MIS IMPLEMENTATION

DISCRETIONARY GRANTS TRAINING GUIDE
Version 1.0 Draft

1   Document Review

The document described herein is agreed to by key team members and by signing this document;

The project members confirm their support of the Training guide content.

Name	Title	Signature	Date
Tshembani Maluleka	IT Manager		
Henry Goliath	PMO Manager		
Ivy Pilane	Project Manager		
Malindi Madumo	Change Manager		

Version Control

Date	Version	Summary of changes	Amended by
12 January 2021	1.0	Draft	Malindi Madumo

Table of Contents

2   Introduction

This is a Training manual for the new MIS System for the Insurance Sector Education and Training Authority (INSETA). The system provides the organisation with an easy and timeous process to administer Discretionary Grants.

2.1   Objective

The objective of this training manual is to provide a step-by-step guide on how to execute the following processes on the system:

- Trigger the DG window and a WSP is submitted
- Enable evaluations of submitted applications
- Enable site visit data to be capture
- Enable approvals
- Send notifications and reminders
- Generate Recommendation/ Allocation letters
- Keep an audit trail
- Enable an upload of an advertisement
- Ability to add programmes and allocate budget
- Generate reports and dashboards
- Display application status

3   Navigation

3.1   System Access

To access the DG Skills Module, follow the link https://insetamis.inseta.org.za/
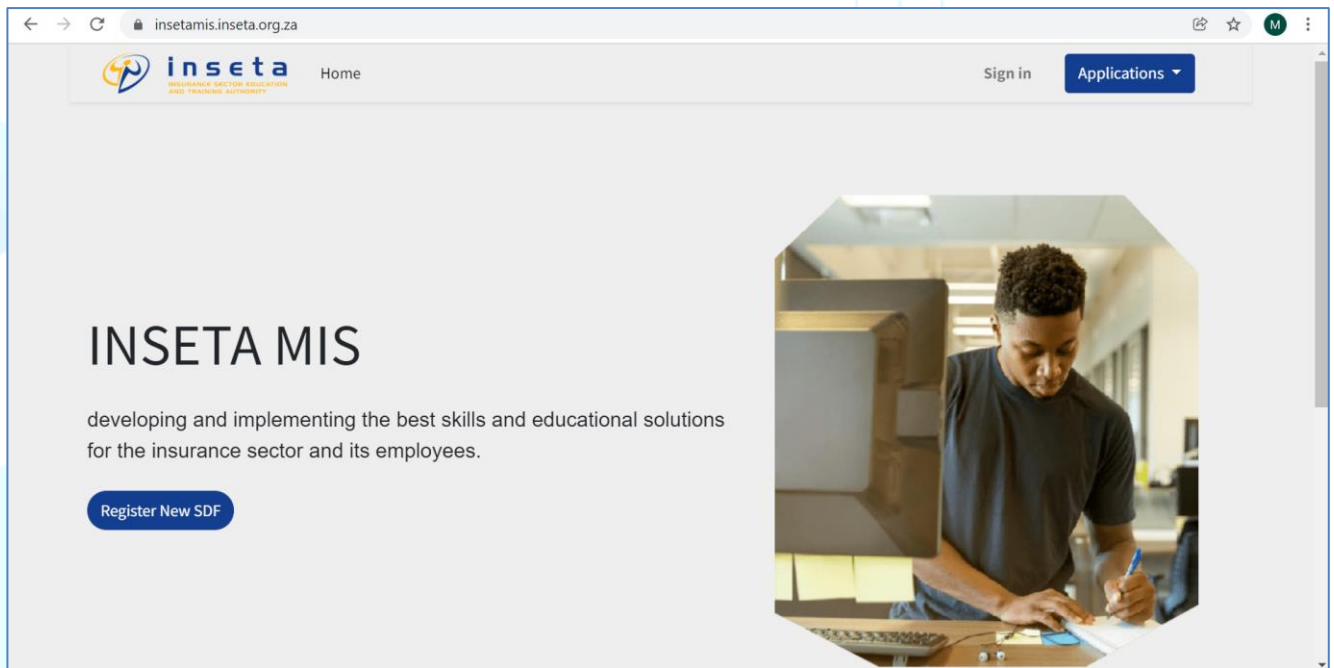
3.2   Icons and terminology

The following are icons used on the manual and their meaning

Icon	Meaning
ATTENTION	This icon alerts the user to take note of the important message
(i)	This icon displays information the result that come about when a process is completed
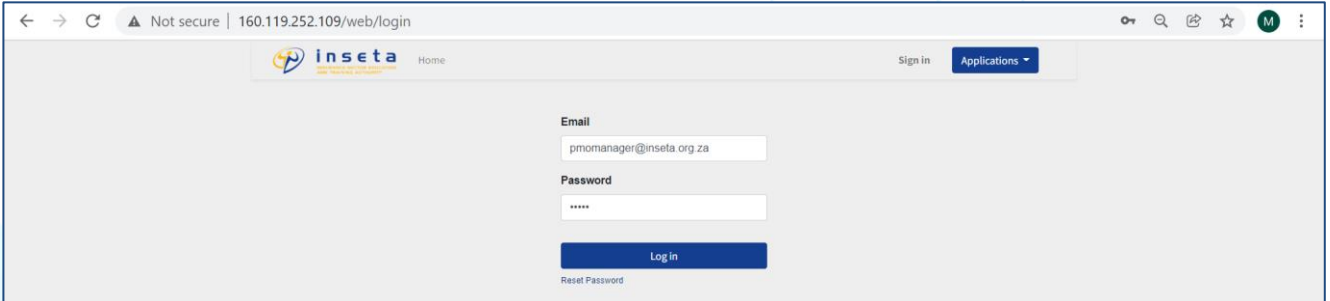
The following table includes abbreviations or notations that are used in the document and on the system.

Term/Acronym	Definition
DG	Discretionary Grants
DGEC	Discretionary Grants Evaluation Committee
DGAC	Discretionary Grants Adjudication Committee
WSP	Workplace Skills Plan
OFO	Organised Framework for Occupations

4   DG Funding window

This section provides a guide on how to open DG Funding window on the on the system.
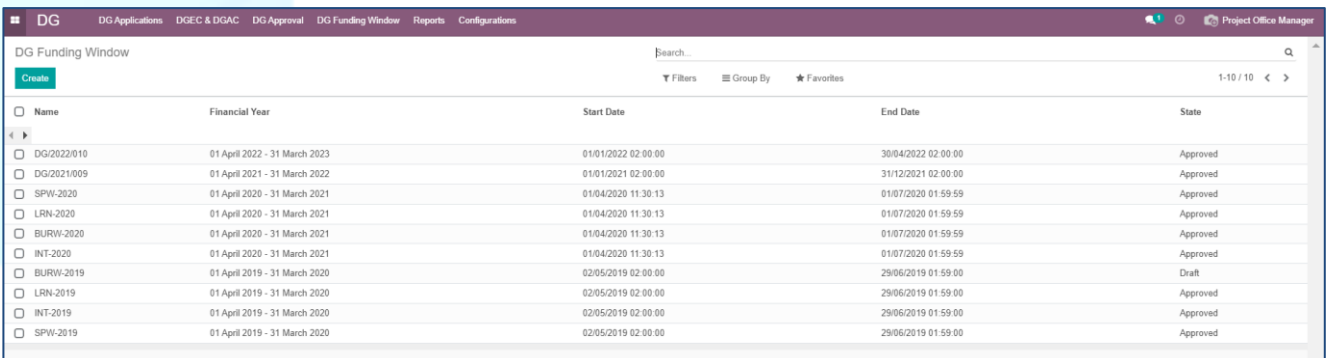
4.1   Open a DG Funding window

