

LEARNER MANAGEMENT

Training Manual



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1 OVERVIEW

Microsoft Dynamics 365 for Employer Management is designed to define critical data, providing users with a centralized point of reference for efficient management of service requests, production activities, and overall operations.



- Learner registration

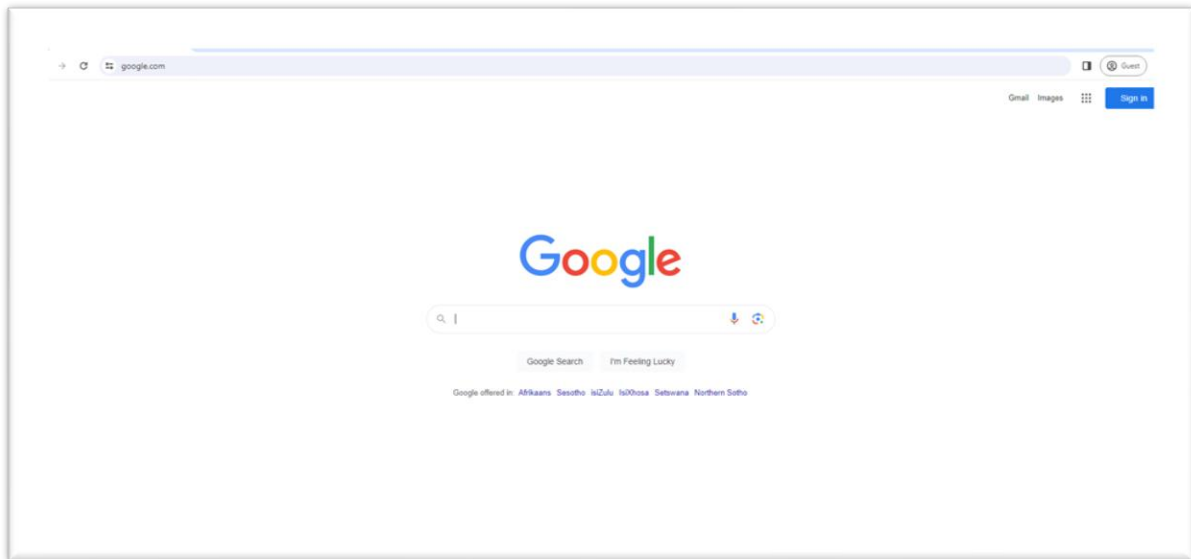


- Learner replacement

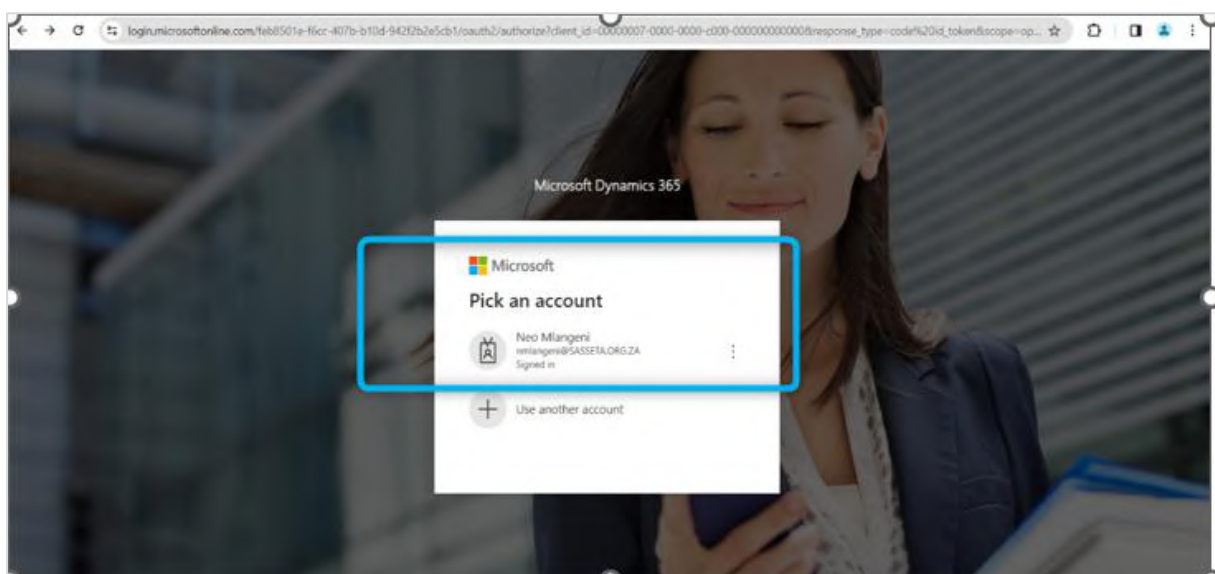


- Learner Termination

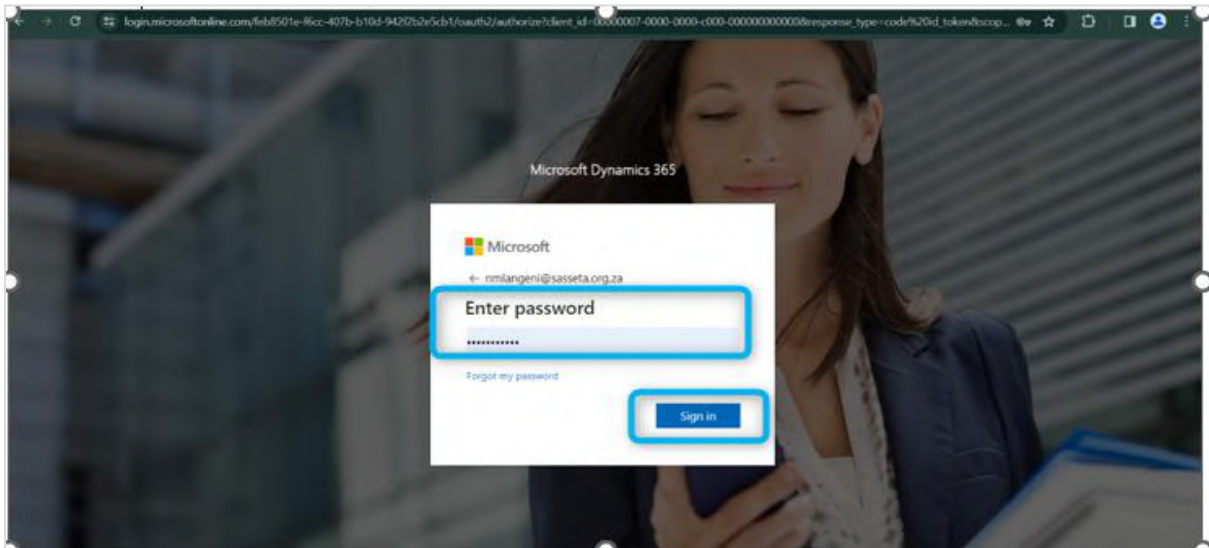
2 HOW TO LOGIN INTO THE IMIS



Step	Action
1.	<p>Launch the internal system:</p> <ul style="list-style-type: none">• Open any browser of your choosing.• Insert the following URL into your browser: https://sasseta-imis-aut.crm4.dynamics.com/• Click enter.



