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Giude Lines on How to Capture Learner

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| **Organisation:** | FPMSETA |
| **Project name:** | Giude Lines on How to Capture Learner |

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# System Access

Step1: Go to the website [www.fpmseta.org.za](http://www.fpmseta.org.za/)



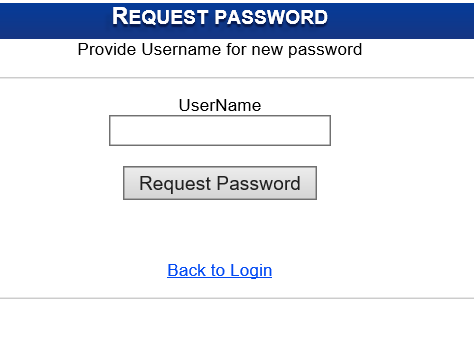
Step 2: Click on Login into **Stakeholder Login**

****

Step 3: Enter your **username and password**.

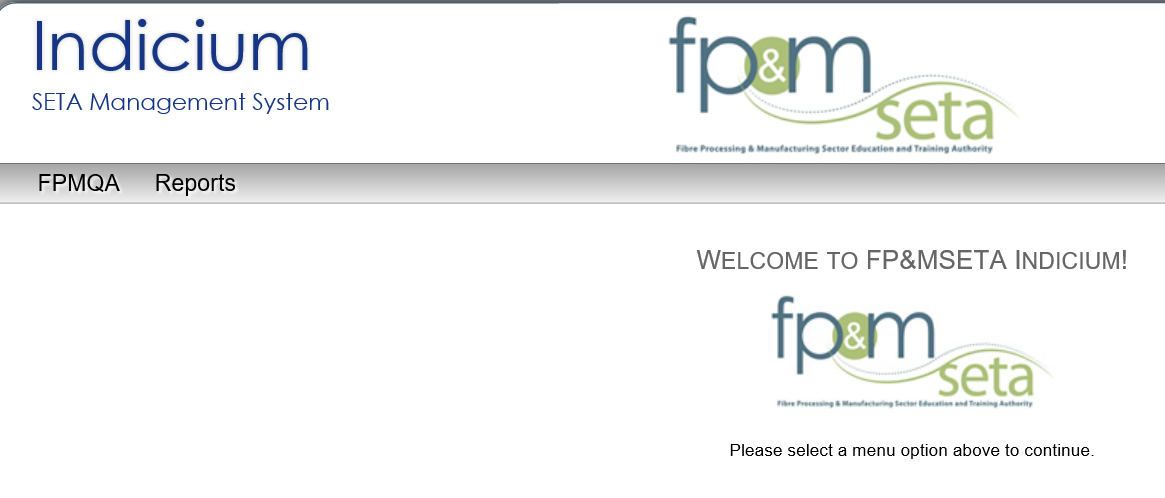


To reset password



# General

To change the layout of you Sub-menus click on the Arrow on the far-right on the system screen.



# Learner

The following steps needs to be followed to create a new Learner on Indicium:

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | **Screenshot** |
| 1. | Login into the system |  |
| 2. | Click on the ***ETQA*** menu item |  |
| 3. | Click on  ***Learner***  from the ***ETQA Menu*** |  |

# Capturing Learner Details

This section allows users to search and add new learners .

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Click ***ETQA*** in the Main Menu | |  |
| 2. | Click on ***Person*** from the ***ETQA Menu*** | |  |
| 3. | Click on the ***Create New*** button | |  |
| 4. | Capture the persons details | |  |
| 5. | Click on the ***Save***button to save the information captured | |  |
| 6. | Click on **Learners** on the ETQA Menu | |  |
| 7. | Click on the ***Create New*** button | |  |
| 8. | Add search criteria and click on search | |  |
| 9. | Person records that meet the criteria will display. Click on the record and select **Create** | |  |
| 11. | To search for a learner record, add search criteria and search. The records will come up, select the record | |  |

# 

# Registration of Programmes against Learners

The section below outlines the process for Registering of Programmes against a learner

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Click ***ETQA*** in the Main Menu | |  |
| 2. | Click on ***Learners*** rom the ETQA Menu | |  |
| 3. | Add ***Search criteria***to search for the person details | |  |
| 4. | Select the Learner that needs to be registered .The row will be highlighted when selected | |  |
| 5. | Click on the magnifying glass icon to open | |  |
| 6. | The system opens the ***Learner*** Menu | |  |
| 7. | Click on ***Programme Registrations*** | |  |
| 8. | ***Programme Registrations:*** This allows the user to capture Learning Programmes against a learner. | |  |

## Programme Registrations: Unit Standards

This section allows users to change data added.