🖱   Login as the PMO manager by entering email and password, and then click **Log In**

🖱   Click on the menu icon , then click **DG**

🖱   Click on DG Funding Window
🖱   Click **Create**

Qualitative Innovative Solutions (Pty) Ltd is 100% Black Owned, BBBEE Level 1 Contributor
t +27 (0) 87 750 8185 | **f** +27 (0) 87 750 8185 | **e** info@qisolutions.co.za | **w** www.qisolutions.co.za

7
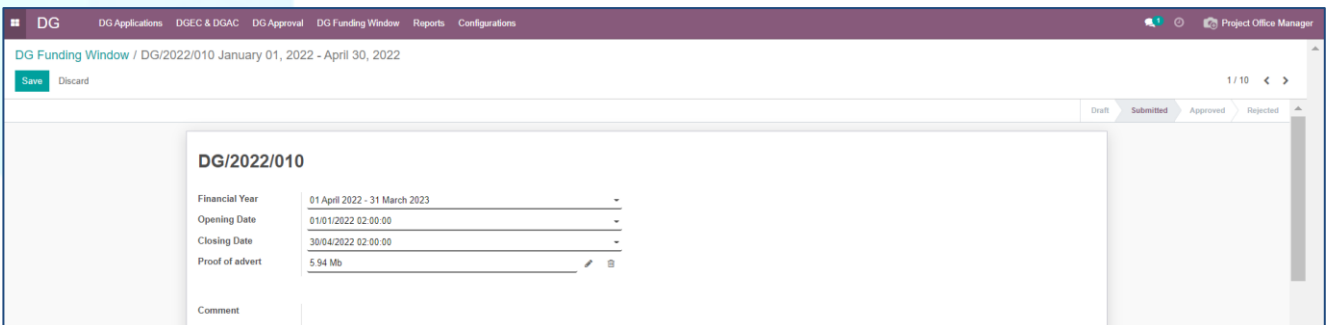
- 🖱 Select **Financial Year** (The Opening and closing date are auto populated)
- 🖱 Click on **Upload your file** to upload proof of advert
- 🖱 Click **Submit**
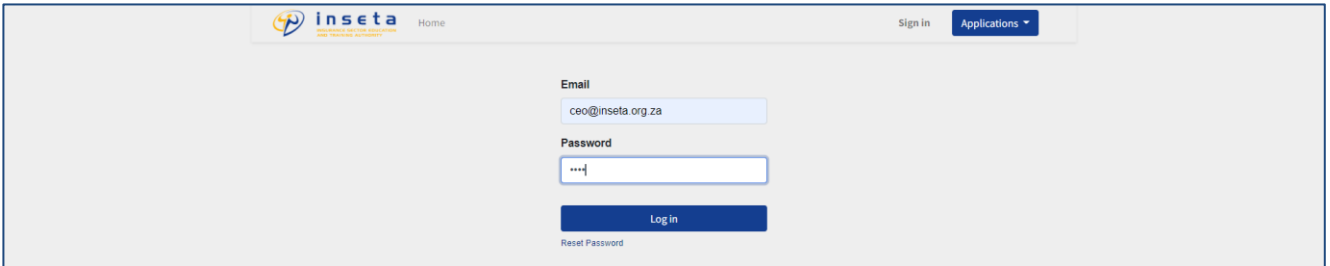
- 🖱 Click on **OK** to confirm

 A notification to approve the funding window is sent to the CEO. The status displays as submitted.

4.2 Approve DG Funding window

*Log in as the **CEO***
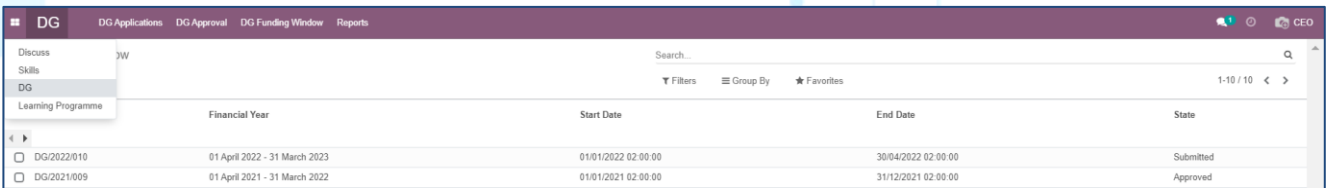
🖰 Login as the CEO by entering email and password, and then click **Log In**
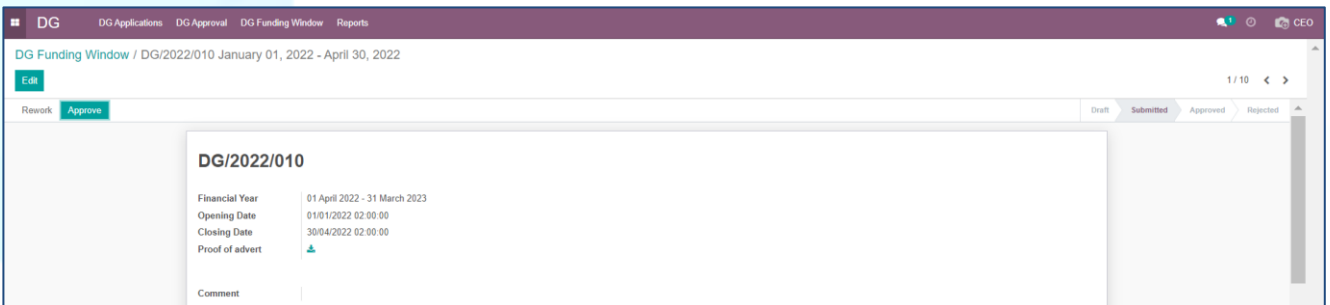
🖰 Click on the menu icon ⊞ , then click **DG**
🖰 Click **DG Funding Window**
🖰 Select the line item that is "submitted" on the status
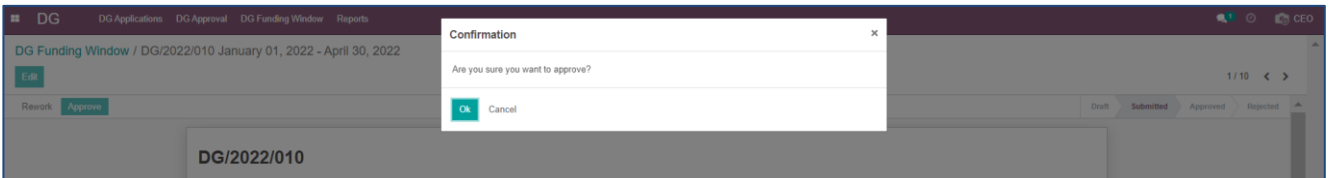
🖰 Review and then click **Approve**