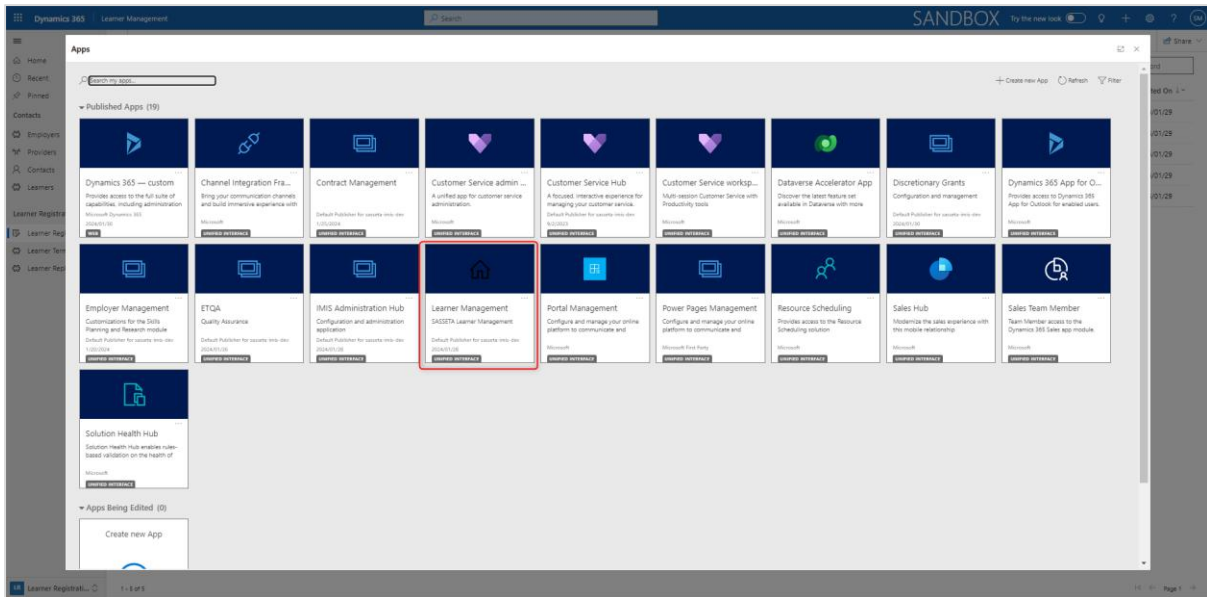
Step	Action
2.	<p>You will be prompted to sign in with your SASSETA account.</p> <ul style="list-style-type: none"> • Click the e-mail textbox. • Type in your valid e-mail address • Press enter



Step	Action
3.	<ul style="list-style-type: none"> • Click the Password textbox. • Type in your password • Click the Sign in button

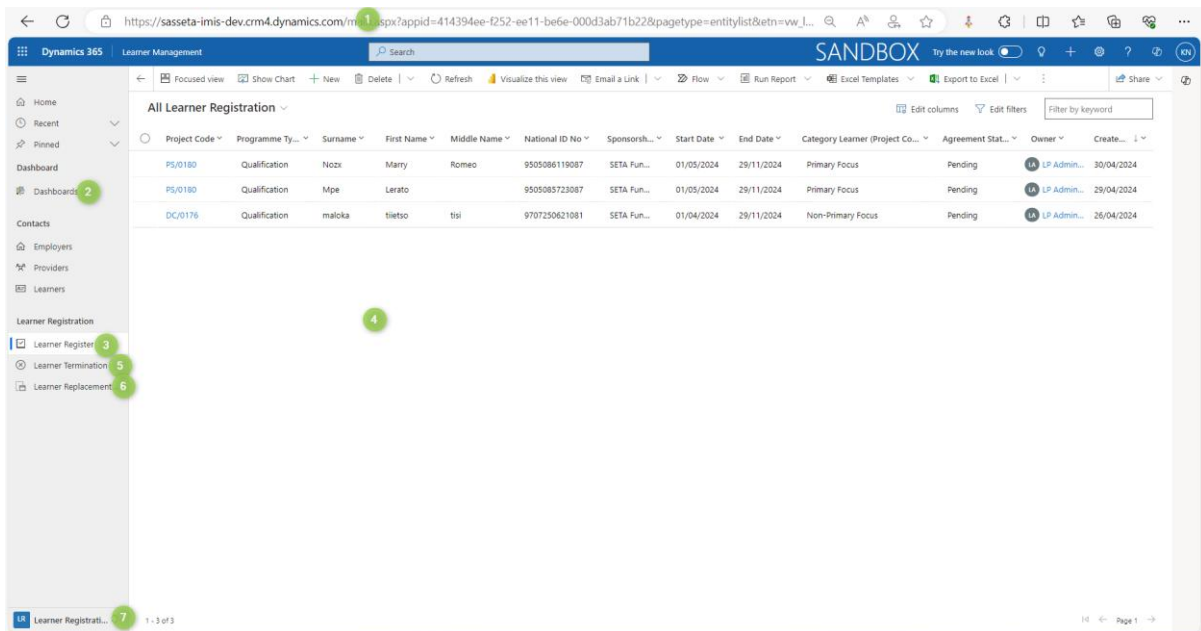
3 LEARNER MANAGEMENT APP

Apps provide a collection of functionalities for accomplishing a specific class of activity, such as managing your accounts and contacts. Click Employer management App.



