



# MQA-I-Share

## Stakeholders Training Manual

(Version 6: Dated 28 March 2012)

Name: \_\_\_\_\_

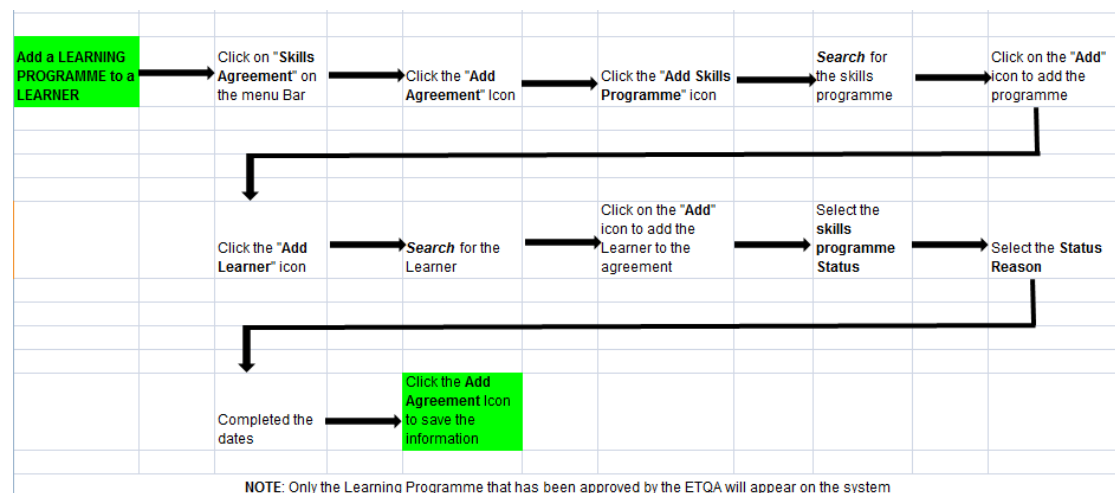
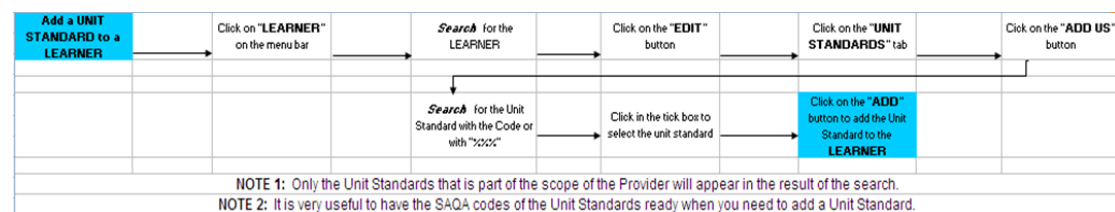
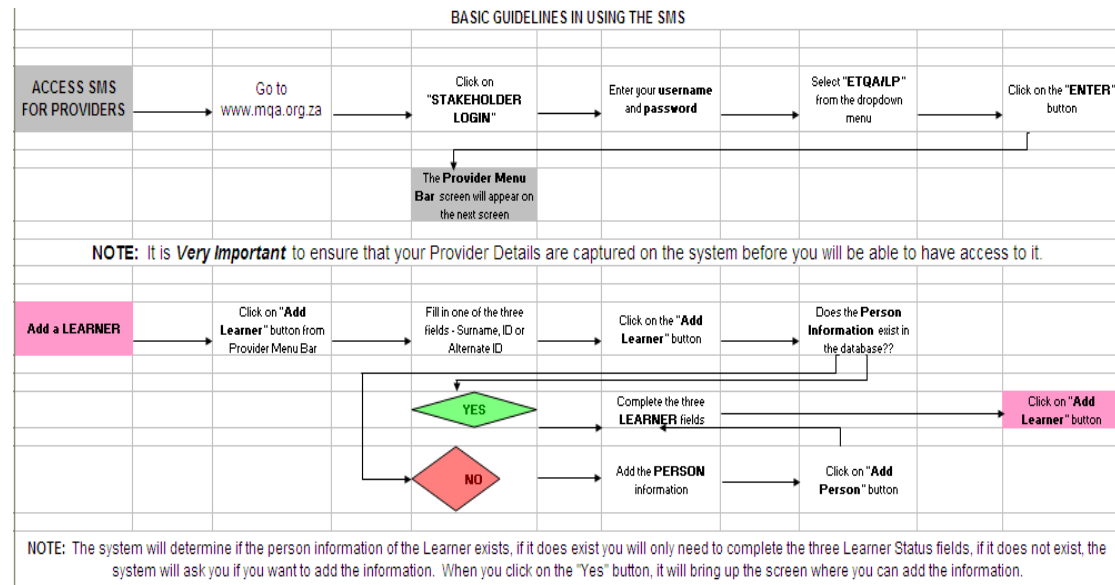


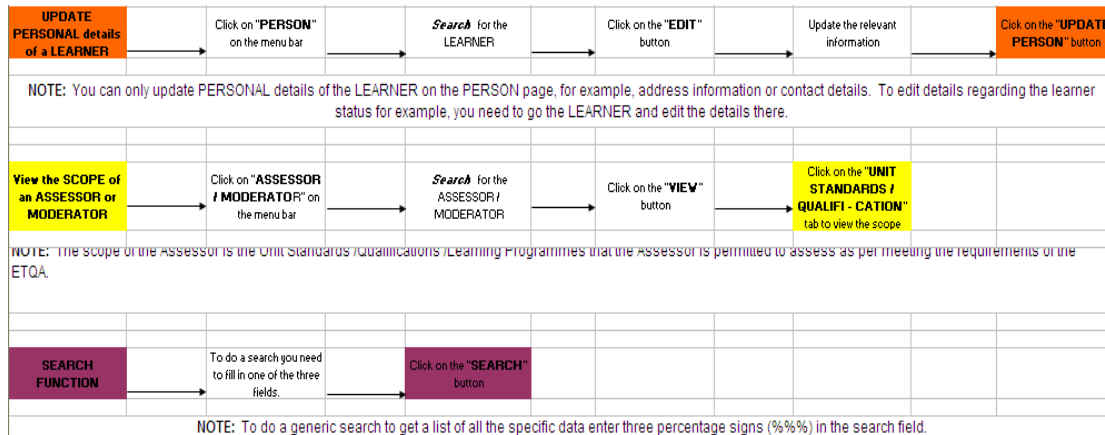
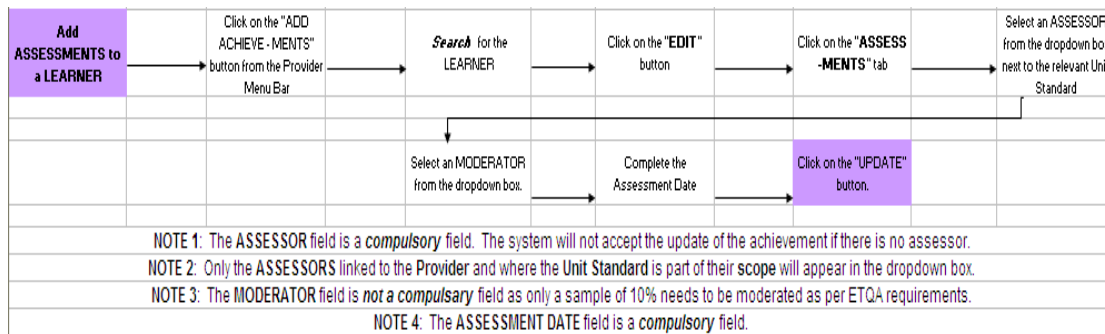
MINING QUALIFICATIONS AUTHORITY

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## A. FLOWCHART





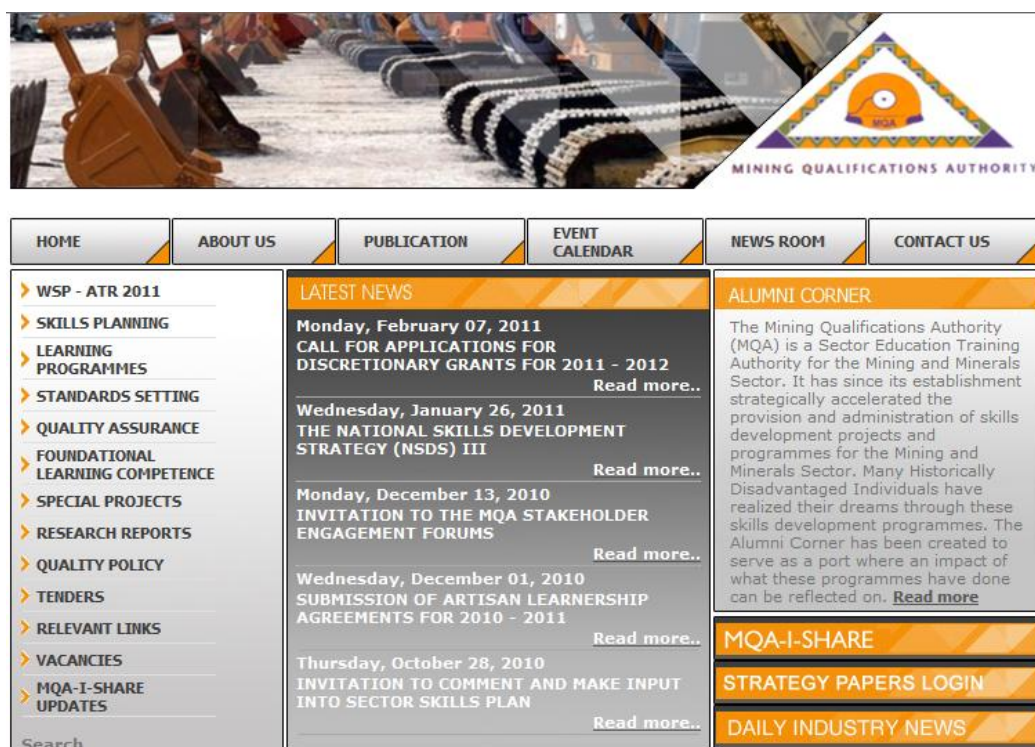
We have created the flow charts above for quick and easy reference, below is further explanations with pictures on the flow charts above to make it easier for you.

## B. ACCESS TO THE SYSTEM

STEPS	ACTIONS
-------	---------

**NOTE:** It is **Very Important** to ensure that your Provider Details are captured on the system before you will be able to access the system.