🖰 Click **OK** to confirm
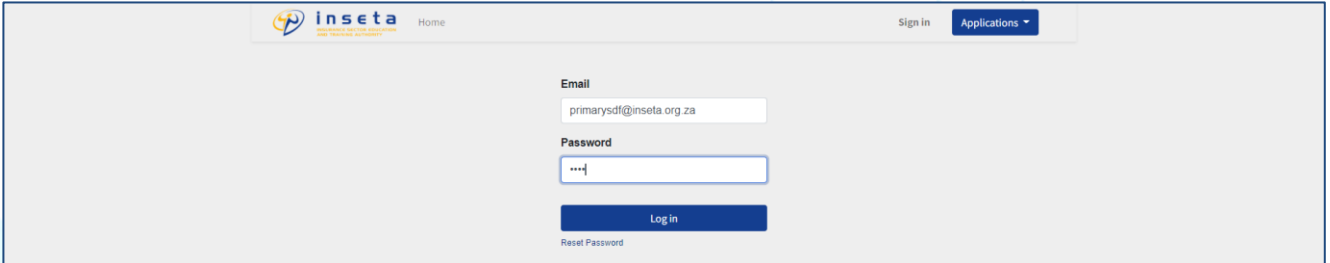
 The DG window is successfully opened
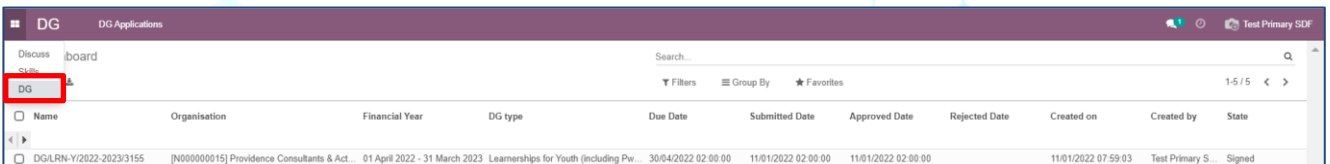
5 DG Application

Log in as the approved **primary SDF**

5.1 Apply for a DG
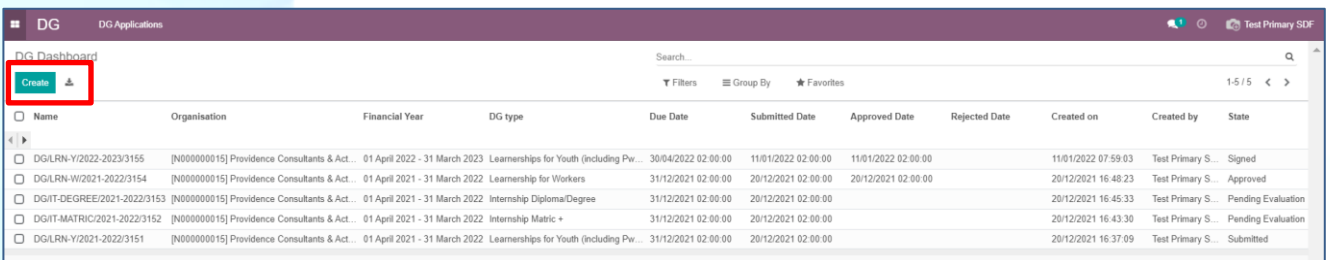
🖱 Login as the primary SDF by entering email and password, and then click **Log In**

🖱 Click on the menu icon ▦, then click **DG**

🖱 Click **Create**

🖰 Select **Organisation** (Only organisations linked to the SDF in the Skills module can be selected in the dropdown)