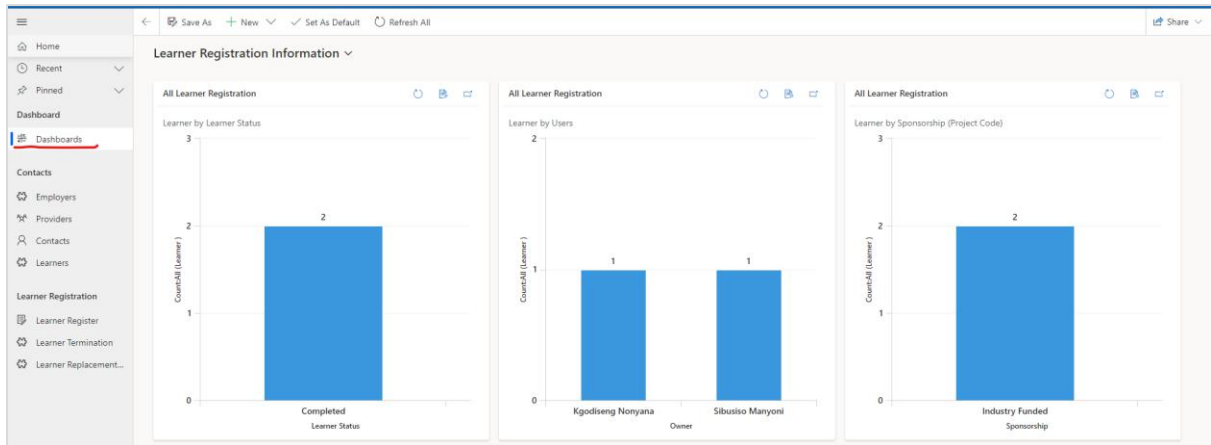
Step	Action
4.	<p>Application Is Running: Note that the respective application icon appears in the browser tab if the application is running.</p> <ul style="list-style-type: none"> • Click the Learner Management app. • The Learner Management form will be opened.

4 NAVIGATION



1. Site URL.
2. Dashboard
3. Learner register records
4. Working area (for Learner Register)
5. Learner Termination records
6. Learner replacement records
7. Navigation to Programme application

4.1 DASHBOARD



4.2 LEARNER REGISTER

The screenshot shows the 'Learner Register' view in Dynamics 365. The table displays the following data:

Project Code	Category	Learner (Project C...)	Programme Type (Project C...)	Programme Start date (Project ...)	Programme End date (Project ...)	Learner Sta...	Final Learner Appro...
Industry Funded	Funded	Non-Primary Focus	Qualification	2024/02/01	2025/11/30	Completed	No
SETA Funded	Funded	Non-Primary Focus	Qualification	2024/02/01	2025/11/30	Completed	No

- Consist of 5 views
 - Seta Funded Learners
 - Industry Funded Learner
 - All Learner Registration
 - Report View

5 LEARNER REGISTRATION FOR SETA FUNDED



- **Step 1** Learning programme: Verification
- **Step 2** Learner registration: Registration
- **Step 3** Learning programme: Validation

5.1 LEARNER REGISTRATION

5.1.1 THE LEARNER IS CAPTURED BY THE PROVIDER FROM THE WEB PORTAL.

Reference	Learner	Sponsorship (Project C...)	Category Learner (Project C...)	Programme Type (Project C...)	Programme Start date (Project ...)	Programme End date (Project ...)	Learner S...	Final Learner Appro...	Owner	Create...
Dineo Nonyana	SETA Funded	Primary Focus	Qualification	2024/02/01	2025/12/31	Submitted	No	LR Administrator	2024/01/30	

- Learners captured from the portal are automatically recorded on IMIS on the Learner Register. The system will record the created date and the status is submitted.

5.1.2 HOW TO CAPTURE LEARNER MANUALLY

Project Co...	Programme Typ...	Surname	First Na...	Middle Na...	National ID ...	Sponsorship (Project C...	Start date (Project C...	End date (Project C...	Category Learner (Project C...	Qualification (Project C...	Learnership Title (Project C...	Skills Programme (P
P50180	Qualification	kg			9505085723030	SETA Funded	5/1/2024	11/29/2024	Primary Focus	Access control officer		
IND-0182	Qualification	Zuma	Sibusiso			Industry Funded	3/13/2024	3/19/2024		Further Education and Training		
IND-0181	Unit Standards	Pieter	Yvonne			Industry Funded	7/1/2024	11/29/2024	Primary Focus	National Certificate Family Liv		
IND-0175	Qualification	Zuma	Sibusiso		9701018002083	Industry Funded	3/22/2024	3/23/2025		National Certificate Dog Hand		
P50180	Qualification	Nonyana	Tumi	Memmy	9505085723087	SETA Funded	5/1/2024	11/29/2024	Primary Focus	Access control officer		
IND-0177	Unit Standards	Nom	Kgodi	Romeo	9505085723044	Industry Funded	3/20/2024	3/29/2024				
IND-0177	Unit Standards	Nonyana	Kgodi	Romeo	9505085723082	Industry Funded	3/20/2024	3/29/2024				
IND-0177	Unit Standards	Nonyana	Kgodiseng	Romeo	9505085723087	Industry Funded	3/20/2024	3/29/2024				
IND-0175	Qualification	test	itzy			Industry Funded	3/22/2024	3/23/2025		National Certificate Dog Hand		
IND-0175	Qualification	retesting	itzy			Industry Funded	3/22/2024	3/23/2025		National Certificate Dog Hand		
LC0179	Unit Standards	Nonyana	Percy	Kabeo	9505085723087	SETA Funded	3/22/2024	4/5/2024	Primary Focus	Advanced Certificate Mission - EMERGENCY MEDICINE (PRAME		

1. Click on **Learner register** tab from the left navigation.
2. Click on **New** button.

The L

New Learner Registration

Review (-1 Min)

Registration

Learner Details | Qualification | Unit Standards | Learner Termination | Learner Replacement Requests