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Unit Standards*** | |  |
| 2. | Click on ***Add Unit Standard*** | |  |
| 3. | Add ***Search criteria***to search for the provider, unit standard and employer details. Add all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations: Qualification

This section allows users to register learners.

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Qualification*** | |  |
| 2. | Click on ***Qualification*** | |  |
| 3. | Add ***Search criteria***to search for the provider, unit standard and employer details. Add all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations: Skills Programme

This section allows users to register learners.

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Skills Programmes*** | |  |
| 2. | Click on ***Add Skills Programmes*** | |  |
| 3. | Add ***Search criteria***to search for the provider, unit standard and employer details. Add all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations: Learnerships

This section allows users to register learners

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Learnerships*** | |  |
| 2. | Click on ***Add Learnerships*** | |  |
| 3. | Add ***Search criteria***to search for the provider, unit standard and employer details. Add all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations: AET

**This section allows users to register learners to AET**

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***AET*** | |  |
| 2. | Click on ***Add AET*** | |  |
| 3 | Add ***Search criteria***to search for the provider, unit standard and employer details. Add all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations:Bursary

**This section allows users to register learners.**

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under theProgramme Registration tab Click **Bursary** | |  |
| 2. | Click on **Add Bursary** | |  |
| 3 | Add ***Search criteria***to search for the Employer , Financial Year and all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations:Internship

**This section allows users to register learners against internship**

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under theProgramme Registration tab Click **Internship** | |  |
| 2. | Click on **Add Internship** | |  |
| 3 | Add ***Search criteria***to search for the Employer , Financial Year and all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

## Programme Registrations:Work Experience

**This section allows users to register learners against Work experience**

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Within the Learner details under theProgramme Registration tab Click **Work Experience** | |  |
| 2. | Click on **Add Work Experince** | |  |
| 3 | Add ***Search criteria***to search for the Employer , Financial Year and all the detail related to the linking | |  |
| 4. | Click on Save or cancel | |  |
| 5. | When wanting to update, click on the record to highlight it | |  |
| 6. | Click on View to see the information or Edit to change details | |  |

# Programmes Assessments against Learners

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Click ***ETQA*** in the Main Menu | |  |
| 2. | Click on ***Learners*** rom the ETQA Menu | |  |
| 3. | Add ***Search criteria***to search for the person details | |  |
| 4. | Select the Learner that needs to be registered .The row will be highlighted when selected | |  |
| 5. | Click on the magnifying glass icon to open | |  |
| 6. | The system opens the ***Learner*** Menu | |  |
| 7. | Click on ***Programme Assessments*** | |  |
| 8. | ***Programme Assessments:*** This allows the user to Assess Learning Programmes against a learner. | |  |

## Programme Assessments: Unit Standards

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Unit Standards*** |  |
| 2. | Select the line item to upload assessments |  |
| 3. | Click on ***View*** to see assessments uploaded |  |
| 4. | Click on ***Update*** to capture or edit any assessments |  |
| 5. | Search for an Assessor/moderator/verifier using the magnifying glass icon |  |
| 6. | Search for an assessor/moderator/ verifier, highlight the record |  |
| 7. | Click on ***Select*** |  |
| 8. | Select which unit standards to be updated and which should be marked as competent. OR the unit standards can be marked individually with the tick boxes |  |
| 9. | Click on ***Update Assessments*** to save the assessments |  |
| 10. | Click on the red cross next to a unit standards to remove assessments |  |

## Programme Assessments: Qualifications

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Qualifications*** |  |
| 2. | Select the line item to upload assessments |  |
| 3. | Click on ***View*** to see assessments uploaded |  |
| 4. | Click on ***Update*** to capture or edit any assessments |  |
| 5. | Search for an Assessor/moderator/verifier using the magnifying glass icon |  |
| 6. | Search for an assessor/moderator/ verifier, highlight the record |  |
| 7. | Click on ***Select*** |  |
| 8. | Select which unit standards to be updated and which should be marked as competent. OR the unit standards can be marked individually with the tick boxes |  |
| 9. | Click on ***Update Assessments*** to save the assessments |  |
| 10. | Click on the red cross next to a unit standards to remove assessments |  |