🖰 Select **DG type** and **Funding window**
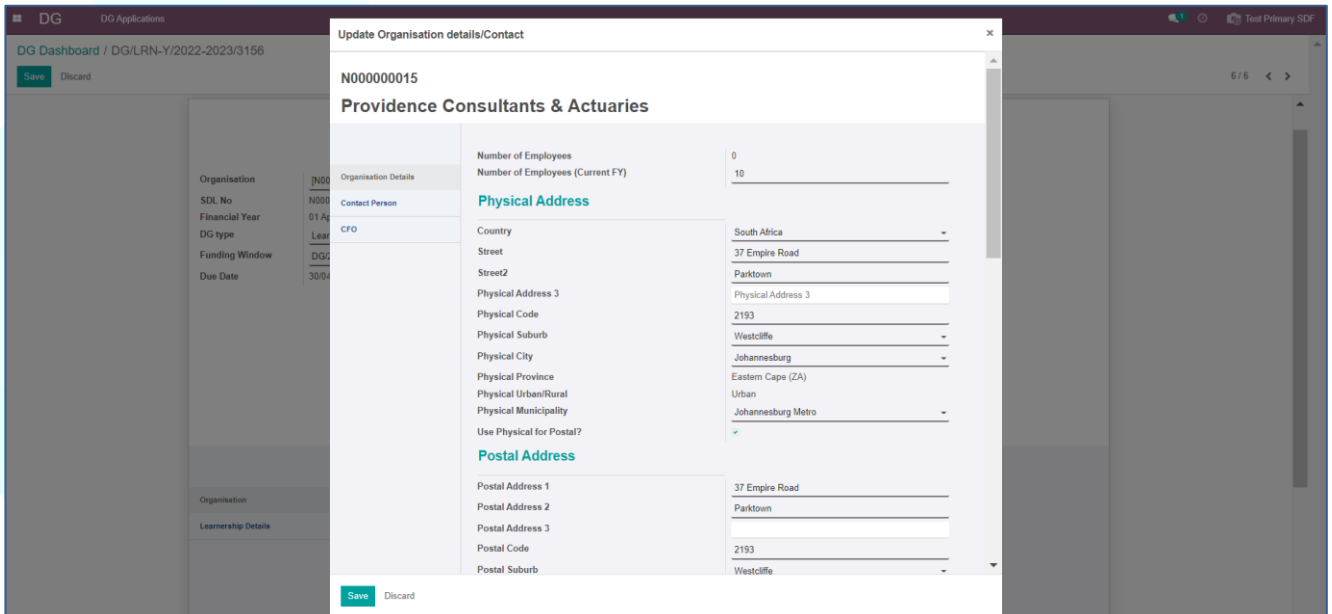
🖰 To edit details, click **Update Organisation Details**
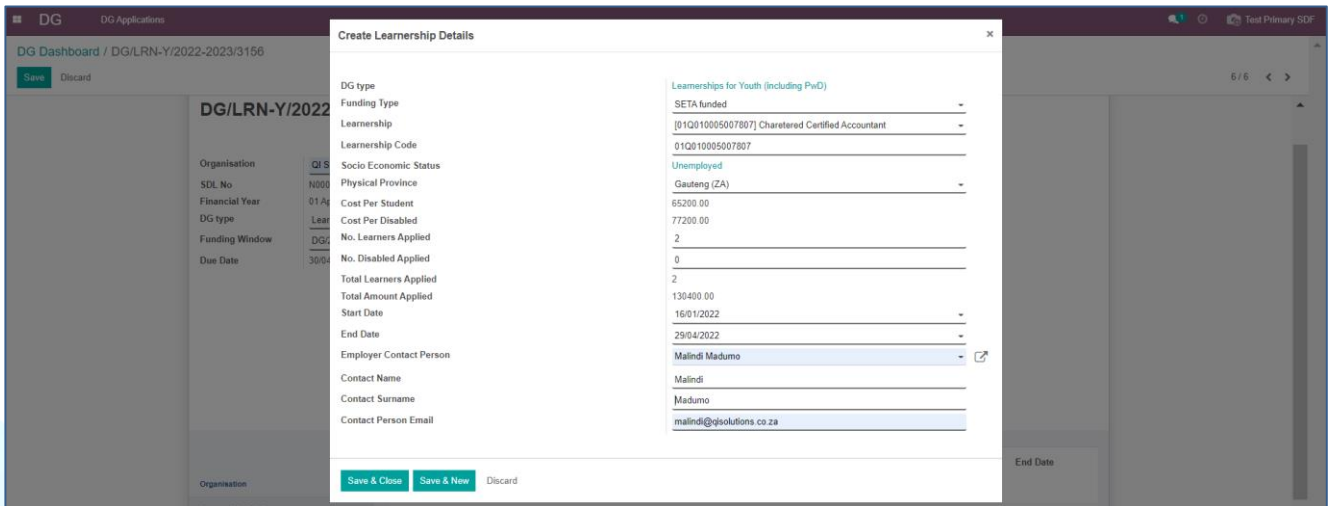
🖰 Edit relevant fields and click **Save**
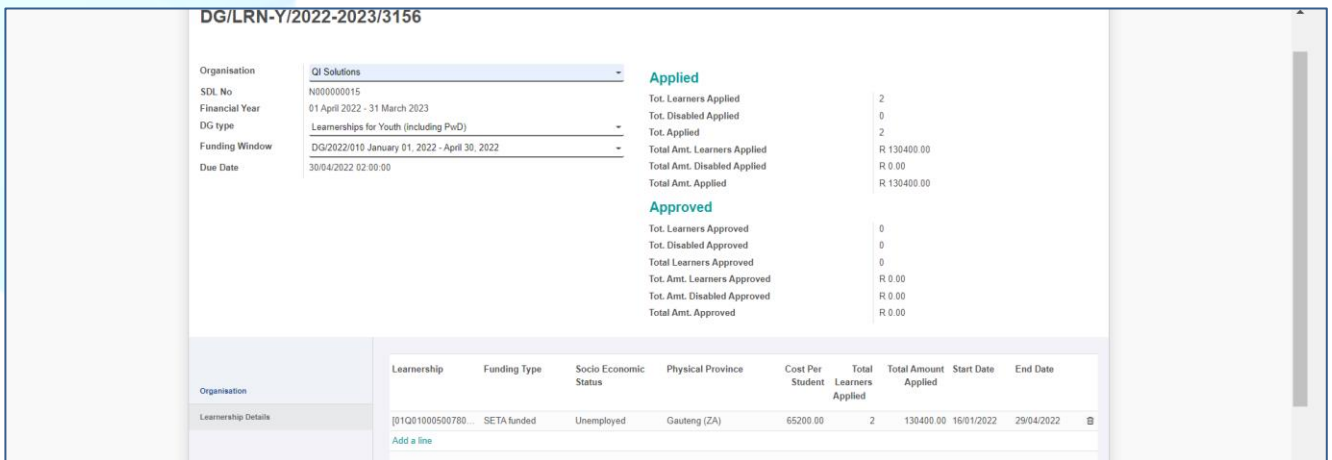
🖰 Click **Learnership details** and then **Add a line**
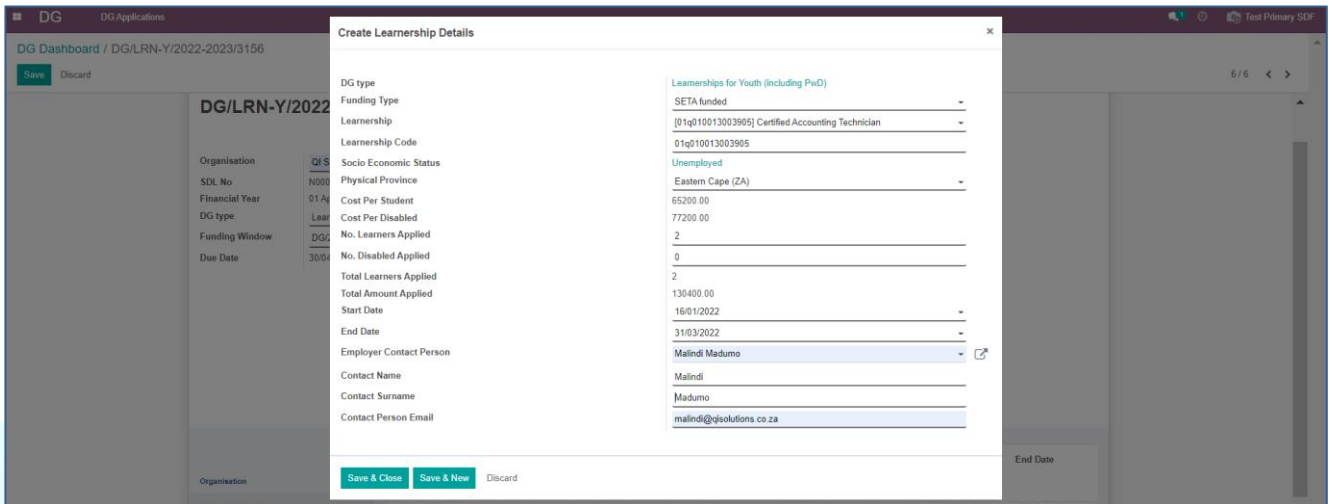
- 🖱 Select Funding type
- 🖱 Select Learnership (the Learnership Code is then auto populated)
- 🖱 Select Physical Province
- 🖱 Select no. of leaners (the total amount is auto calculated)
- 🖱 Select Start and end date
- 🖱 Select employer contact person
- 🖱 Click **Save & Close**
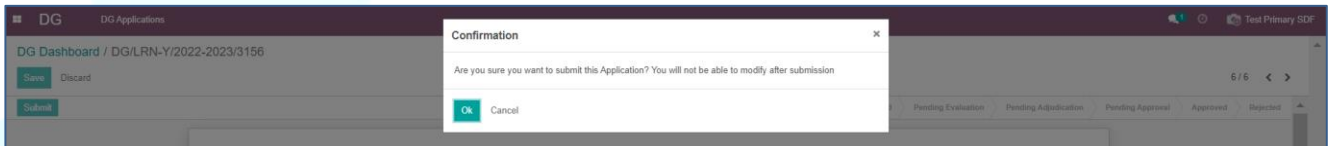
- 🖱 To apply for multiple programmes, click on **Add a line** once again