**Step 01** Go to the website [www.mqa.org.za](http://www.mqa.org.za)



**Step 02** Click on "MQA I-SHARE"

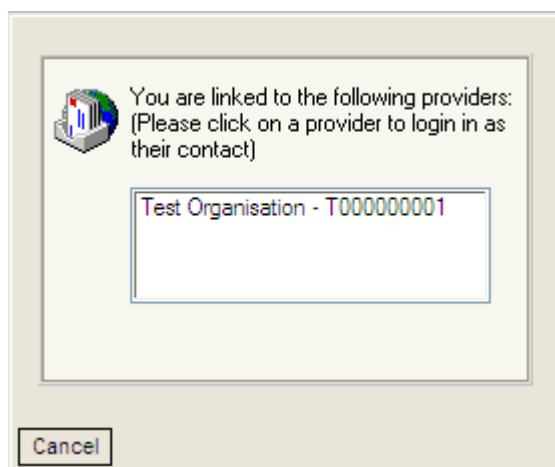
**Step 03** <sup>1</sup>Enter your **username** and **password**



Username :	<input type="text"/>
Password :	<input type="password"/>
Logon to :	ETQA & LShips <input type="button" value="v"/>
<input type="button" value="Enter"/> <input type="button" value="Change Password"/>	

<sup>1</sup> Your username will only be created once an application has been made to the MQA ETQA who will verify your information and send this to Deloitte for creation. Please go the MQA website to download the form. Please remember that your username is created by using you ID and your password is created using your surname. The password can be changed at any time by yourself

STEPS	ACTIONS
Step 04	Select " <b>ETQA/Lship</b> " from the dropdown menu
Step 05	Click on the " <b>ENTER</b> " button
Step 06	<sup>2</sup> Click on the organisation you are registered to




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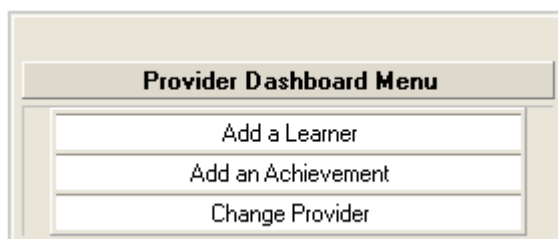
<sup>2</sup> Please note that the accredited body will be the organization you will have access to. All organization sites will be linked to the main accredited body and there will not be separate logins for these other sites.



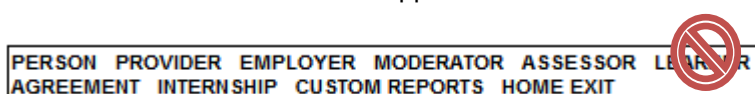
## C. ADD LEARNER

STEPS	ACTIONS
-------	---------

**Step 01** Click on "Add Learner" button from Provider Menu Bar



Don't click on the learner on the upper menu bar as this won't link the learner correctly.



**Step 02** Fill in one of the three fields - Surname, ID or Alternate ID

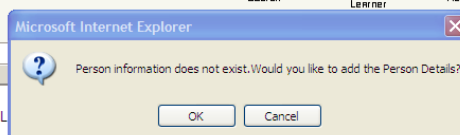
Learner	
Surname	<input type="text"/>
Identity Number	<input type="text"/>
Alternate Identity No.	<input type="text"/>
Certificate No.	<input type="text"/>

Search    Add Learner    Reset

**Step 03** Click on the "Add Learner" button

Learner	
Surname	<input type="text" value="marais"/>
Identity Number	<input type="text"/>
Alternate Identity No.	<input type="text"/>
Certificate No.	<input type="text"/>

Search    Add Learner    Reset

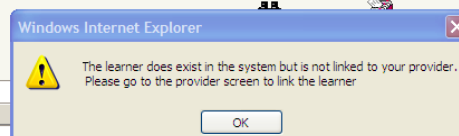


In the example above the learner surname was completed: Marais; the database immediately picked up that this person information does not exist therefore you will need to create the person.

In the example below the learner already exists in the database and you are asked whether you would like to add this learner to your provider.

Learner	
Surname	<input type="text"/>
Identity Number	<input type="text" value="6604075061088"/>
Alternate Identity No.	<input type="text"/>
Certificate No.	<input type="text"/>

Search    Add Learner    Reset





No Learners found for your Search Criteria. Please re-enter a new Search Criteria



When you receive this message please ensure that this is the correct learner and that this learner needs to be linked to your provider.



STEPS	ACTIONS
-------	---------

- Step 03 (Cont)**
- Click on the provider tab
  - Fill in your company details


PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME UNIT STANDARDS AGREEMENT CUSTOM REPORTS HOME EXIT	
<b>Provider</b>	
Legal Name	<input type="text" value="test"/>
Trade Name	<input type="text"/>
SDL No	<input type="text"/>
Company Registration No	<input type="text"/>
Provider Registration No	<input type="text"/>
 Search  Reset	

- Click search

PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME UNIT STANDARDS AGREEMENT CUSTOM REPORTS HOME EXIT	
<b>Provider</b>	
Legal Name	<input type="text"/>
Trade Name	<input type="text"/>
SDL No	<input type="text"/>
Company Registration No	<input type="text"/>
Provider Registration No	<input type="text"/>
 Search  Reset	



Legal Name	Trading As	SDLNo	Co Reg	Provider Reg No	Edit	View
Test Organisation	Test Organisation	T000000001		16/MQA/0093/PA/011 08		




- Click Edit

PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME UNIT STANDARDS AGREEMENT CUSTOM REPORTS HOME EXIT	
<b>Provider</b>	
Legal Name	<input type="text" value="Test Organisation"/>
Trade Name	<input type="text" value="Test Organisation"/>
SDL No	<input type="text" value="T000000001"/>
Company Reg No	<input type="text"/>
Provider Registration No	<input type="text" value="16/MQA/0093/PA/011 08"/>
 Reset	

Details	Addresses	Contacts	Site Info	Unit Std	Qualification	Programme	Appeals
Learnerships	Agreements	Audit	Assessor	Moderator	Learners	Employers	Discretionary Grant
Organisation Name	<input type="text" value="Test Organisation"/>				Provider Accreditation Number	<input type="text" value="16/MQA/0093/PA/011 08"/>	
Trading Name	<input type="text" value="Test Organisation"/>				Date Application Received	<input type="text" value="01/01/2008"/>	
Legal Status	<input type="text"/>				Provider Int/Ext	<input type="text" value="External"/>	
Registration No	<input type="text"/>				Provider Class	<input type="text" value="Financial"/>	
Registration Date	<input type="text"/>				Quality Management System	<input type="text" value="PeopleSoft"/>	
Years Trading	<input type="text" value="2009"/>				Accredit Start Date	<input type="text" value="01/01/2008"/>	
SARS No	<input type="text" value="T000000001"/>				Accredit End Date	<input type="text" value="12/12/2008"/>	

- Click on the learners tab on the sub menu

PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME UNIT STANDARDS AGREEMENT CUSTOM REPORTS HOME EXIT	
<b>Provider</b>	
Legal Name	<input type="text" value="Test Organisation"/>
Trade Name	<input type="text" value="Test Organisation"/>
SDL No	<input type="text" value="T000000001"/>
Company Reg No	<input type="text"/>
Provider Registration No	<input type="text" value="16/MQA/0093/PA/011 08"/>
 Add Learner  Reset	

Details	Addresses	Contacts	Site Info	Unit Std	Qualification	Programme	Appeals
Learnerships	Agreements	Audit	Assessor	Moderator	Learners	Employers	Discretionary Grant
Last Name	First Name			National ID		View	
<input type="text" value="Bosoga"/>	<input type="text" value="Milicent"/>			<input type="text" value="8604210340080"/>			
<input type="text" value="Kleingeld"/>	<input type="text" value="Elvane"/>			<input type="text" value="7309050217080"/>			
<input type="text" value="Lategan"/>	<input type="text" value="Valaine"/>			<input type="text" value="6903150040088"/>			



- Click on the add learner button
- Fill in the learner ID number

ETQA - Learnerships  
User Name : Test A Test B  
Logged on as : Provider  
Seta Name : MQA

PERSON PROVIDER EMPLOYER MODERATOR AGREEMENT CUSTOM REPORTS HOME EXIT

**Provider**  
Legal Name: Test Organisat  
Trade Name: Test Organisat  
SDL No: T000000001  
Company Reg No:  
Provider Registration No: 16/MQA/0093

**Learner**  
Surname:   
ID Number: 6604075061088  
Alternate ID Number:   
Search Reset

Details Addresses Contacts Site In  
Learnerships Agreements Audit Asses

Last Name  
Bosoga  
Kleingeld  
Lategan  
Maquima

Eugene 7905295650082

- Click on the Search button

MODERATOR ASS...  
HOME EXIT

Test Organisat  
Test Organisat  
T000000001  
16/MQA/0093

Contacts Site In  
dit Asses

**Learner**  
Surname:   
ID Number:   
Alternate ID Number:   
Search Reset

Surname and Name	ID Number	Alternate ID Number	Add
Kleingeld Duwain	6604075061088		

http://196.4.89.14/etqa/Provider\_AddLearner.asp?sType=P&ProvID=2&Orgid=1

- Click on the add button

You may now go back to the learner tab on the main menu and view the learner information and complete the additional information of this learner.

#### Step 04 Does the **Person Information** exist in the database??

- NO** – Go to Step 5  
**YES** – Go to Step 7

**NOTE:** The system will determine if the person information of the Learner exist. If it does exist you will only need to complete the three Learner Status fields. If it does not exist, the system will ask you if you want to add the information. When you click on the “Yes” button it will bring up the screen where you can add the information. Please see steps 5 and 7 below

STEPS	ACTIONS
-------	---------

### <sup>3</sup>Step 05 Add the <sup>4</sup>PERSON information

### Step 06 Click on <sup>5</sup>"Add Person" button

### Step 07 Complete the three LEARNER fields

<sup>3</sup> Current occupation for a person who has never worked and are then signed onto a Learnership or apprenticeship – the MQA recommends you use the Term “Learner”.  
Socio economic status for 18.2 Learners is confirmed as “Unemployed looking for work”. This is the most generic way to describe such persons

Status reason – For any “Active” learner (someone you have signed on) this is always “Registered”

<sup>4</sup> For Alternative Id numbers please place the learner Alt ID number in the Alt ID field as well as in the ID number field. Remember to select passport as the type

<sup>5</sup> You cannot click on search unless the learner has been created. Initially you will click on add learner and once this has been successful you can search for your learner

STEPS	ACTIONS
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## Step 08 Click on "Add Learner" button

PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER LEARNERSHIP PROGRAMME UNIT STANDARDS  
AGREEMENT CUSTOM REPORTS HOME EXIT



**Learner**

Surname:

Identity Number:

Alternate Identity No.:

Certificate No.:

Details	Address	Agreements	Achievements	Employer	Provider	Parent/Guardian	Unit Standards	Skills Programme	Assessments	Documents	Follow Up	Artisan Development	Abel
Title	<input type="text" value="Mr"/>												
Name	<input type="text" value="Test"/>												
Surname	<input type="text" value="Test"/>												
Maiden Name	<input type="text"/>												
RSA Identity No	<input type="text" value="8504210340068"/>												
Citizen Residential Status	<input type="text" value="South Africa"/>												
Gender	<input type="text" value="Male"/>												
Equity	<input type="text" value="Black Indian/Asian"/>												
Disability Status	<input type="text" value="None"/>												
Home Language	<input type="text" value="English"/>												
Cell	<input type="text"/>												
Method of Communication	<input type="text" value="E-mail"/>												
Date of Birth	<input type="text" value="21/04/1996"/>												
Nationality	<input type="text" value="South Africa"/>												
MQA OFD	<input type="radio"/>												
Other OFD	<input type="radio"/>												
Learner Status	<input type="text" value="Enrolled"/>												
Status Effective Date	<input type="text" value="11/01/2008"/>												
Status Reason	<input type="text" value="Active Learner"/>												

Complete the additional fields that have been created specifying the exact information as this will pull through to reports and targets as is needed by MQA.

