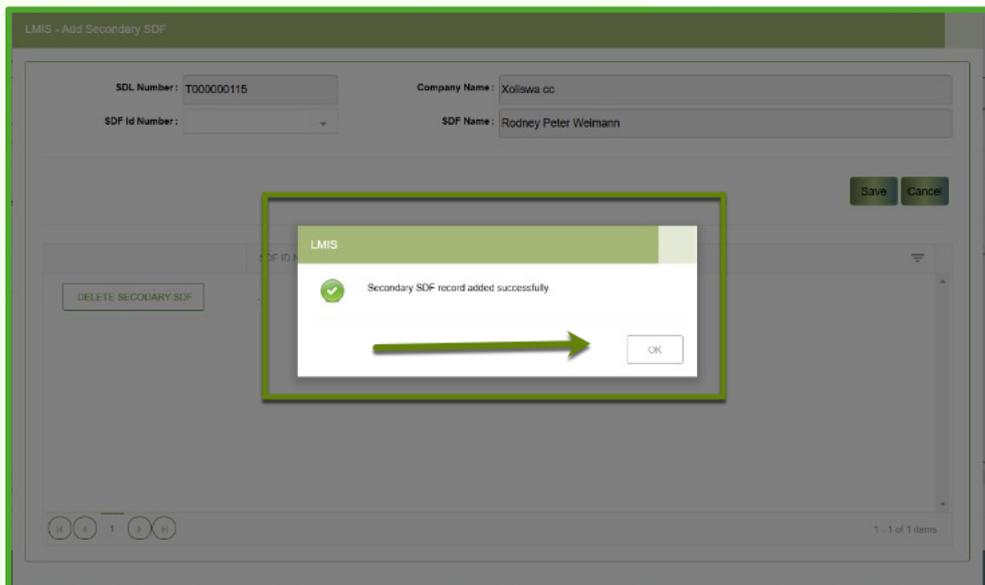
- v. **Submit Application:** Once the document has been upload, SDF can continue to click the **“Submit Application”** button to wait for approval.

#### 12.2 Add Secondary SDF

- i. Click **“Add Secondary SDF”**, (this button will only be available to SDF once the application of uploading an Appointment Letter has been approve by FPM& SETA.
- ii. Capture the Secondary SDF ID Number as shown below:



- iii. Clicking on the **“Save”** button proceeds to save Secondary SDF records in the grid, as shown below. To abort this action, the SDF clicks on the **“Cancel”** button.
- iv. After saving the Secondary SDF a successful message will display as shown below:



### LMIS User Guide – WSP & ATR Submissions SDF

- v. Once the Secondary SDF has been successfully saved, you will be able to delete the SDF by clicking the **“Delete Secondary SDF”** button as shown below:

The screenshot displays the 'LMIS - Add Secondary SDF' interface. At the top, there are input fields for 'SDL Number' (T000000115), 'Company Name' (Xoliswa cc), 'SDF Id Number' (empty dropdown), and 'SDF Name' (Rodney Peter Weimann). Below these fields are 'Save' and 'Cancel' buttons. A table below contains one row with columns for 'SDF ID Number' and 'SDF Name'. The 'SDF Name' column contains the text 'Rodney Weimann'. A button labeled 'DELETE SECONDARY SDF' is located in the first column of this row, highlighted with a green rectangular box. A green arrow points from this box to the right. At the bottom of the table, there are navigation icons and the text '1 - 1 of 1 Items'.

**END**