- 🖰 Capture Learnership details
- 🖰 Click **Save & Close**
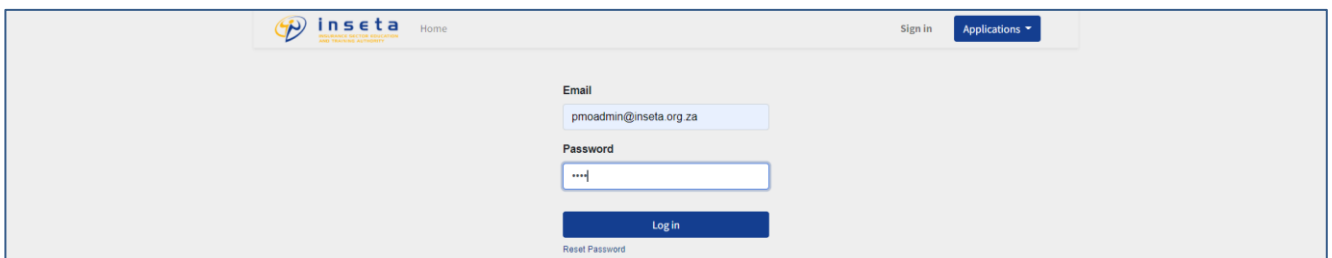
- 🖰 Click **Submit**, and **OK** to confirm

> **A status notification email is sent out to the employer. Another notification is sent to the Project Administrator for evaluation.**

5.2 DG Evaluation

*Log in as the **Project Administrator***

- 🖰 Login as the Project administrator by entering email and password, and then click **Log In**

👆 Click on the menu icon , then click **DG**

👆 Select by clicking on the submitted line item

👆 Click **DG Evaluation**

👆 Select line item to conduct a desktop evaluation

👆 Capture the no. of leaners recommended

🖱 Under the comment section, change the option to **verified**

🖱 Click **Save**

Repeat the step for all programmes submitted

🖱 Click **Complete Evaluation**

🖱 Click **OK** to confirm

5.3   Generate DGEC Report

🖱 Click **Reports**

- Select Report type (DGEC Recommendation)
- Select Financial Year
- Select Pending evaluation on DG Application status
- Click **View lines**

- Click the download arrow to export report

- The file is exported to the local machine

The Project admin send the report to the DGEC.

5.4   DGEC Recommendation

*Log in as the **DGEC Chairperson***

🖱 Login as the DGEC Chairperson by entering email and password, and then click **Log In**

🖱 Click on the menu icon ▦, then click **DG**
🖱 Click **DGEC & DGAC**

🖱 Click **Create**

- 🖱 Select **Financial year**
- 🖱 Click **Search Records** for programmes
- 🖱 Click **DGEC Recommend**

- 🖱 Select Recommend on Option
- 🖱 Upload **DGEC Recommendation sheet**
- 🖱 Capture Comment
- 🖱 Click **Recommend**

A notification email is sent to the DGAC to recommend the application.

5.5 DGAC Recommendation

*Log in as the **DGAC Chairperson***

🖐 Login as the DGAC Chairperson by entering email and password, and then click **Log In**

🖐 Click on the menu icon [ ], then click **DG**
🖐 Click **DGEC & DGAC**

🖱 Select the line item to recommend

🖱 Review and then click **DGAC Recommend**

🖱 Select Recommend on the option field
🖱 Upload the DGAC recommendation sheet
🖱 Capture comments
🖱 Click **Recommend**

A notification email is sent to the CEO for approval.

5.6   CEO Bulk Approval

*Log in as the **INSETA CEO***

🖰   Login as the CEO by entering email and password, and then click **Log In**
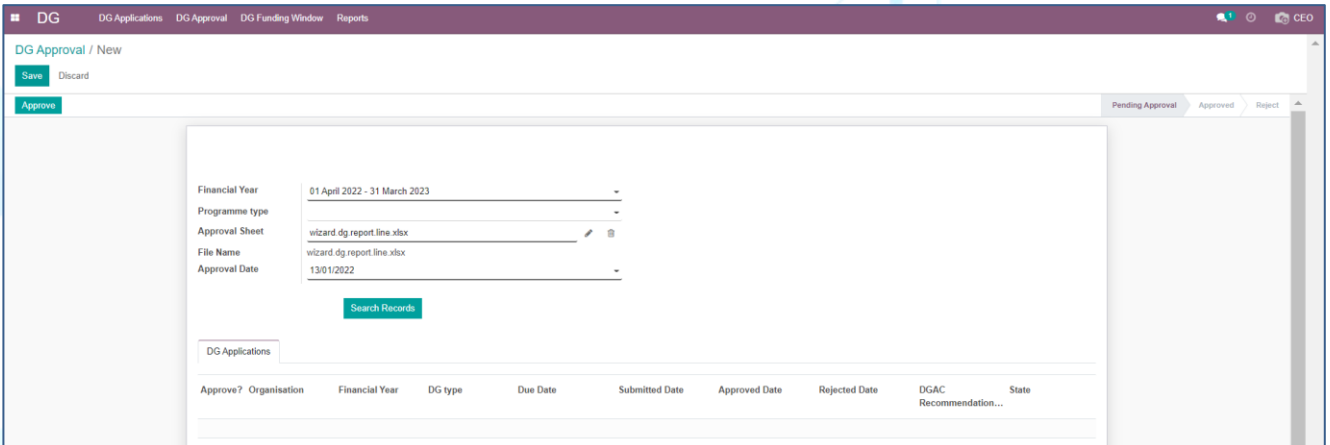