The system will now allow the user to access any of the sub menu items until you have completed the three areas as showed in step 7. Once this has been completed and you click on add learner in the search field the icon will change to update learner and the greyed out fields will become operational for your use.

Please note the following:

### Address Information

The system will allow the user to go to the address details. The address details default from the person table. Any updates that are to be done to this learner need to be done on the person screen; this due to the fact that this information pulls across to all areas of the I-Share system. Completing it only on the learner tab would not automatically rectify the areas on the other areas of the system.

Please note that the **agreements** will only be linked from the agreement function. If an agreement was signed by the learner and registered by the MQA the information will appear on the agreement screen and the detail can be viewed from here.

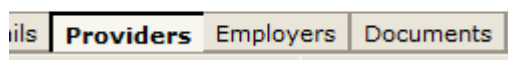
## D. ADD A SKILLS PROGRAMME TO A LEARNER

STEPS	ACTIONS																																																
Step 01	<p>Click on "Skills Agreement" on the Main menu bar</p> <div><div>GANISATION PROVIDER</div><div>SKILLS.AGREEMENT AI</div></div>																																																
Step 02	<p>Click on "Add Agreement" Icon</p> <div><div>Skills Agreements</div><div><div>Skills Agreement Ref No</div><div></div><div>ID Number</div><div></div><div>Search</div><div>Add Agreement</div></div></div>																																																
Step 03	<p>Complete the following fields:</p> <div><div><div>MainDetailsProvidersEmployersDiscretionary Grant</div><div><div>Ref No</div><div></div><div>Skills Programme</div><div></div><div><div>Add Skills Programme</div></div><div>Learner</div><div></div><div><div>Add Learner</div></div><div>Captured Date</div><div>18/10/2011</div><div>Registration Date</div><div>dd/mm/yyyy</div><div>Approval Date</div><div>dd/mm/yyyy</div><div>Small Scale Mining</div><div><input type="checkbox"/></div><div>Skills Programme Status</div><div>Created</div><div>Status Reason</div><div></div><div>Status Effective Date</div><div>dd/mm/yyyy</div><div>Commencement Date</div><div>dd/mm/yyyy</div><div>Completion Date</div><div>dd/mm/yyyy</div><div>Captured By</div><div>Alice Greenwald</div><div>Registered By</div><div></div><div>Approved By</div><div></div></div></div></div> <table><tr><th>Field</th><th>Value</th><th>Rule</th></tr><tr><td>Ref No</td><td>System Generated</td><td></td></tr><tr><td>Skills Programme</td><td>Add Skills Programme</td><td>System will only make SP's linked to Provider Scope available for selection</td></tr><tr><td>Learner</td><td>Add Learner</td><td></td></tr><tr><td>Skills Programme Status</td><td>Default to 'Created'</td><td>Once the user has uploaded required documents, the system allow them to change the status to "Registered"</td></tr><tr><td>Status Reason</td><td>Met Requirements</td><td></td></tr><tr><td>Status Effective Date</td><td>Format dd/mm/yyyy</td><td>Date of capturing</td></tr><tr><td>Commencement Date</td><td>Format dd/mm/yyyy</td><td>Date when learner starts training</td></tr><tr><td>Completion Date</td><td>Format dd/mm/yyyy</td><td>Date when learner will be done with the training</td></tr><tr><td>Captured Date</td><td>System Generated</td><td>Default to the date when SP was captured for learner</td></tr><tr><td>Captured By</td><td>System Generated</td><td>Default to details of person who captured the SP</td></tr><tr><td>Registration Date</td><td>System Generated</td><td>Default to the date when SP was registered</td></tr><tr><td>Registered By</td><td>System Generated</td><td>Default to details of person who reigstered the SP</td></tr><tr><td>Approval Date</td><td>System Generated</td><td>Default to the date when SP was approved</td></tr><tr><td>Approved By</td><td>System Generated</td><td>Default to details of person who approved the SP for certification</td></tr><tr><td>Small Scale Mining</td><td>Tick box</td><td>Should be tick if this is part of the Small Scale Mining Project.</td></tr></table>	Field	Value	Rule	Ref No	System Generated		Skills Programme	Add Skills Programme	System will only make SP's linked to Provider Scope available for selection	Learner	Add Learner		Skills Programme Status	Default to 'Created'	Once the user has uploaded required documents, the system allow them to change the status to "Registered"	Status Reason	Met Requirements		Status Effective Date	Format dd/mm/yyyy	Date of capturing	Commencement Date	Format dd/mm/yyyy	Date when learner starts training	Completion Date	Format dd/mm/yyyy	Date when learner will be done with the training	Captured Date	System Generated	Default to the date when SP was captured for learner	Captured By	System Generated	Default to details of person who captured the SP	Registration Date	System Generated	Default to the date when SP was registered	Registered By	System Generated	Default to details of person who reigstered the SP	Approval Date	System Generated	Default to the date when SP was approved	Approved By	System Generated	Default to details of person who approved the SP for certification	Small Scale Mining	Tick box	Should be tick if this is part of the Small Scale Mining Project.
Field	Value	Rule																																															
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Commencement Date	Format dd/mm/yyyy	Date when learner starts training																																															
Completion Date	Format dd/mm/yyyy	Date when learner will be done with the training																																															
Captured Date	System Generated	Default to the date when SP was captured for learner																																															
Captured By	System Generated	Default to details of person who captured the SP																																															
Registration Date	System Generated	Default to the date when SP was registered																																															
Registered By	System Generated	Default to details of person who reigstered the SP																																															
Approval Date	System Generated	Default to the date when SP was approved																																															
Approved By	System Generated	Default to details of person who approved the SP for certification																																															
Small Scale Mining	Tick box	Should be tick if this is part of the Small Scale Mining Project.																																															

**Step 04** Click on the “Add Agreement” button to save the information captured.



**Step 05** Click on the “Providers” to link the agreement to a provider





Click the “Add Provider” icon







Complete one of the fields and click the “Search” icon

Provider	
Legal Name	<input type="text" value="Bafokeng"/>
Trade Name	<input type="text"/>
SDL No	<input type="text"/>
Company Registration No	<input type="text"/>

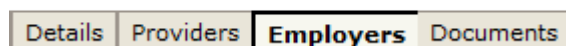
 

Select the Provider Type and then click the “Add” icon

Provider1						
Legal Name	<input type="text"/>				 	
Trade Name	<input type="text"/>					
SDL No	<input type="text"/>					
Company Registration No	<input type="text"/>					

Legal Name	Trading As	SDLNo	Co Reg	Type	View	Add
BAFOKENG RASIMONE MANAGEMENT SERVICES PTY LTD	BAFOKENG RASIMONE MANAGEMENTSERVICES PTY LTD	L820734343	1999/01230/07	Leading Provider		

**Step 06** Click on the “Employers” to link the agreement to an Employer where applicable





Click the “Add Employer” icon




Complete one of the fields and click the “**Search**” icon


Employer	
Legal Name	<input type="text" value="Bafokeng"/>
Trade Name	<input type="text"/>
SDL No	<input type="text"/>
Company Registration No	<input type="text"/>

 Search
  Reset

Select the Employer Type and then click the “**Add**” icon

Employer	
Legal Name	<input type="text" value="Bafokeng"/>
Trade Name	<input type="text"/>
SDL No	<input type="text"/>
Company Reg No	<input type="text"/>

 Search
  Reset

Legal Name	Trading As	SDLNo	Co Reg	Type	Add
BAFOKENG CHROME HOLDINGS	BAFOKENG CHROME HOLDINGS	L070730686 0		Leading Employer	

#### Step 07

Click on the “**Documents**” tab and upload the necessary documents

yers	<b>Documents</b>	Discret
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For Normal Skills Programmes upload:

- A certified copy of the ID document/Passport
- Signed Skills Agreement

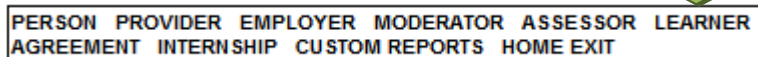
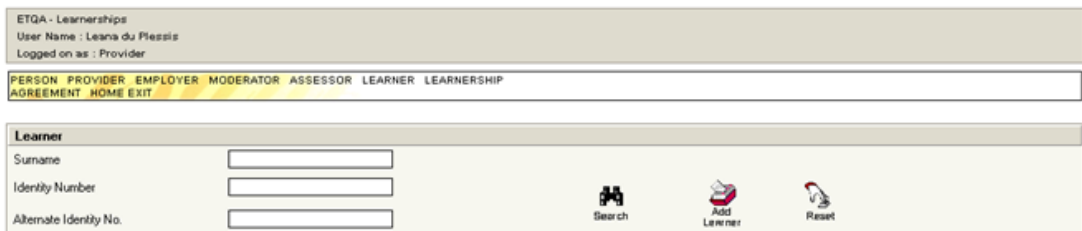
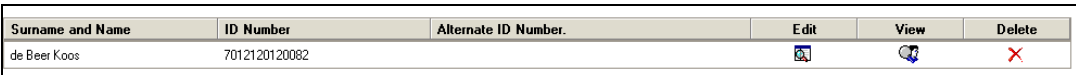
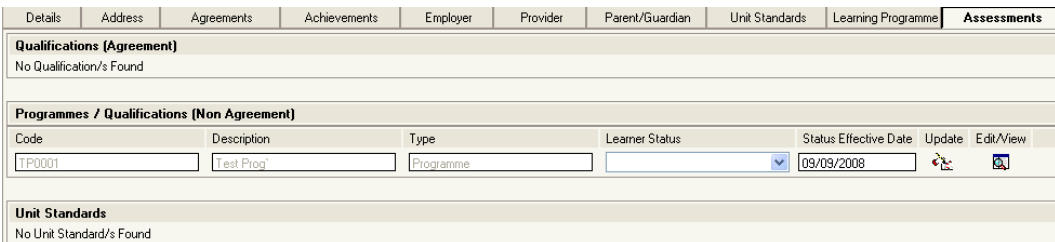
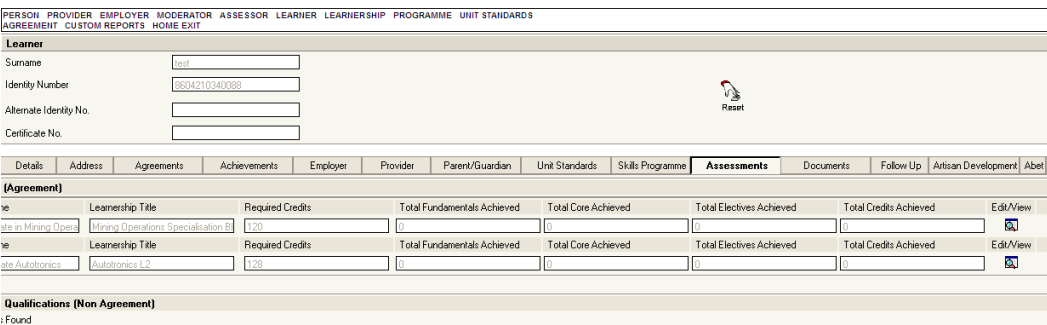
For OHS Skills Programmes upload:

- Certified copy of the ID Document/Passport
- Signed Letter of appointment on a letter head of the Employer (in the case of a safety Rep) OR Election letter (in the case of a Safety Steward)
- Signed Skills Agreement
- Signed Attendance Register

The system will make the Skills Programme Form available for printing:

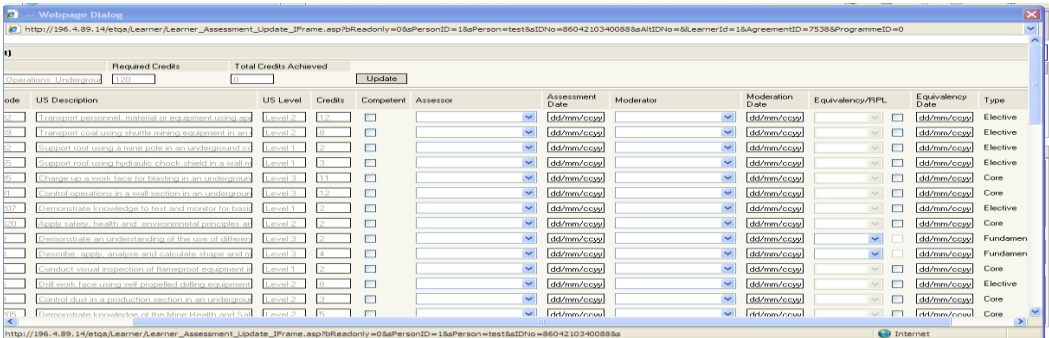
Agreement Ref No	Comments	ID Number	Skills Programme Agreement
SPA/280911/946382		7910225440083	

## E. ADD ASSESSMENTS TO A LEARNER

STEPS	ACTIONS
Step 01	<p>Click on "LEARNER" on the menu bar</p> 
Step 02	<p><b>Search</b> for the LEARNER</p> 
Step 03	<p>Click on the "EDIT" button</p> 
Step 04	<p>Click on the "ASSESSMENTS" tab</p> 
Step 05	<p>Click on <sup>6</sup>edit/view and the following information will be provided for completion</p> 










<sup>6</sup> If your screen is too small you will need to move the page to the right to be able to view the edit/view button













STEPS	ACTIONS
Step 06	<p>Select an ASSESSOR from the dropdown box next to the relevant Unit Standard and complete the assessment date</p> 
Step 07	Select a MODERATOR from the dropdown box (if applicable) and complete the moderation date
Step 08	<sup>7</sup> Complete the Equivalency/RPL if the learner has achieved the fundamental previously
Step 09	<p>Click on the "UPDATE" button.</p> <p><b>NOTE 1:</b> The ASSESSOR field is a compulsory field. The system will not accept the update of the achievement if there is no assessor.</p> <p><b>NOTE 2:</b> Only the ASSESSORS linked to the Provider and where the Unit Standard is par of their scope will appear in the dropdown box</p> <p><b>NOTE 3:</b> The MODERATOR field is not a compulsory field, as only a sample of 10% needs to be moderated as per ETQA requirements.</p> <p><b>NOTE 4:</b> The ASSESSMENT DATE field is a compulsory field.</p> <p><b>NOTE 5:</b> Once the credits for the specific programme has been met by the learner the information will automatically be passed onto the ETQA who will be able to generate a certificate for the learner</p> <p><b>NOTE 6:</b> The learner information will move to the achievement tab once the ETQA has Approved the assessment information and generated the certificate of the learner and all the information can be viewed from this tab. And a statement of result can also be printed</p>





<sup>7</sup> This is only applicable to fundamental unit standards and the learner has achieved e.g. a Matric / Grade 12 at the relevant level of the specific qualification

## F. ADD ABET PROGRAMME TO A LEARNER

STEPS	ACTIONS																														
Step 01	<p>Click on the "ABET. ENROLLMENT" from the Main Menu Bar</p> <p><u>AGREEMENT SKILLS.AGREEMENT ABET.ENROLLMENT</u></p>																														
Step 02	<p>Click on the "Add Form" icon</p> <div></div>																														
Step 03	<p>Complete the following fields:</p> <div><div><div>Learner </div><div>Employer SDL Number </div><div>ABET Programme</div><div>Financial Year</div><div>Time Period</div><div>Source Document</div></div><div><div><div></div><div>Please Select a Learner</div><div>01 April 2012 - 31 March 2013</div><div>Full Time</div><div>Uploading available after Form creation.</div></div></div><div><div>ABET Enrollment Status</div><div>Status Reason</div><div>Status Effective Date</div><div>Commencement Date</div><div><div>Registered</div><div>Met Requirements</div><div>dd/mm/ccyy</div><div>dd/mm/ccyy</div></div></div></div> <table><thead><tr><th>Field</th><th>Value</th><th>Rule</th></tr></thead><tbody><tr><td>Learner</td><td>Add Learner</td><td><ul style="list-style-type: none"><li>Click the Icon  on the learner field</li><li>Search and Add the learner to the Enrollment form</li></ul></td></tr><tr><td>Employer SDL Number</td><td>Employer SDL Number</td><td><ul style="list-style-type: none"><li>Click the Icon  on the Employer SDL Number field</li><li>Search and add the Employer to the Enrollment form</li></ul></td></tr><tr><td>ABET Programme</td><td>Learner ABET Programme</td><td>Select the ABET level from the dropdown list</td></tr><tr><td>Financial Year</td><td>Financial Year</td><td>Select the financial year from the dropdown list</td></tr><tr><td>Time Period</td><td>Time Period</td><td>Select the time period from the dropdown list</td></tr><tr><td>ABET Enrollment Status</td><td>Registered</td><td>System will default the value to "Registered"</td></tr><tr><td>Status Reason</td><td>Met Requirements</td><td>System will default the value to "Met Requirements"</td></tr><tr><td>Status Effective Date</td><td>Format dd/mm/yyyy</td><td>Date of capturing</td></tr><tr><td>Commencement Date</td><td>Format dd/mm/yyyy</td><td>Date when learner starts training</td></tr></tbody></table> <p>Time period will automatically calculate the end date as per the selection of own time, part time or full time. The user will only be able to complete the start date.</p>	Field	Value	Rule	Learner	Add Learner	<ul style="list-style-type: none"><li>Click the Icon  on the learner field</li><li>Search and Add the learner to the Enrollment form</li></ul>	Employer SDL Number	Employer SDL Number	<ul style="list-style-type: none"><li>Click the Icon  on the Employer SDL Number field</li><li>Search and add the Employer to the Enrollment form</li></ul>	ABET Programme	Learner ABET Programme	Select the ABET level from the dropdown list	Financial Year	Financial Year	Select the financial year from the dropdown list	Time Period	Time Period	Select the time period from the dropdown list	ABET Enrollment Status	Registered	System will default the value to "Registered"	Status Reason	Met Requirements	System will default the value to "Met Requirements"	Status Effective Date	Format dd/mm/yyyy	Date of capturing	Commencement Date	Format dd/mm/yyyy	Date when learner starts training
Field	Value	Rule																													
Learner	Add Learner	<ul style="list-style-type: none"><li>Click the Icon  on the learner field</li><li>Search and Add the learner to the Enrollment form</li></ul>																													
Employer SDL Number	Employer SDL Number	<ul style="list-style-type: none"><li>Click the Icon  on the Employer SDL Number field</li><li>Search and add the Employer to the Enrollment form</li></ul>																													
ABET Programme	Learner ABET Programme	Select the ABET level from the dropdown list																													
Financial Year	Financial Year	Select the financial year from the dropdown list																													
Time Period	Time Period	Select the time period from the dropdown list																													
ABET Enrollment Status	Registered	System will default the value to "Registered"																													
Status Reason	Met Requirements	System will default the value to "Met Requirements"																													
Status Effective Date	Format dd/mm/yyyy	Date of capturing																													
Commencement Date	Format dd/mm/yyyy	Date when learner starts training																													