Programme details

Project Code --- 3

Learner --- 4

Learner Personal Information 5

Title ---

First Name ---

Middle Name ---

Surname ---

Type of ID ---

National ID No ---

Alternative ID ---

📅 Date of Birth ---

📅 Age ---

📅 Age Demographic ---

📅 Gender ---

Equity ---

Citizen Residence Status ---

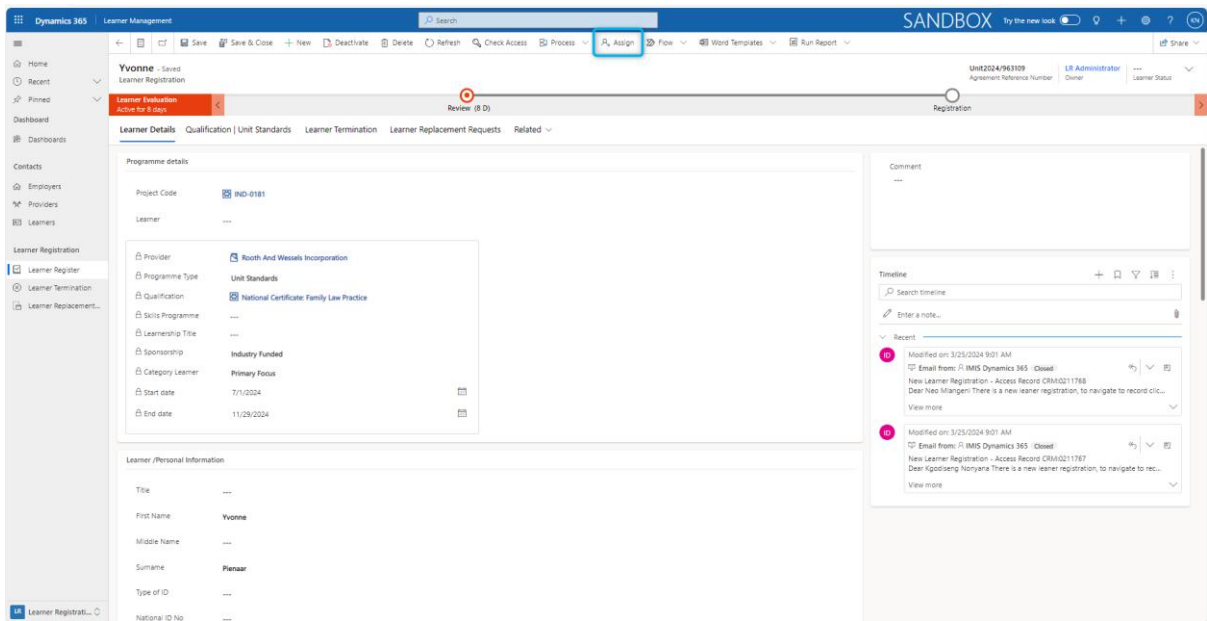
Comment ---

Timeline

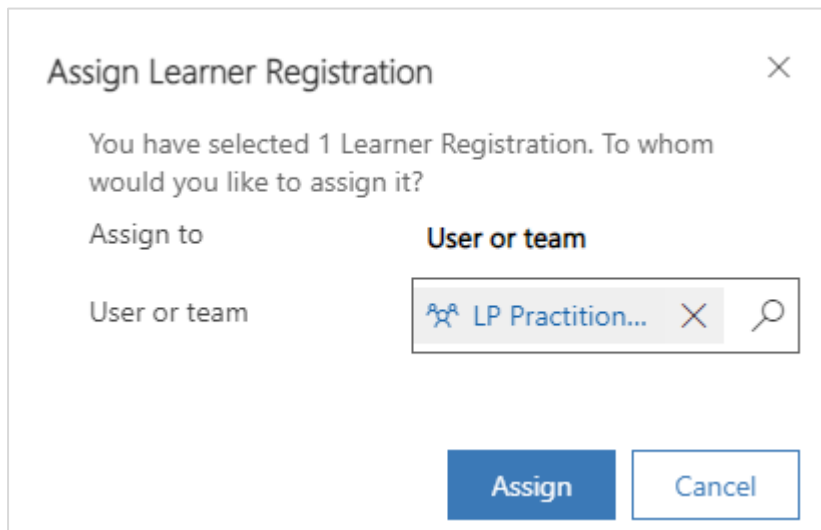
Almost there

Select Save to see your timeline.

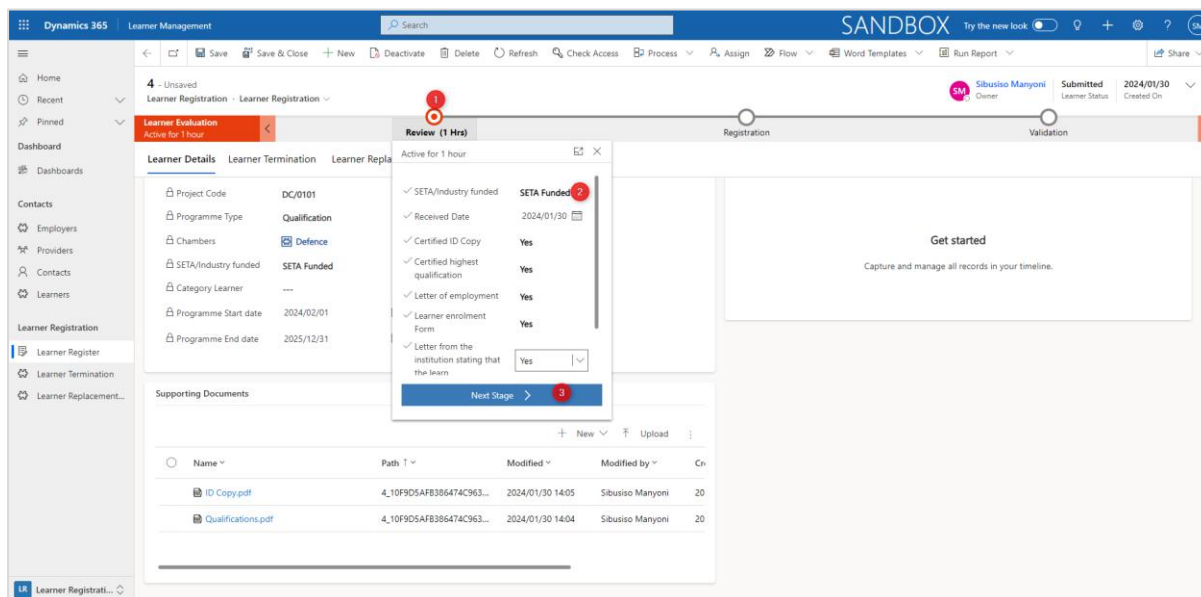
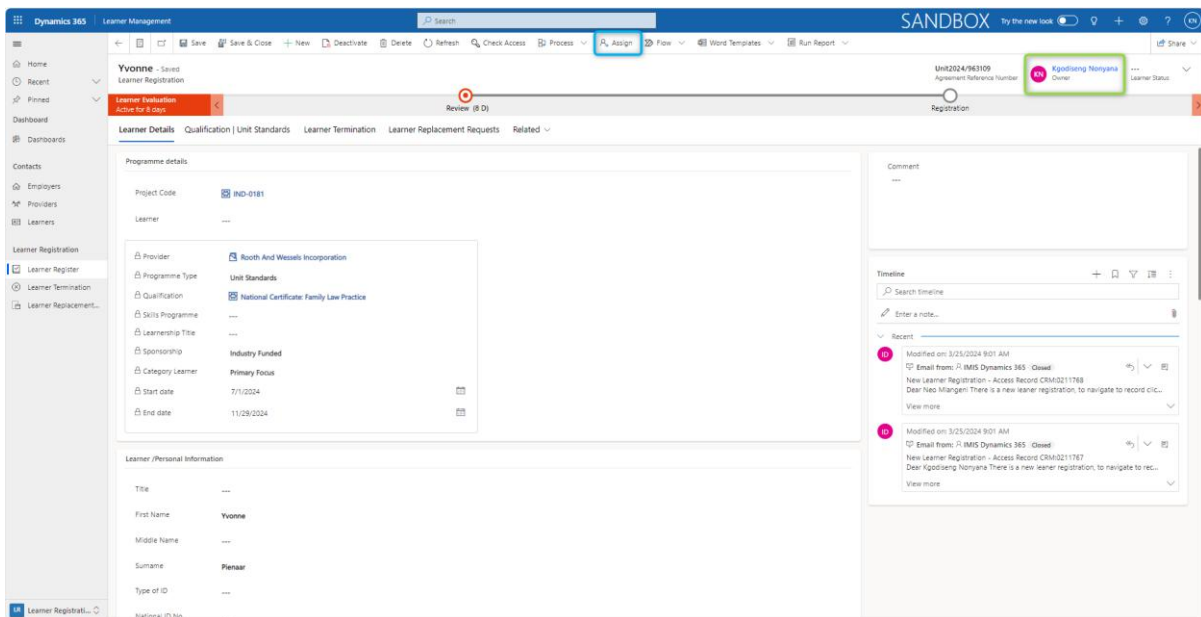
3. Select the project you want to register the learner under from the Project Code.
4. The learner field will be automatically populated once the LR Administrator registers the learner.
5. Populate Learner Personal Information, Learner Contact Details, and Learner General Details.