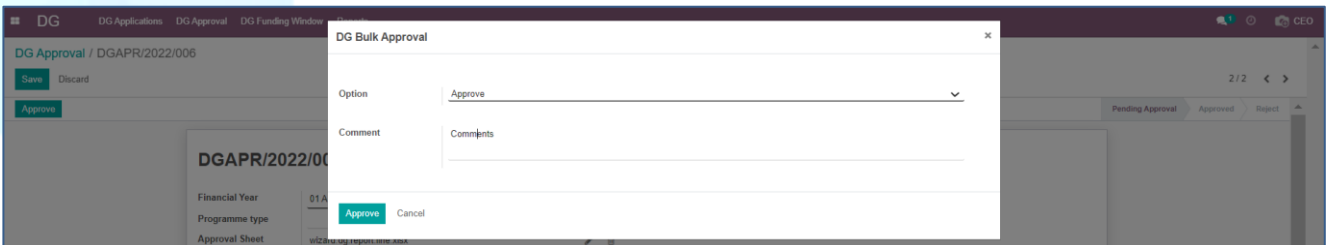🖰   Click on the menu icon , then click **DG**

🖰   Click **DG Approval**

�promptClick **Create**

�️ Select Financial year

�️ Upload approval sheet submitted by the DGAC

�️ Click **Search Records**
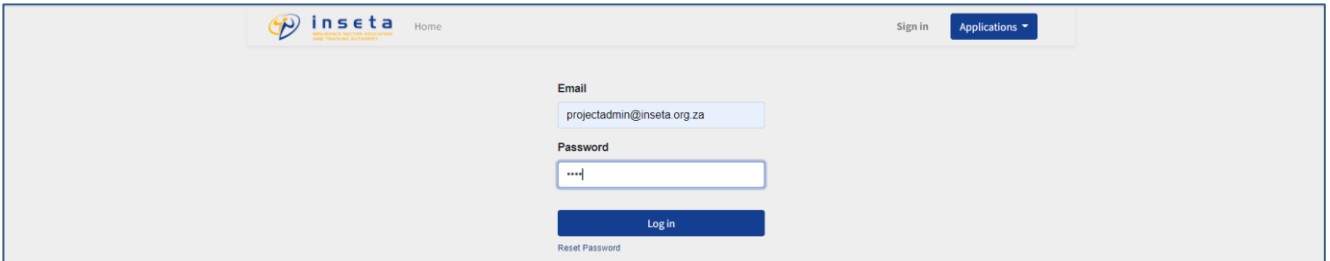
�️ Review applications and click **Approve**

�️ Select Approve on the option field

�️ Capture comments

�️ Click **Approve**

A notification email is sent to Project Administrator for recommendation of the applications.

t +27 (0) 87 750 8185 | f +27 (0) 87 750 8185 | e info@qisolutions.co.za | w www.qisolutions.co.za

5.7   Project Administrator Recommendation

*Log in as the **Project Administrator***

🖱 Login as the Project Administrator by entering email and password, and then click **Log In**

🖱 Click on the menu icon ▦ , then click **DG**

🖱 Click DG Approval to download to download the approval sheet for reference

🖱 Click **DG Applications**
🖱 Select by clicking on the approved line items

🖱 Click **DG Evaluation**, and then **Edit**

🖱 Select line item (Repeat this step for all line items)

🖰 Capture the approval details as per the approval sheet

🖰 Click Generate letter

🖰 Click **Ok** to confirm

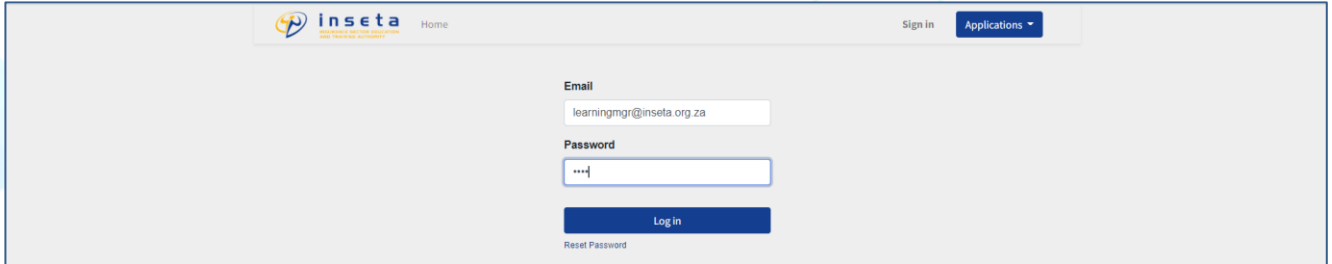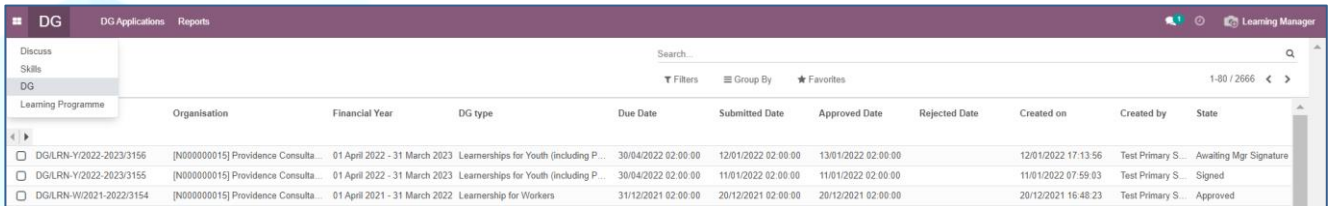**The applications are sent to the Learning Manager for signing.**

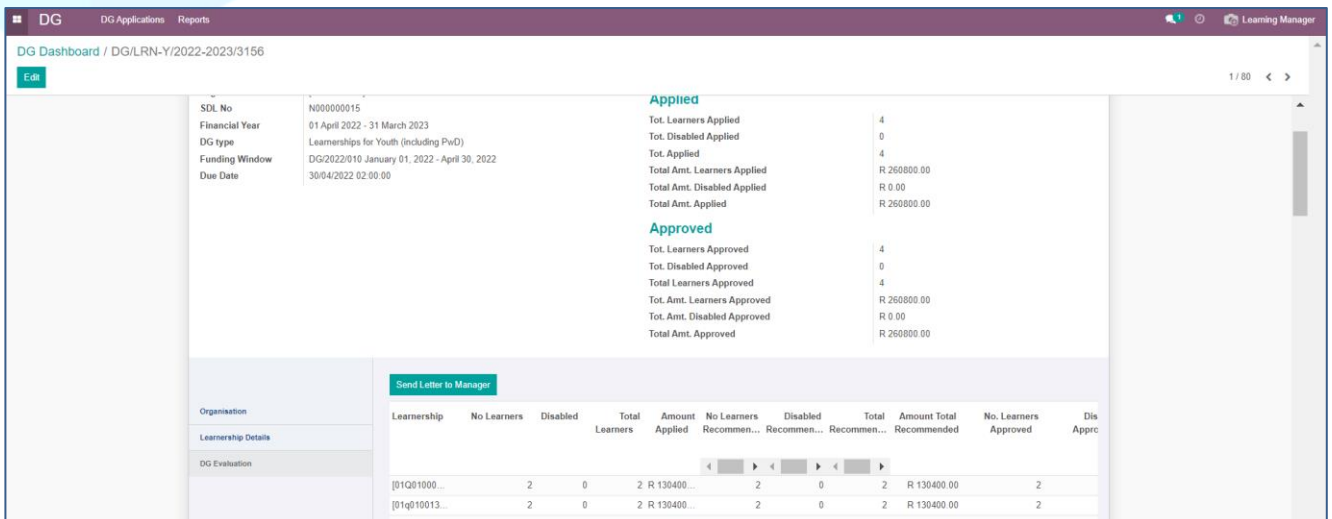## 5.8   Learning Manager Signing

Log in as the Learning Manager

🖱   Login as the Learning Manager by entering email and password, and then click **Log In**

🖱   Click on the menu icon [▦] , then click **DG**

🖱   Select by clicking on the approved line items awaiting signature

🖱   Select programme line item (Repeat this step for all line items)

🖰 Click Print **Recommendation letter**

🖰 Review letter

🖱 Click **Sign Manager**

🖱 Click **Ok** to confirm

The applications are sent to the COO for signing.