<b>Step 04</b>	Click <b>"Add Form"</b> to link the ABET Programme to the learner																					
																						
<b>Step 05</b>	Click on the <b>"Enrollment Form"</b> pdf icon to download and print the form																					
	<table> <tr> <td>ABET Programme</td><td>ABET 3</td><td>Status Effective Date</td></tr> <tr> <td>Financial Year</td><td>01 April 2011 - 31 March 2012</td><td>Commencement Date</td></tr> <tr> <td>Time Period</td><td>ABET 3 - Part Time</td><td>Completion Date</td></tr> <tr> <td>Registration Date</td><td>2012/02/03</td><td>Registration By</td></tr> <tr> <td>Approval Date</td><td></td><td>Approval By</td></tr> <tr> <td>Termination Date</td><td></td><td>Termination By</td></tr> <tr> <td>Enrollment Form Document</td><td></td><td></td></tr> </table>	ABET Programme	ABET 3	Status Effective Date	Financial Year	01 April 2011 - 31 March 2012	Commencement Date	Time Period	ABET 3 - Part Time	Completion Date	Registration Date	2012/02/03	Registration By	Approval Date		Approval By	Termination Date		Termination By	Enrollment Form Document		
ABET Programme	ABET 3	Status Effective Date																				
Financial Year	01 April 2011 - 31 March 2012	Commencement Date																				
Time Period	ABET 3 - Part Time	Completion Date																				
Registration Date	2012/02/03	Registration By																				
Approval Date		Approval By																				
Termination Date		Termination By																				
Enrollment Form Document																						
<b>Step 06</b>	Click on the <b>"Source Document"</b> pdf icon to upload the necessary documents: <ul style="list-style-type: none"> <li>Signed Enrollment Form</li> <li>Certified copy of ID/Passport</li> </ul>																					
	<table> <tr> <td>Financial Year</td><td>01 April 2011 - 31 March 2012</td><td>Commencement Date</td></tr> <tr> <td>Time Period</td><td>ABET 3 - Part Time</td><td>Completion Date</td></tr> <tr> <td>Registration Date</td><td>2012/02/03</td><td>Registration By</td></tr> <tr> <td>Approval Date</td><td></td><td>Approval By</td></tr> <tr> <td>Termination Date</td><td></td><td>Termination By</td></tr> <tr> <td>Enrollment Form Document</td><td></td><td></td></tr> <tr> <td>Source Document</td><td></td><td></td></tr> </table> <p>The system will not allow capturing of the learner's achievements/competencies if the two documents sated above have not been uploaded.</p>	Financial Year	01 April 2011 - 31 March 2012	Commencement Date	Time Period	ABET 3 - Part Time	Completion Date	Registration Date	2012/02/03	Registration By	Approval Date		Approval By	Termination Date		Termination By	Enrollment Form Document			Source Document		
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Registration Date	2012/02/03	Registration By																				
Approval Date		Approval By																				
Termination Date		Termination By																				
Enrollment Form Document																						
Source Document																						

## G. ADD ACHIEVEMENTS TO THE LEARNER'S ABET PROGRAMME

STEPS	ACTIONS														
Step 01	<div>Click on "<b>LEARNER</b>" on the menu bar</div> <div></div> <div><table><tr><td>PERSON</td><td>PROVIDER</td><td>EMPLOYER</td><td>MODERATOR</td><td>ASSESSOR</td><td>LEARNER</td></tr><tr><td>AGREEMENT</td><td>INTERNSHIP</td><td>CUSTOM REPORTS</td><td>HOME EXIT</td><td></td><td></td></tr></table></div>	PERSON	PROVIDER	EMPLOYER	MODERATOR	ASSESSOR	LEARNER	AGREEMENT	INTERNSHIP	CUSTOM REPORTS	HOME EXIT				
PERSON	PROVIDER	EMPLOYER	MODERATOR	ASSESSOR	LEARNER										
AGREEMENT	INTERNSHIP	CUSTOM REPORTS	HOME EXIT												
Step 02	<div><b>Search</b> for the LEARNER</div> <div><div>ETQA - Learnerships User Name : Leana du Plessis Logged on as : Provider</div><div><table><tr><td>PERSON</td><td>PROVIDER</td><td>EMPLOYER</td><td>MODERATOR</td><td>ASSESSOR</td><td>LEARNER</td><td>LEARNERSHIP</td></tr><tr><td>AGREEMENT</td><td>HOME EXIT</td><td></td><td></td><td></td><td></td><td></td></tr></table></div><div><div><b>Learner</b></div><div><div>Surname</div><div>Identity Number</div><div>Alternate Identity No.</div></div><div><div>Search</div><div>Add Learner</div><div>Reset</div></div></div></div>	PERSON	PROVIDER	EMPLOYER	MODERATOR	ASSESSOR	LEARNER	LEARNERSHIP	AGREEMENT	HOME EXIT					
PERSON	PROVIDER	EMPLOYER	MODERATOR	ASSESSOR	LEARNER	LEARNERSHIP									
AGREEMENT	HOME EXIT														

**Step 03** Click on the **"EDIT"** button

Surname and Name	ID Number	Alternate ID Number.	Edit	View
de Beer Koos	7012120120082			

**Step 04** Click on the **"ABET"** tab

Details	Address	Agreements	Achievements	Employer	Provider	Parent/Guardian	Unit Standards	Skills Programme	Assessments	Documents	Follow Up	Artisan Development	Abet
Programme	Created Date	Duration	From	To	Status	Learning Area	Edit						
ABET 3	2012-02-03	ABET 3 - Part Time	2011-04-01	2012-02-01	Not Yet Competent	...	...						

**Step 05** Click the **"Learning Area"** illicit to update the results of the learning areas

Details	Address	Agreements	Achievements	Employer	Provider	Parent/Guardian		
Programme	Created Date	Duration	From	To	Status	Learning Area	Edit	
ABET 3	2012-02-03	ABET 3 - Part Time	2011-04-01	2012-02-01	Not Yet Competent	...	...	

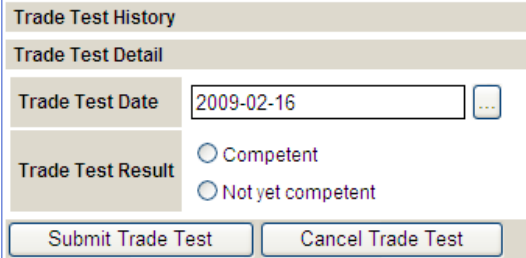
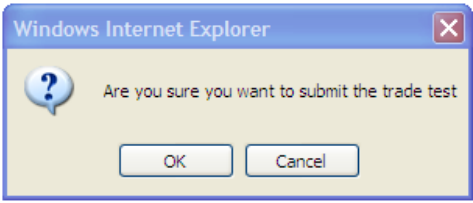
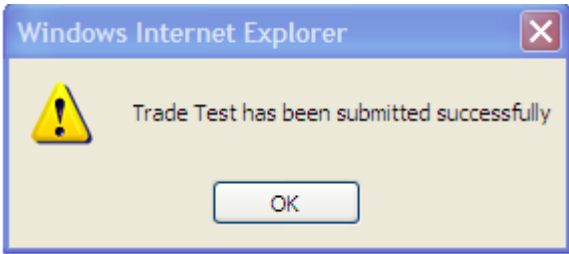
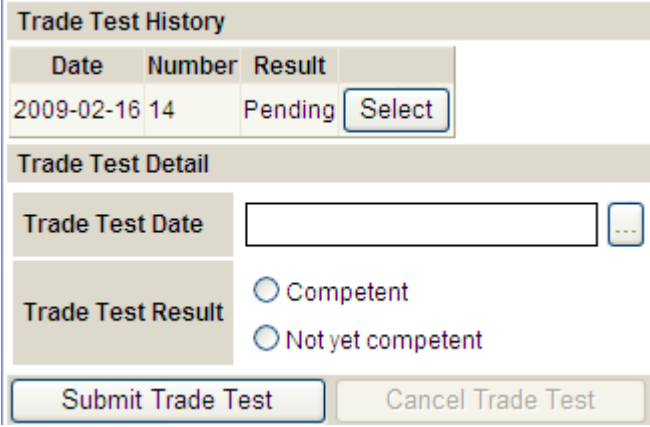
**Step 06** Click the **"Submit"** button to save the information

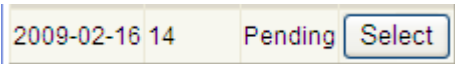
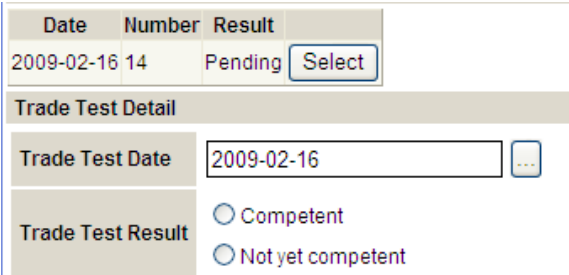
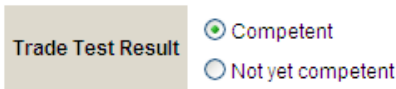
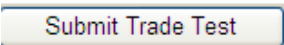
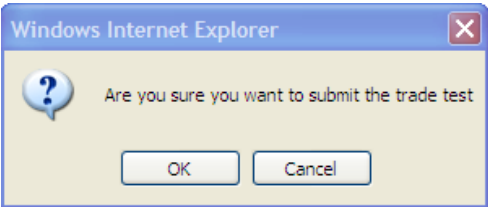
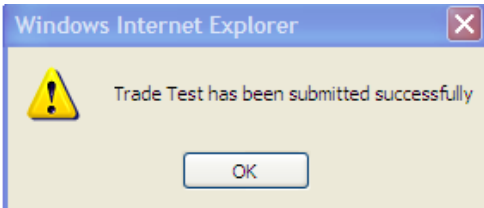
Learning Code	Learning Area	RPL	Assessment Date	Competent
	Communications 03	<input type="checkbox"/>	<input type="text" value="2012-03-28"/>	<input checked="" type="checkbox"/>
	Numeracy 03	<input type="checkbox"/>	<input type="text" value="2012-03-28"/>	<input checked="" type="checkbox"/>

**Step 07** If all the learning areas have been achieved the status will be viewed as competent.

Details	Address	Agreements	Achievements	Employer	Provider		
Programme	Duration	From	To	Status	Learning Area	Edit	
ABET 4	ABET 4 - Full Time	2009-01-14	2010-07-14	Competent	...	...	

## H. ADD TRADE TEST

STEPS	ACTIONS
<b>Step 01</b>	Click on the illicit to populate the date
<b>Step 02</b>	Click submit trade test
<b>Step 03</b>	Click OK: <div>   </div>
<b>Step 04</b>	The system has now successfully submitted the trade test <div>   <p>The system will only show a trade test number from 3 days of the test</p> </div>
<b>Step 05</b>	Close the Window

STEPS	ACTIONS
<b>Step 06</b>	<p>If the learner has completed his trade test you come back into the MOD/US screen and click on select.</p>  <p>Wait for the date to populate in the trade test date space</p> 
<b>Step 07</b>	<p>Mark the result; competent or not yet competent</p> 
<b>Step 08</b>	<p>Click on submit trade test</p> 
<b>Step 09</b>	<p>Click ok</p> 
<b>Step 10</b>	<p>If the learner was not yet competent the system will allow you to generate a new trade test date and the history of all previous trade tests will remain visible.</p> 

STEPS

Step 11

ACTIONS

The system automatically captures the result. You may now exit the page.

Trade Test History

Date	Number	Result	
2009-02-16	14	Competent	Select

Trade Test Detail

Trade Test Date

...

Trade Test Result

☐ Competent

☐ Not yet competent

Please note the following will now be available

16Q160052001463 Learnership towards National Certificate Diesel Mechanic - Open Cast 2009-02-13 2010-02-13 Competent


...

...