## Programme Assessments: Skills Programme

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Skills Programme*** |  |
| 2. | Select the line item to upload assessments |  |
| 3. | Click on ***View*** to see assessments uploaded |  |
| 4. | Click on ***Update*** to capture or edit any assessments |  |
| 5. | Search for an Assessor/moderator/verifier using the magnifying glass icon |  |
| 6. | Search for an assessor/moderator/ verifier, highlight the record |  |
| 7. | Click on ***Select*** |  |
| 8. | Select which unit standards to be updated and which should be marked as competent. OR the unit standards can be marked individually with the tick boxes |  |
| 9. | Click on ***Update Assessments*** to save the assessments |  |
| 10. | Click on the red cross next to a unit standards to remove assessments |  |

## Programme Assessments: Learnerships

|  |  |  |
| --- | --- | --- |
| **Step** | **Action** | **Screenshot** |
| 1. | Within the Learner details under the Programme Registration tab Click ***Learnerships*** |  |
| 2. | Select the line item to upload assessments |  |
| 3. | Click on ***View*** to see assessments uploaded |  |
| 4. | Click on ***Update*** to capture or edit any assessments |  |
| 5. | Search for an Assessor/moderator/verifier using the magnifying glass icon |  |
| 6. | Search for an assessor/moderator/ verifier, highlight the record |  |
| 7. | Click on ***Select*** |  |
| 8. | Select which unit standards to be updated and which should be marked as competent. OR the unit standards can be marked individually with the tick boxes |  |
| 9. | Click on ***Update Assessments*** to save the assessments |  |
| 10. | Click on the red cross next to a unit standards to remove assessments |  |

# Programmes Achievements against Learners

The section below outlines the Programmes achieved against a Learner once they have been QA Approved and marked as achieved.

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Click ***ETQA*** in the Main Menu | |  |
| 2. | Click on ***Learners*** rom the ETQA Menu | |  |
| 3. | Add ***Search criteria***to search for the person details | |  |
| 4. | Select the Learner that needs to be registered .The row will be highlighted when selected | |  |
| 5. | Click on the magnifying glass icon to open | |  |
| 6. | The system opens the ***Learner*** Menu | |  |
| 7. | Click on ***Programme Assessments*** | |  |
| 8. | ***Programme Assessments:*** This allows the user to Assess Learning Programmes against a learner. | |  |
| 9. | Open programme and click on **ETQA Approve Assessments** | |  |
| 10. | The programme will move from assessments to the **Achievements tab** | |  |
| 11. | ***Programme Achievements:*** This allows the user to view Learning Programme Assessments against a learner | |  |
| 12. | Achievements can be viewed from this tab | |  |

# Employment Placement

This section will assist the QA to monitor the workplace placement of Learners. The section will display the following

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Click ***ETQA*** in the Main Menu | |  |
| 2. | Click on ***Learners*** rom the ETQA Menu | |  |
| 3. | Add ***Search criteria***to search for the person details | |  |
| 4. | Select the Learner that needs to be registered .The row will be highlighted when selected | |  |
| 5. | Click on the magnifying glass icon to open | |  |
| 6. | The system opens the ***Learner*** Menu | |  |
| 7. | Click on ***Employment Placement*** | |  |
| 8. | Capture the detail for the ***Learner*** | |  |

# Learners supporting Document

The section below outlines the process for Learner Supporting Document

|  |  |  |  |
| --- | --- | --- | --- |
| **Step** | | **Action** | **Screenshot** |
| 1. | Click ***ETQA*** in the Main Menu | |  |
| 2. | Click on ***Learners*** rom the ETQA Menu | |  |
| 3. | Add ***Search criteria***to search for the person details | |  |
| 4. | Select the Learner that needs to be registered .The row will be highlighted when selected | |  |
| 5. | Click on the magnifying glass icon to open | |  |
| 6. | The system opens the ***Learner*** Menu | |  |
| 7. | Click on ***Learner Supporting Documents*** | |  |
| 8. | ***Learner Supporting Documents :*** This allows the user to uploading supporting documnents . | |  |
| 9. | **Click on New Documnet** | |  |
| 10. | **Select the drop down** with to select the document you want to upload | |  |
| 11. | ***Click on Borwse*** *to upload documents*  Then*Click on* ***Save*** | |  |

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| **Additional Notes** |
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