*Log in as the **COO***
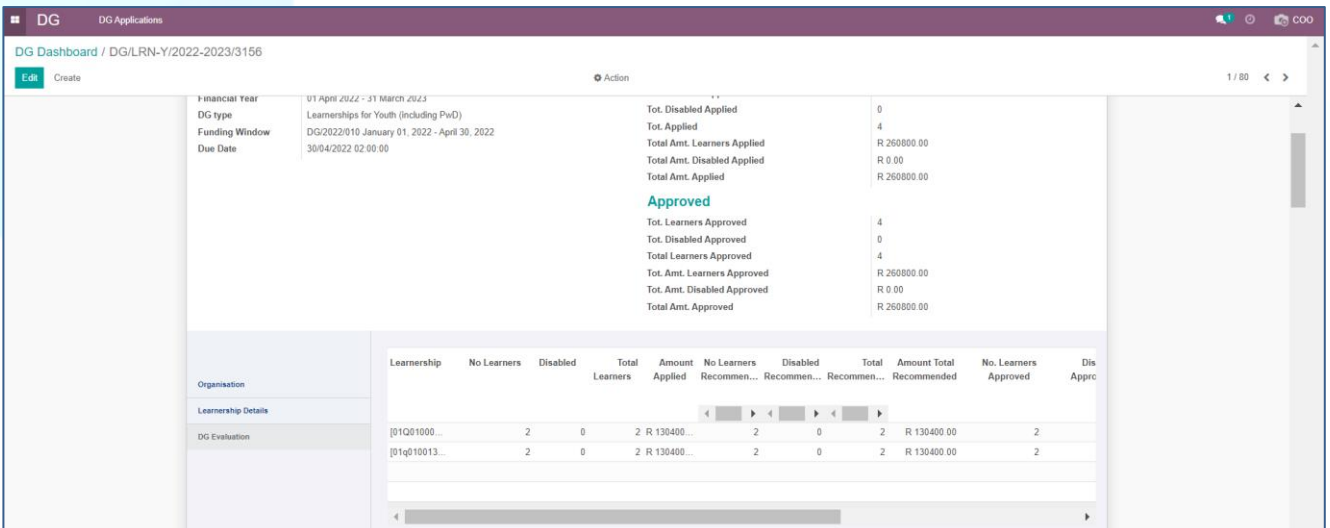
🖱 Login as the COO by entering email and password, and then click **Log In**

🖱 Click on the menu icon ▦, then click **DG**
🖱 Select by clicking on the approved line items awaiting signature
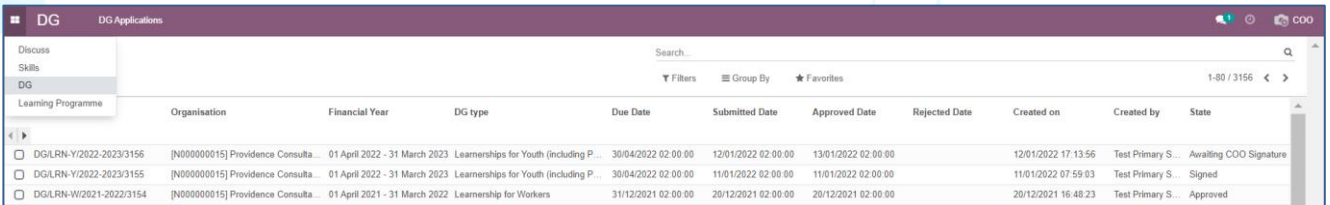

🖱 Select programme line item (Repeat this step for all line items)

🖰 Click Print **Recommendation letter**

and the employer, detailing the learning programme title and registration code as well as clear start (commencement) and end dates of learners.

4.3.2 Certified copy of learners' Identity document

4.3.3 A duly completed, signed, and dated fixed term employment contract between the learner and the employer.

4.3.4 Certified copy of learner's highest qualification

4.3.5 Complete and accurate SETMIS Upload Template

4.3.6 Protection of Personal Information Act (POPIA) declaration completed, duly signed, and dated by each learner

4.3.7 Confirmation of disability if applicable

Submissions and enquiries are to be sent to Learnerships@inseta.org.za
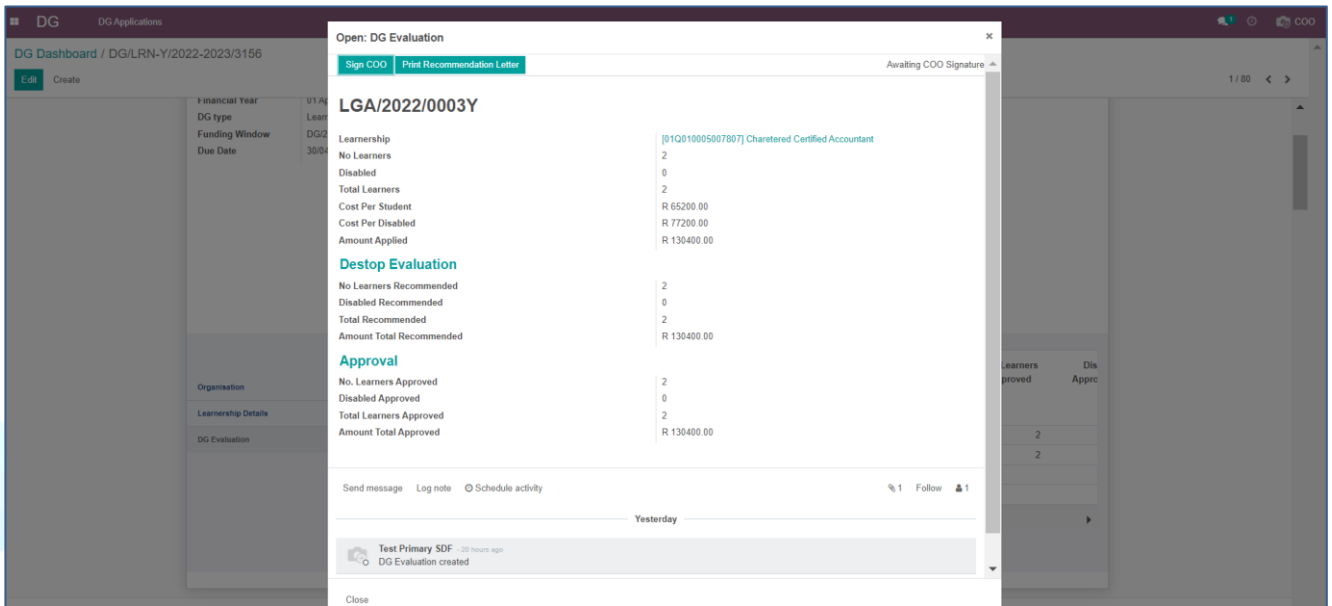
Recommended By