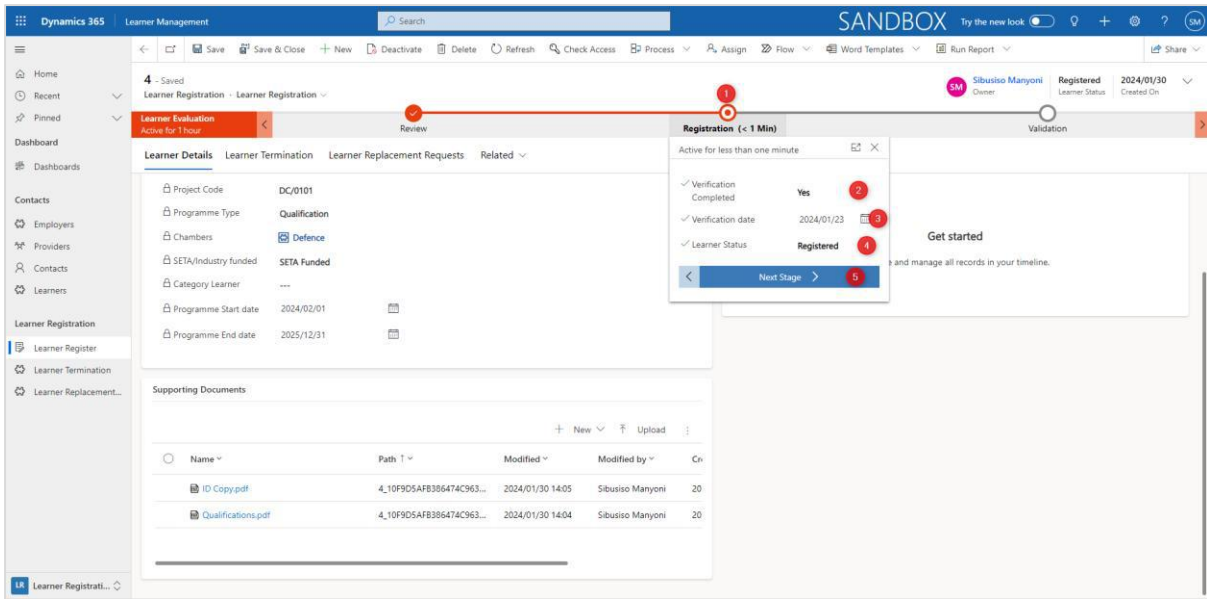
- The summary of the programme details will be displayed.
- Click on the **Assign** button.



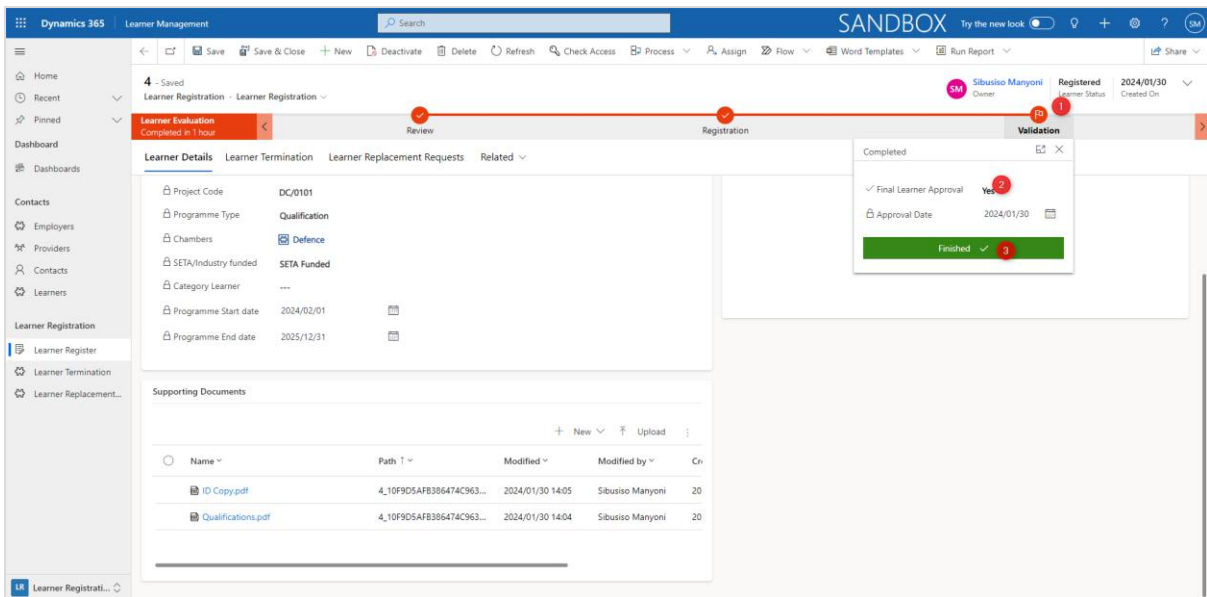
1. Under **“Assign to”** choose to assign to Me
2. The Learner registration record will be assigned to me.