[View](#) [View](#)

Statement of Results:

4th Floor Union Corporation Building,  
74-78 Marshall Street, Marshalltown,  
Johannesburg  
Private Bag X118, Marshalltown, 2107  
Tel: 011 630 3500 Fax: 011 832 1027



Statement of Results

This is to confirm that :

Learner Name	FLORUS PRINSLOO
ID Number	5507145072087
Employer	Test Khomotso
Reference No	16Q160052001463

was enrolled in the Skills Programme : Learnership towards National Certificate Diesel Mechanic - Open Cast and was assessed and found competent in the following unit standards


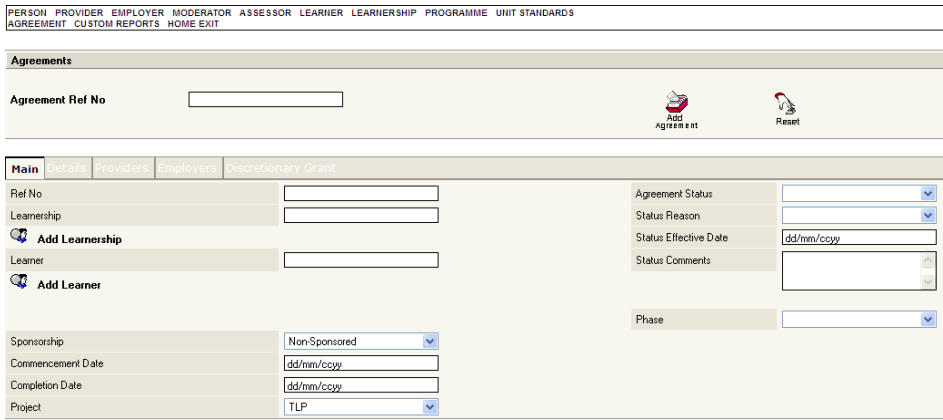
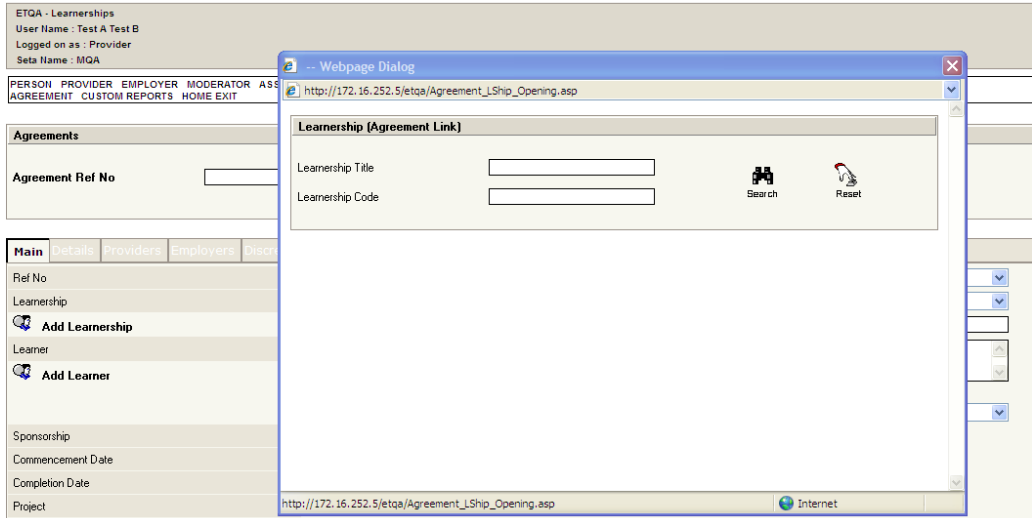
Unit Standard Code	Unit Standard Title
KF	Make and fit a key
PN-5	Construct a circuit controlled from two points
SIL	Service an engine with an in-line or distributor f
OUT665	Maintain a Vehicle - Open Cast
OUT63	Repair Tyres
MMG	Maintain a pedestal grinder
OUT66	Repair Clutches
DPA	Tune-up an engine fitted with a distributor or in-
PN-3	Fit and adjust a service unit

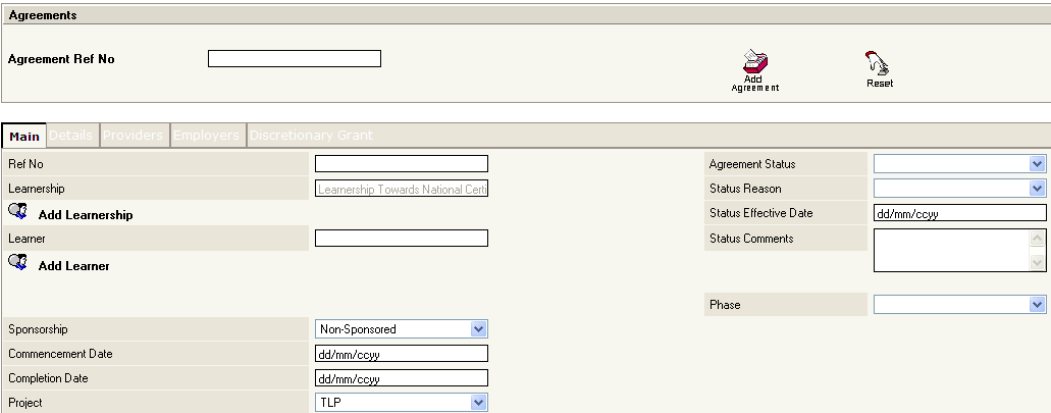
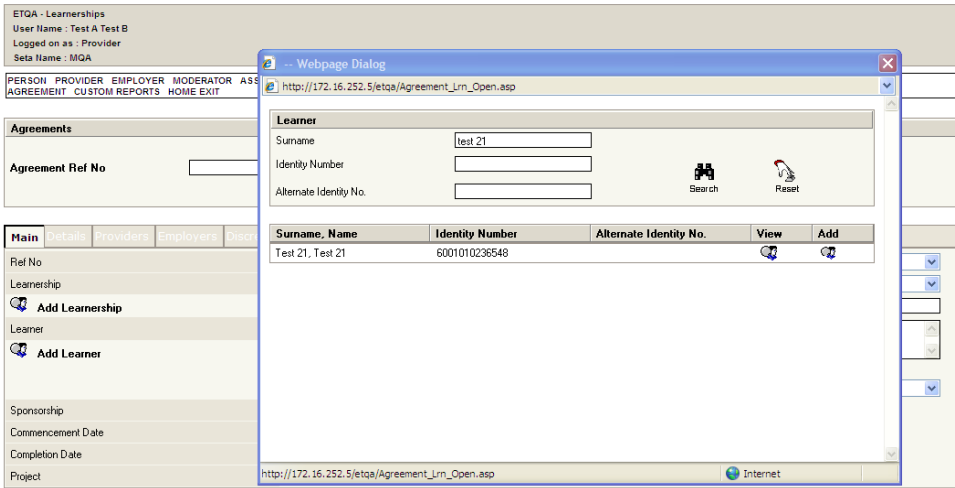
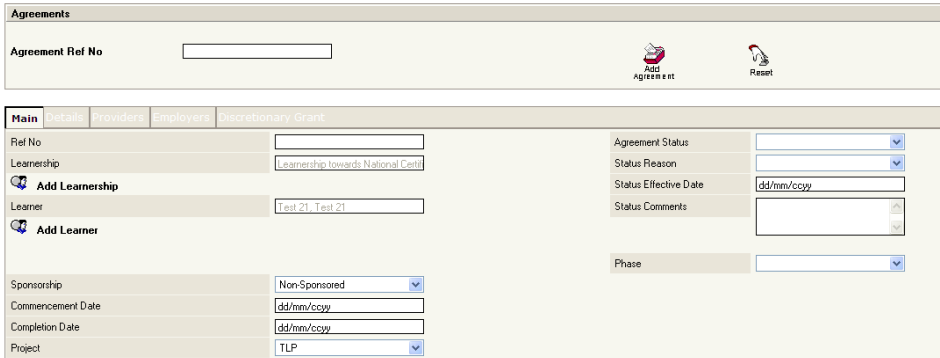
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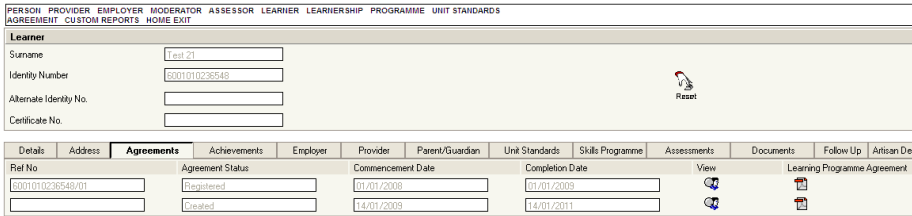
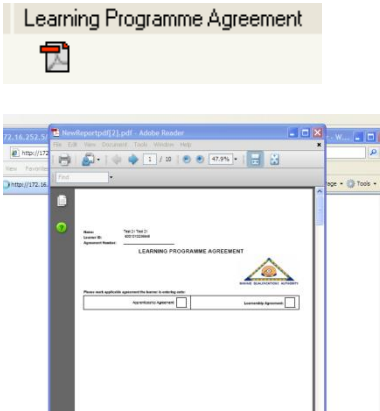


## I. ADD LEARNING PROGRAMME AGREEMENT (LEARNERSHIP) TO A LEARNER

Once a learner has been added to the system and should be added to a learnership or apprenticeship agreement the following steps should be followed;

STEPS	ACTIONS
Step 01	<p>Click on the agreement tab on the main menu</p>  <p>The screenshot shows the main menu with tabs: PERSON, PROVIDER, EMPLOYER, MODERATOR, ASSESSOR, LEARNER, LEARNERSHIP, PROGRAMME, UNIT STANDARDS, AGREEMENT, CUSTOM REPORTS, HOME EXIT. The 'Agreement' tab is selected. Below the tabs, there is a section titled 'Agreements' with input fields for 'Agreement Ref No' and 'ID Number'. To the right of these fields are three icons: 'Search', 'Add Agreement', and 'Reset'.</p>
Step 02	<p>Click on the add agreement icon</p>  <p>The screenshot shows the 'Add Agreement' form. It has a top navigation bar with the same tabs as the main menu. Below the tabs, there is a section titled 'Agreements' with an input field for 'Agreement Ref No'. To the right of this field are two icons: 'Add Agreement' and 'Reset'. Below this section, there is a 'Main' tab selected, showing a form with various fields: 'Ref No', 'Learnership', 'Learner', 'Sponsorship' (with a dropdown menu), 'Commencement Date', 'Completion Date', 'Project', 'Agreement Status' (with a dropdown menu), 'Status Reason' (with a dropdown menu), 'Status Effective Date' (with a date picker), 'Status Comments' (with a text area), and 'Phase' (with a dropdown menu). There are also 'Add Learnership' and 'Add Learner' buttons.</p>
Step 03	<p>Click on the add learnership icon</p>  <p>The screenshot shows the 'Add Learnership' form with a 'Webpage Dialog' window open. The dialog window is titled 'Webpage Dialog' and shows the URL 'http://172.16.252.5/etqa/Agreement_LShip_Opening.asp'. The dialog window has a section titled 'Learnership (Agreement Link)' with input fields for 'Learnership Title' and 'Learnership Code'. To the right of these fields are two icons: 'Search' and 'Reset'. The background shows the 'Add Learnership' form with the 'Main' tab selected, showing the same fields as in Step 02.</p>