Learning Manager
Learning Manager: Youth Programmes
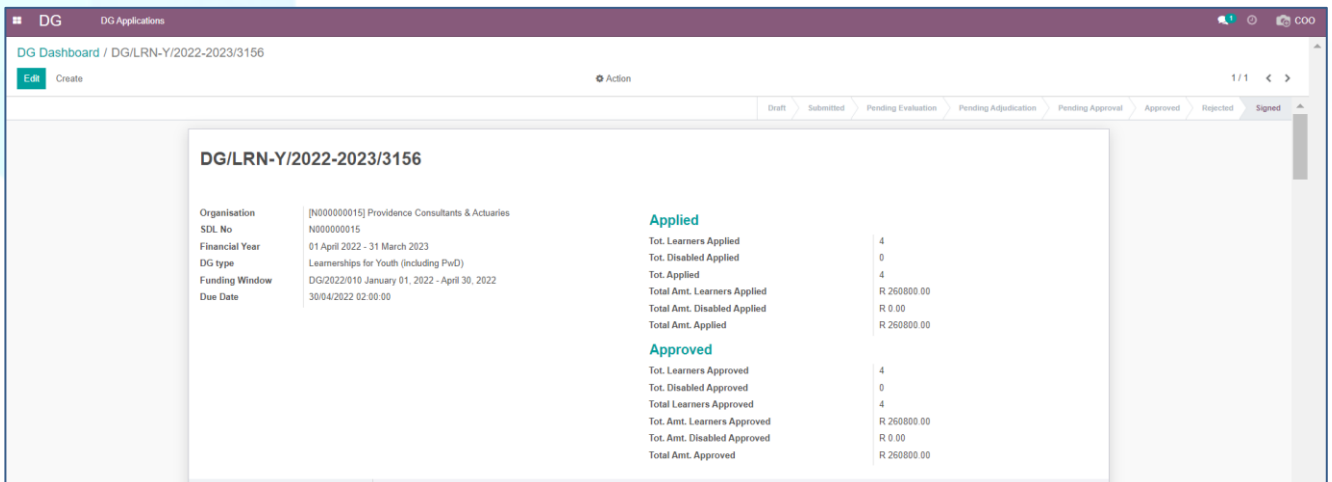INSETA

Date: January 13, 2022

🖰 Review letter (the letter should have the Learning manager signature at this stage)
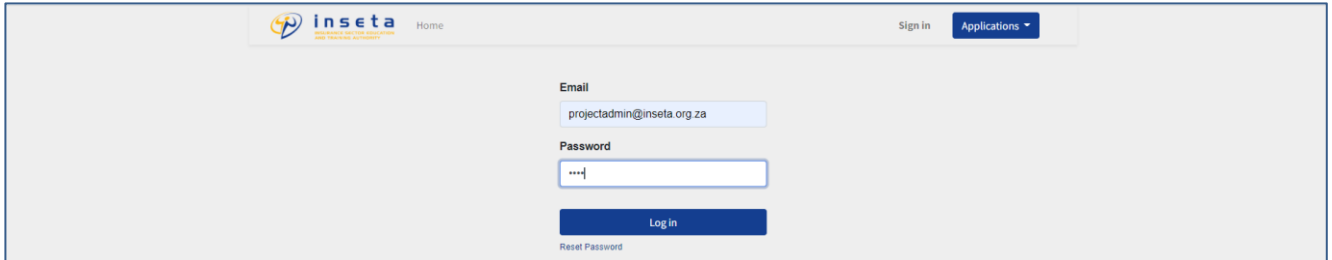
🖱 Click **Sign Manager**

🖱 Click **Ok** to confirm

The Signed applications are sent to the Project Administrator for review.

t +27 (0) 87 750 8185 | **f** +27 (0) 87 750 8185 | **e** info@qisolutions.co.za | **w** www.qisolutions.co.za

5.10 Project Administrator review

*Log in as the **Project Administrator***

- 🖱 Login as the Project Administrator by entering email and password, and then click **Log In**

- 🖱 Click on the menu icon ⊞, then click **DG**
- 🖱 Select by clicking on the signed line items

- 🖱 Click **DG Evaluation**
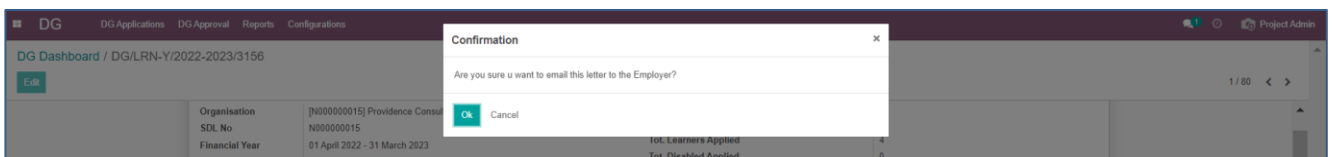- 🖱 Click **Print letters** to review
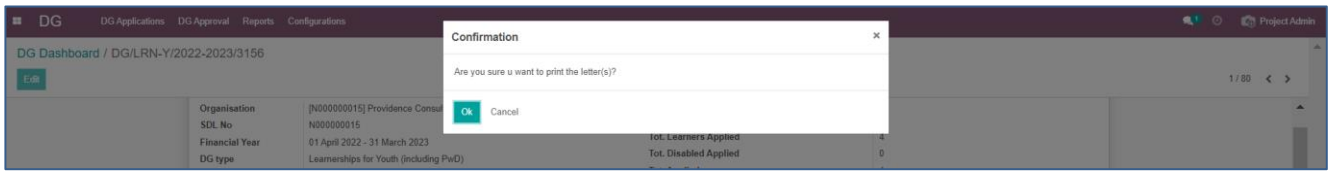
👆 Click **OK** to confirm

👆 Review letter(s) (the letter should have the learning manager and coo signature)

👆 Once all letters have been reviewed, Click **Send Letter to Employer**

👆 Click **Ok** to confirm

The letter(s) are to the contact person selected for the DG application.