3. Select **Review** from the step.
4. Complete the checklist.
5. Click on the **Next Stage** to move.
6. Click on **Assign** button, then assign the task to LR team or LR user.

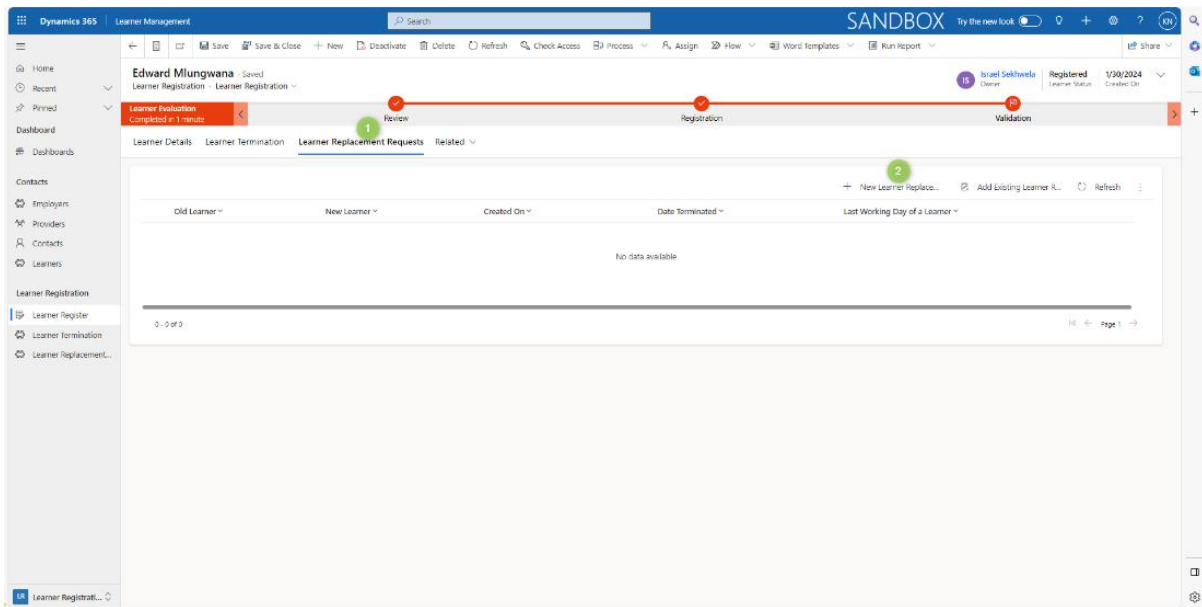


7. The assigned user “LR administrator” will complete registration stage.
8. Update the status of the of a learner to “Registered”.
9. Assign a record to LP practitioner for final verification.

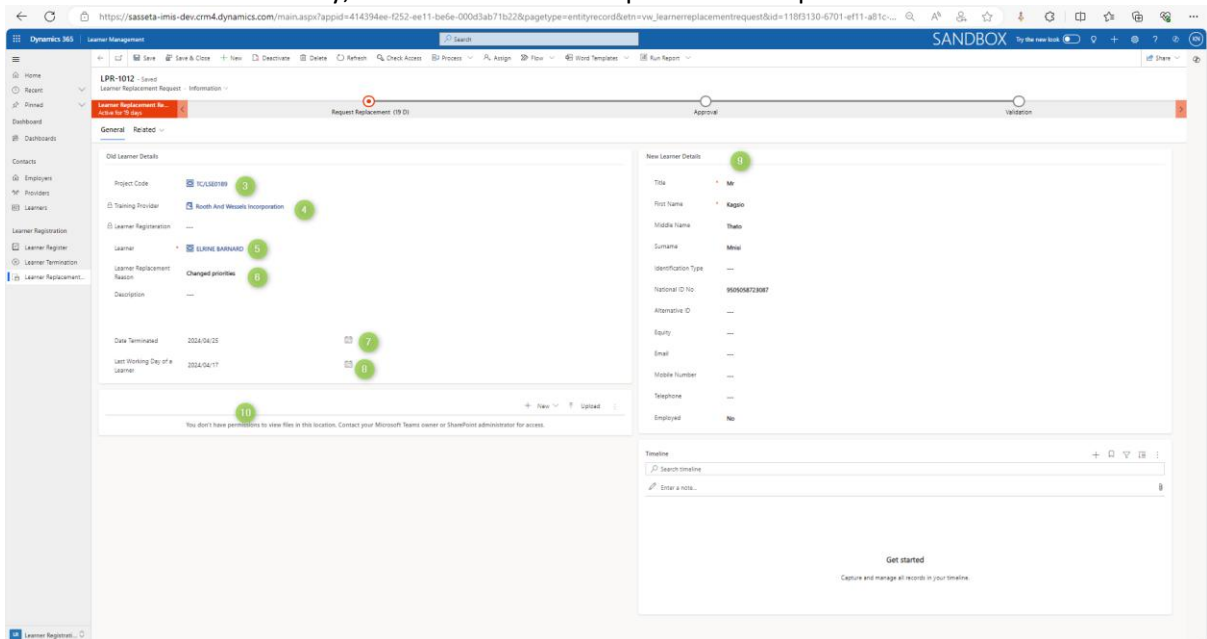


10. The LP practitioner will review the registered learner for final verification. The update the Final Learner Approval to Yes