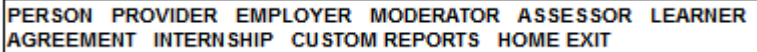
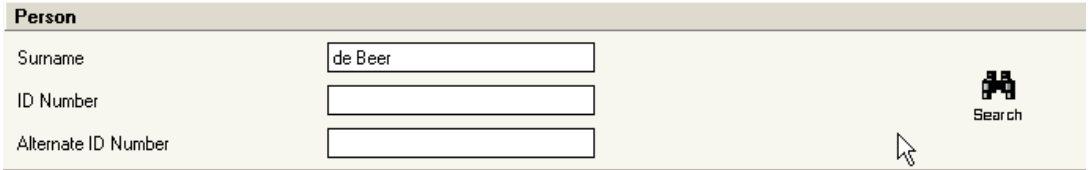
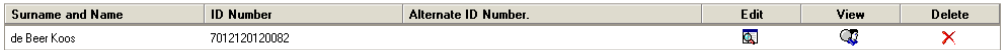

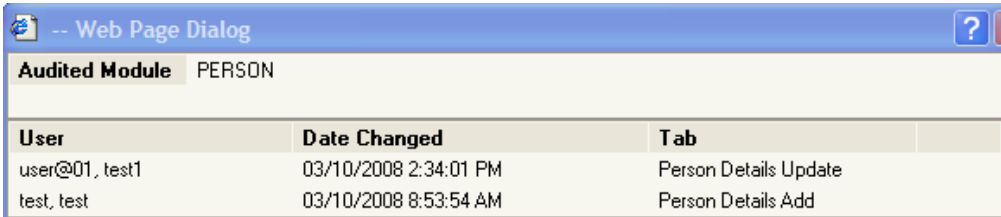
STEPS	ACTIONS
Step 04	<p>Complete the learnership fields and select add</p> 
Step 05	<p>Select the add learner</p>  <p>Type in the learner details. It is always preferred that the learner ID be typed in as this is the most unique number and only one record will be pulled in. Once you have done this click on the add button</p>
Step 06	<p>Complete all the other fields</p> <p>Please take extra care when selecting the Learnership type (Artisan vs. Non Artisan) as this determines the way the achievements display as well as the information on the certificate.</p> 

STEPS	ACTIONS
Step 07	<p>Click on add agreement</p> <p>Please note that all the fields in the sub menu bar will now become available.</p> <p>The status of the agreement will be “<b>Created</b>”. It is <b>IMPORTANT</b> to note that the system will not allow the provider to add assessments to the achievements tab of the learner for as long as the agreement status is in Created or Terminated status. Therefore it is important to send the signed contract to the MQA to get it registered by changing the agreement status to “<b>Registered</b>”.</p>
Step 08	Click on provider and add the provider details
Step 09	<p>Click on employer and add the employer details</p> <p><b>Note:</b> The agreement will not be available to print on the agreement page of the Learner profile if the Employer is not linked to the agreement.</p>
<sup>8</sup> Step 10	Click on update agreement
Step 11	Click on learner on the main menu bar
Step 12	Search for the learner
Step 13	<p>Click on the agreements on the sub menu bar</p>  <p>You will see that the agreement has been created and can download or print the learning programme agreement – only if the agreement is linked to the Employer.</p>  <p>Once the Learning programme agreement has been completed the necessary procedures comply in getting it signed and sent to MQA for registration. Once the MQA has validated the agreement a registered status will be provided to the learner and a reference number</p>






















<sup>8</sup> Please note that the information that is not complete on the learner information as well as the agreement will not pull through to the learning programme agreement.

will be generated.


## J. UPDATE PERSONAL DETAILS OF A LEARNER

STEPS	ACTIONS
Step 01	<p>Click on "PERSON" on the menu bar</p>  
Step 02	<p><b>Search</b> for the PERSON</p> 
Step 03	<p>Click on the "EDIT" button</p> 
Step 04	<p>Update the relevant information</p>
Step 05	<p>Click on the "UPDATE PERSON" button</p>  <p><b>NOTE 1:</b> It is important to know that all changes will be captured in the audit trail. Detail of the last update on the information can be seen at the bottom of the person screen</p>  <p><b>NOTE 2:</b> You can only update PERSONAL details of the LEARNER on the PERSON page, for example, address information or contact details. To edit details regarding the learner status for example, you need to go to the LEARNER and edit the details there.</p>


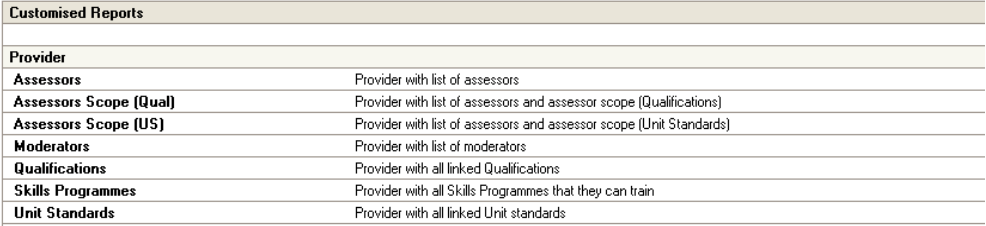
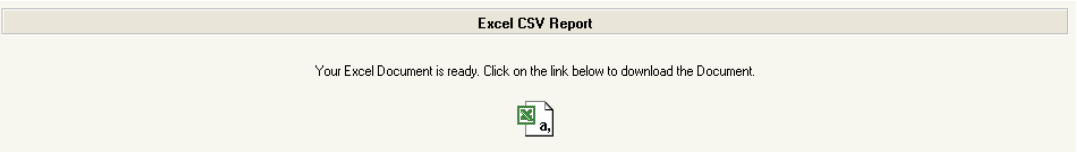
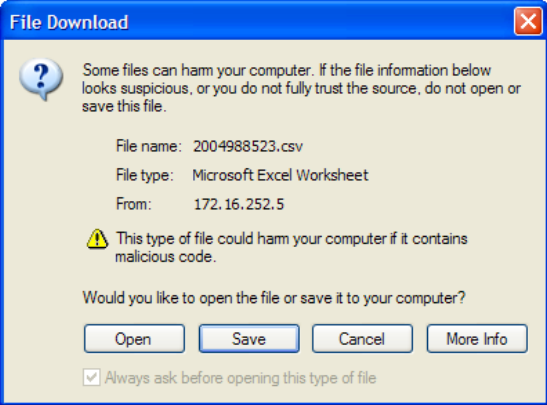
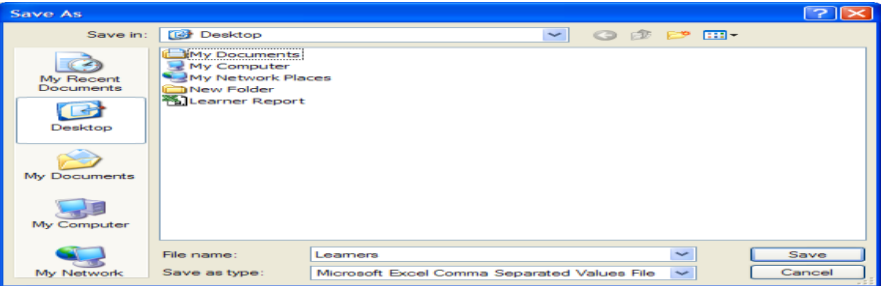
## K. VIEW THE SCOPE OF AN ASSESSOR

STEPS	ACTIONS														
Step 01	<p>Click on "ASSESSOR / MODERATOR" on the menu bar</p> <div></div> <div><div>PERSON PROVIDER EMPLOYER MODERATOR ASSESSOR LEARNER</div><div>AGREEMENT INTERNSHIP CUSTOM REPORTS HOME EXIT</div></div>														
Step 02	<p><b>Search</b> for the ASSESSOR / MODERATOR</p> <div><div><div>Assessor</div><div><div>Surname</div><div>ID Number</div><div>Alternate ID Number</div><div>Assessor Registration No</div></div><div><div> Search</div><div> Add Assessor</div><div> Reset</div></div></div></div>														
Step 03	<p>Click on the "VIEW" button</p> <table><tr><th>Surname and Name</th><th>ID Number</th><th>Alternate ID Number</th><th>Assessor Registration No</th><th>Edit</th><th>View</th><th>Delete</th></tr><tr><td>Waugh Chris</td><td>4503305018086</td><td></td><td>617/ASS/00002/04</td><td></td><td></td><td></td></tr></table>	Surname and Name	ID Number	Alternate ID Number	Assessor Registration No	Edit	View	Delete	Waugh Chris	4503305018086		617/ASS/00002/04			
Surname and Name	ID Number	Alternate ID Number	Assessor Registration No	Edit	View	Delete									
Waugh Chris	4503305018086		617/ASS/00002/04												
Step 04	<p>Click on the "UNIT STANDARDS / QUALIFICATION /SKILLS PROGRAMMES" tab to view the scope</p> <div><div><div>Assessor</div><div><div>Surname</div><div>ID Number</div><div>Alternate ID Number</div></div><div><div> Add Assessor</div><div> Reset</div></div></div><div><div><div>Main</div><div>Address</div><div>Unit Stds</div><div>Quals</div><div>Provider</div><div>Skills Programmes</div></div><table><tr><th>Qualification Code</th><th>Qualification Desc</th><th>View Qualification</th></tr><tr><td>Abet 4</td><td>Abet 4</td><td></td></tr><tr><td>Solutions Development/Programme</td><td>Level 5</td><td></td></tr></table></div></div> <p><b>NOTE:</b> The scope of the Assessor is the Qualifications /Skills programmes or Unit Standards that the MQA has approved for the Assessor due to certain compliances that needed to be checked as well as relevant technical competencies the assessor required.</p>	Qualification Code	Qualification Desc	View Qualification	Abet 4	Abet 4		Solutions Development/Programme	Level 5						
Qualification Code	Qualification Desc	View Qualification													
Abet 4	Abet 4														
Solutions Development/Programme	Level 5														