5.2 LEARNER REPLACEMENT

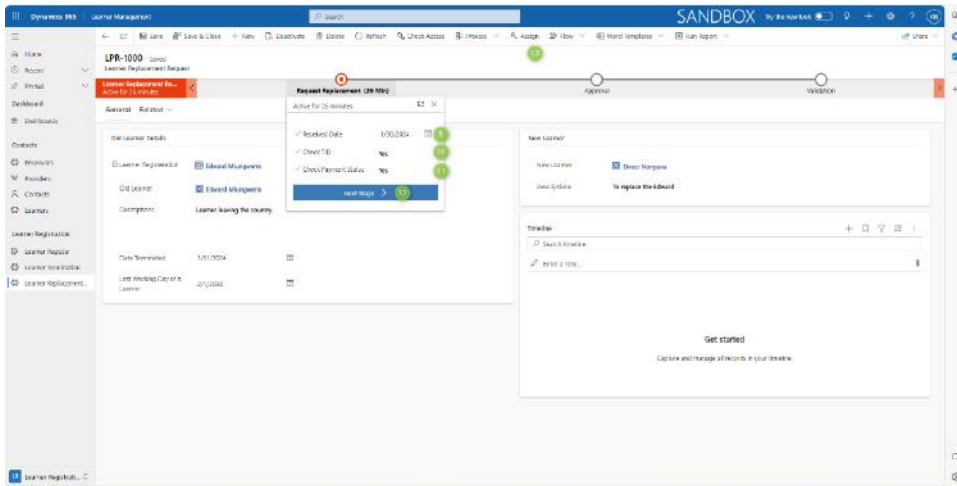


1. Learner Replacement Requests is captured by the Provider from the web portal.
2. If initiated internally, Select New Learner Replacement Requests.

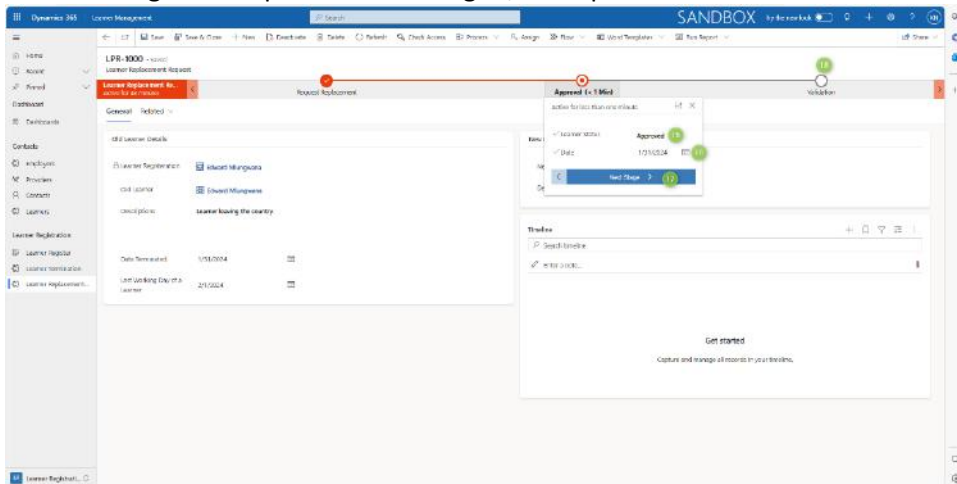


The received request will have the “NEW “learner and the “OLD “learner being replaced.

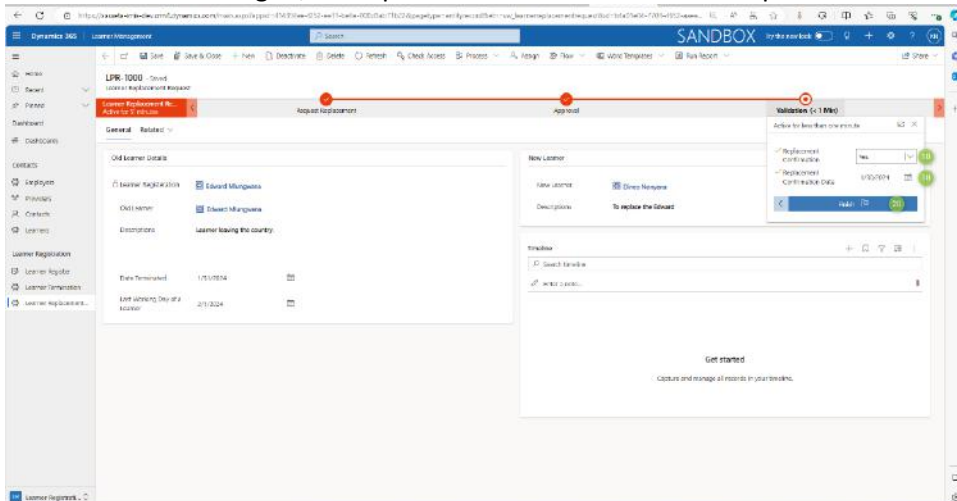
3. Select the Project the learner you want to replace is current under.
4. Select the provider for the learner you want to replace, currently listed under.
5. Select the reason for replacing the learner.
6. If the replacement reason is not available in the drop-down field, please enter the reason in the Description field.
7. Pick the Date Terminated of the old learner contract.
8. Pick Last working Day of a learner.
9. Enter the new learner information. The new learner will replace the old one in the project.
10. Add the supporting documents for the learner replacement.



11. LP/LR Administrator will review the request.
12. Enter the date they started working on the request.
13. If SETA Funded check the TID checklist.
14. LP/LR Administrator verifying if they checked the Payment Status.
15. Move the Business Process flow to the next stage.
16. Assign the request to LP Manager / LR Supervisor.