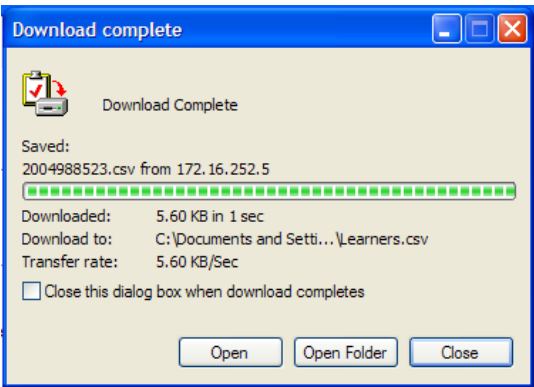
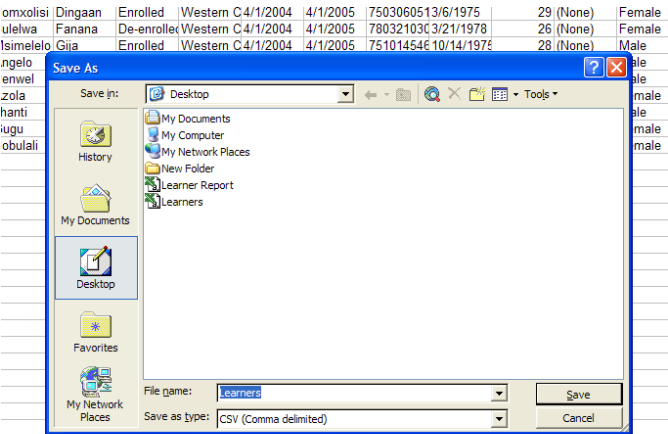
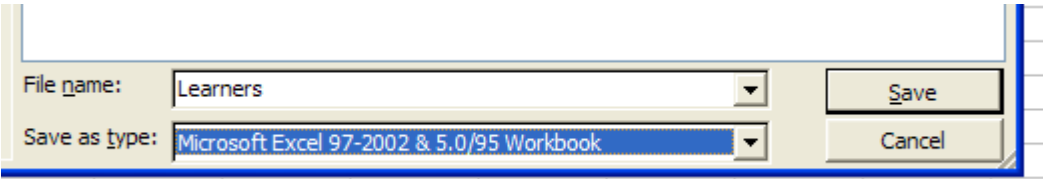
## L. SEARCH FUNCTION

STEPS	ACTIONS
Step 01	<p>To do a search you need to fill in one of the three fields.</p> <div><div>Person</div><div><div>Surname</div><div>de Beer</div></div><div><div>ID Number</div><div></div></div><div><div>Alternate ID Number</div><div></div></div><div><div>Search</div></div></div>
Step 02	Click on the " <b>SEARCH</b> " button

## M. PRINTING REPORTS

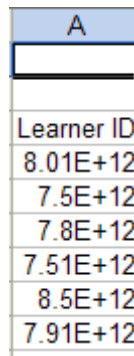
STEPS	ACTIONS
Step 01	<p>Click on Custom Reports</p> 
Step 02	<p>Click on the report that you want to download</p> 
Step 03	<p>Click on the Excel icon</p> 
Step 04	<p>Click on the “SAVE” button</p> 
Step 05	<p>Select the place where you want to save this report in the “Save in” dropdown box.</p> 



STEPS	ACTIONS
Step 06	<p>Click on the open button</p> 
Step 07	<p>The file is going to open in Excel but the format is CSV. Click on “File”, then click on “Save As”. The next “Save As” box will appear like in the picture below.</p>  <p>Change the “Save as type:” from “CSV (Comma delimited)” to “Microsoft Excel 97 – 2002 &amp; 5.0/95 Workbook</p>  <p>Click on the “Save” button</p>
Step 08	<p>Delete the two (2) blank rows at the top of the spreadsheet by highlighting the rows, right click, and select “Delete” from the menu that pops up.</p>

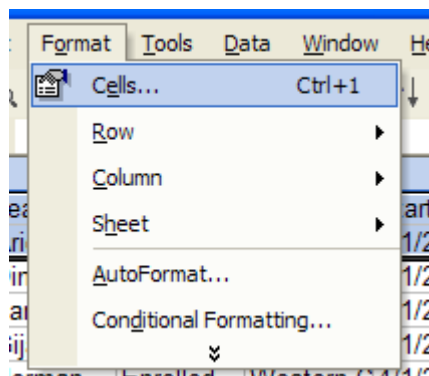
STEPS	ACTIONS
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**Step 09** Change the format of the “Learner ID” column

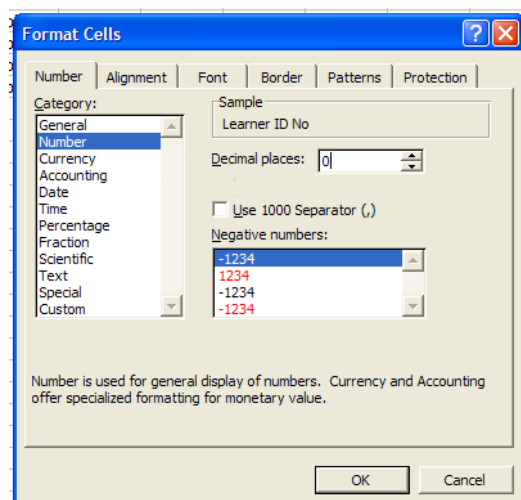


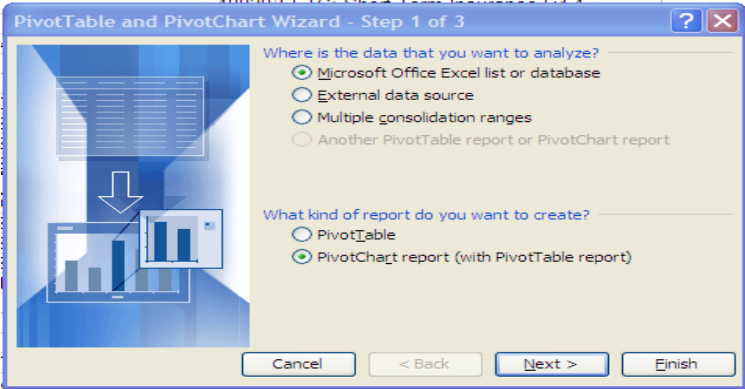
A
Learner ID
8.01E+12
7.5E+12
7.8E+12
7.51E+12
8.5E+12
7.91E+12

Click on the “A” at the top of the column to select the whole column. Click on “Format” then click on “Cells”



Select the “Number” tab. Select “Number” in the “Category” box. Change the “Decimal places” to “0”. Click on the “OK” button. This will change the ID number into the correct format.



STEPS	ACTIONS
<p><b>Step 10</b></p>	<p>Other excel functionalities:</p> <p>If you require some statistical data from your report that you have selected the following can be done.</p> <p>Step 1: Open the report and auto filter all the fields  Step 2: Place your cursor on any of the rows  Step 3: On the data tab select pivot table</p>  <p>Step 5: Select pivot chart report (with pivot table report)  Step 6: Follow the next buttons and finish</p>

## **N. GLOSSARY**

### **1. Achievements:**

An achievement is when a student has been found competent in a Qualification /Skills Programmes or set of Unit Standards etc

### **2. Add US:**

“Add US” refers to linking a single Unit Standard to a Learner.

### **3. Agreements:**

The Agreement on the system is the Learnership Agreement that the Learning Programmes Unit of MQA registered on the system. The Learnership, Learner details, Commencement Date and End Date gets captured in the Agreement. The Agreement also gets linked to the Provider and the Employer so you will be able to see the Agreements linked to you as a Provider.

### **4. Alternate ID:**

The Alternate ID is an Identity Document other than the RSA Identity Document, for example a Student Number or a Drivers Licence Number.

### **5. Assessments:**

Assessments are the assessment that is been done by an Assessor.

### **6. Assessment Date:**

Assessment Date is the date on which the assessment for a specific Unit Standard took place.

### **7. Assessor:**

The Assessor is the person with the necessary competencies who assesses Unit Standards and has been registered by the MQA ETQA.

### **8. Audit Trail:**

Audit Trail is a tool in the system that we use to track changes that has been made by individuals. With the Audit Trail we will be able to see who did what changes where and when.

### **9. Code:**

This code refers to the SAQA Unit Standard Code. The reason why we use SAQA codes is because we need to upload information of the learners onto the NLRD.

### **10. Edit:**

To “Edit” something is to make changes to records on the database. For example Learner contact details, or status changes. Very important to remember that all the changes get recorded in the database for future reference.

**11. ETQA/Lship:**

The system consists out to two parts, the Skills system and the ETQA/Learnership system. To logon to the ETQA System you need to select the ETQA/Lship option from the dropdown box when you log in with your username and password.

**12. Field:**

Field refers to the dropdown boxes or the spaces where you can capture any data in.

**13. Generic Search:**

A Generic Search refers to a general search, in other words, when you are looking for a list of the learners in your system you can use “%%” and then the system will give you all the learners link to your profile, or when you use “a%” the system is going to give you all the learners who’s surname starts with an “A”. When you search you need to use a minimum of 3 characters.

**14. Learner**

A Learner in the system is a Person who is in enrolled in a Programme (Learnership, skills programme, learning programme etc)

**15. Learning Programme**

A Learning Programme is not a programme that is used by more than one SETA. MQA needs to apply to SAQA to use certain unit standards within a specific qualification and SAQA registers this for MQA based on certain criteria.

**16. LP**

LP refers to a Learning Programme.

**17. Moderator**

The Moderator is the person with the necessary competencies to moderate the assessments of Unit Standards and that is registered by MQA.

**18. Person**

A Person in the system is somebody without a Learner-, Assessor-, or Moderator Status. The information on Person is personal information and information that needed to be uploaded to the NLRD like gender, equity, contact numbers and Address. If you need to do any changes on personal information for example a contact number that changed, you will search for the learner under Person and make the necessary changes.

**19. Provider**

A Provider in the system is an organisation that has been fully/ provisionally accredited OR programme approved by MQA to provide training. It is important to know that you can only access your information once it has been uploaded on the system by MQA ETQA.

**20. Qualification**

A Qualification refers to Qualifications that are registered at SAQA namely and in this case quality assured by MQA:

**21. Scope**

The Scope of the Assessor/Provider is the Unit Standards that the Assessor/Provider is either competent in or has the technical competencies to provide training in.

**22. Scope of an Assessor**

The scope of the Assessor is the Unit Standards that the Assessor is either competent in or has the technical competencies.

**23. Search**

Search is a function available in the system that one can use when you need to find a specific Learner/Assessor/Moderator.

**24. Stakeholder**

Stakeholder refers to the MQA's Stakeholders.

**25. Unit Standard**

Unit Standard refers to the Unit Standards registered at SAQA

**26. Update**

Update refers to saving information that changed in the system. For Example if you changed the contact details of a learner, you are going to click on the "Update Person" button to save the change that you have made to the details.

**27. View**

To "View" means that you won't be able to make any changes to the information, but you will see the information.

[illegible]



[illegible]