17. The LP Manager / LR Supervisor will review and approve the request
18. Enter the date they started working on the request.
19. The LP Manager / LR Supervisor will move the business process flow to the final stage

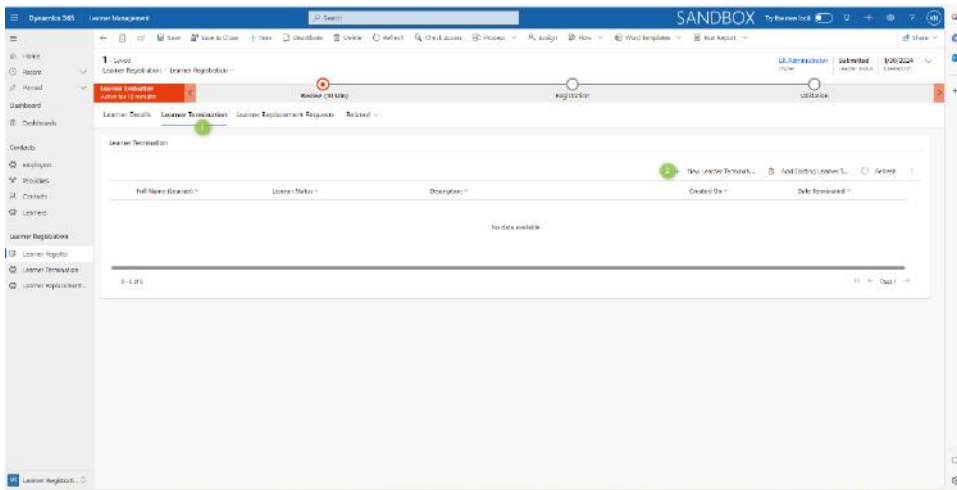


18. The LP Manager / LR Supervisor will confirm the replacement

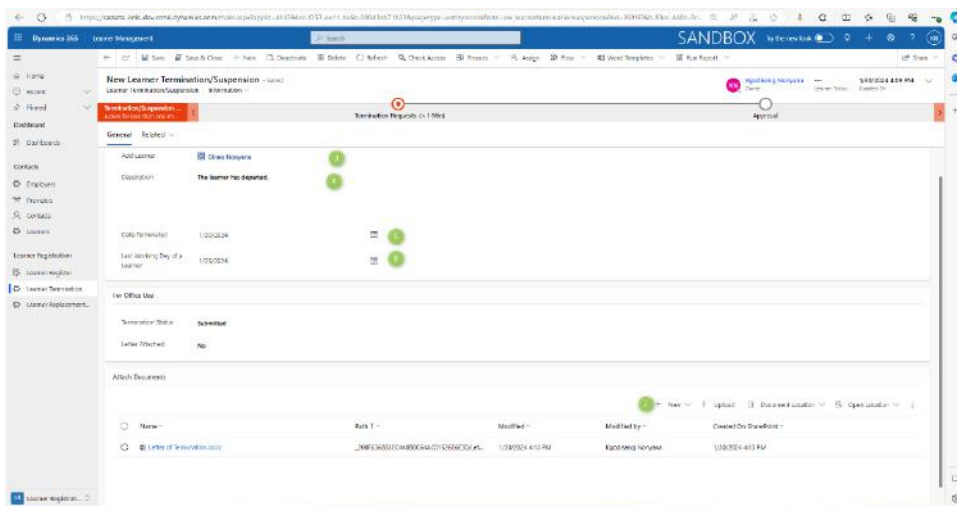
19. Enter the date they confirmed the request.

20. Complete the Business Process Flow (This will conclude the old learner and initiate the creation of a new learner under the learner registration).

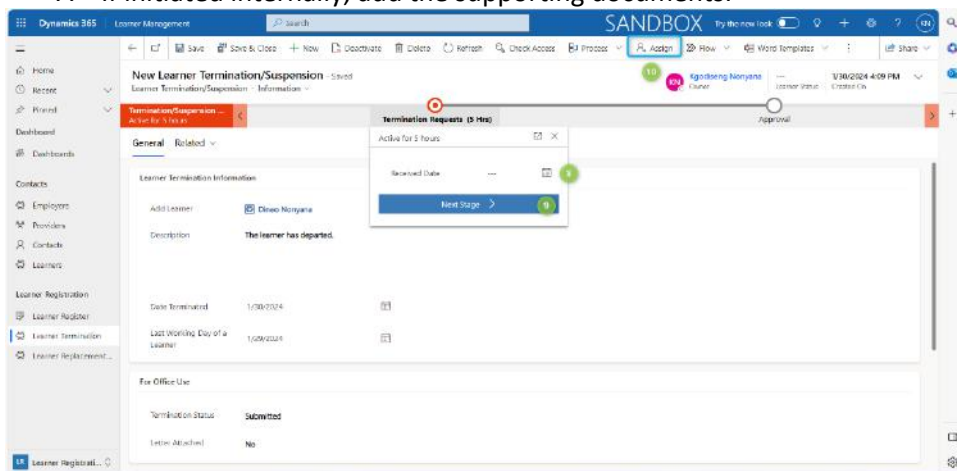
5.3 LEARNER TERMINATION



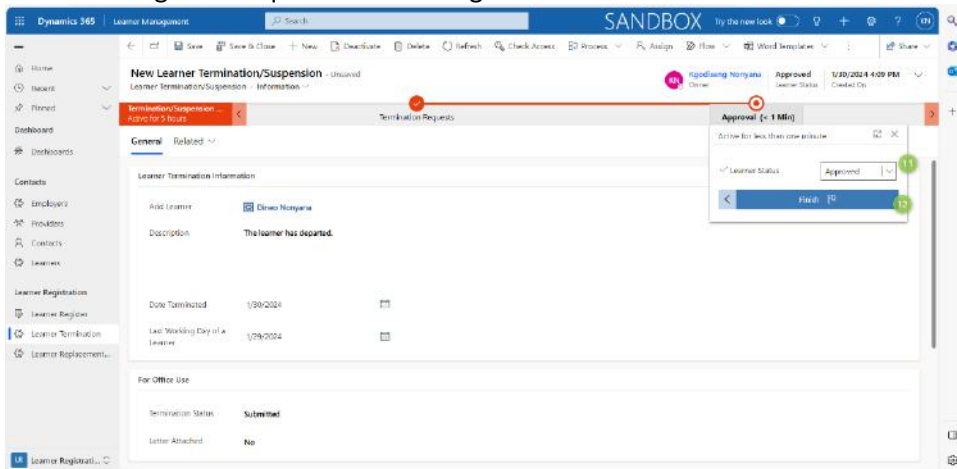
1. Learner Termination is captured by the Provider from the web portal.
2. If initiated internally, Select New Learner Termination.



3. Select the learner you want to terminate.
4. Enter the Description (Reason why the learning is being terminated).
5. Pick the Date Terminated for the learner.
6. Pick Last working Day of a learner.
7. If initiated internally, add the supporting documents.



8. Enter the date they started working on the request.
9. Move the Business Process flow to the next stage.
10. Assign the request to LP Manager.



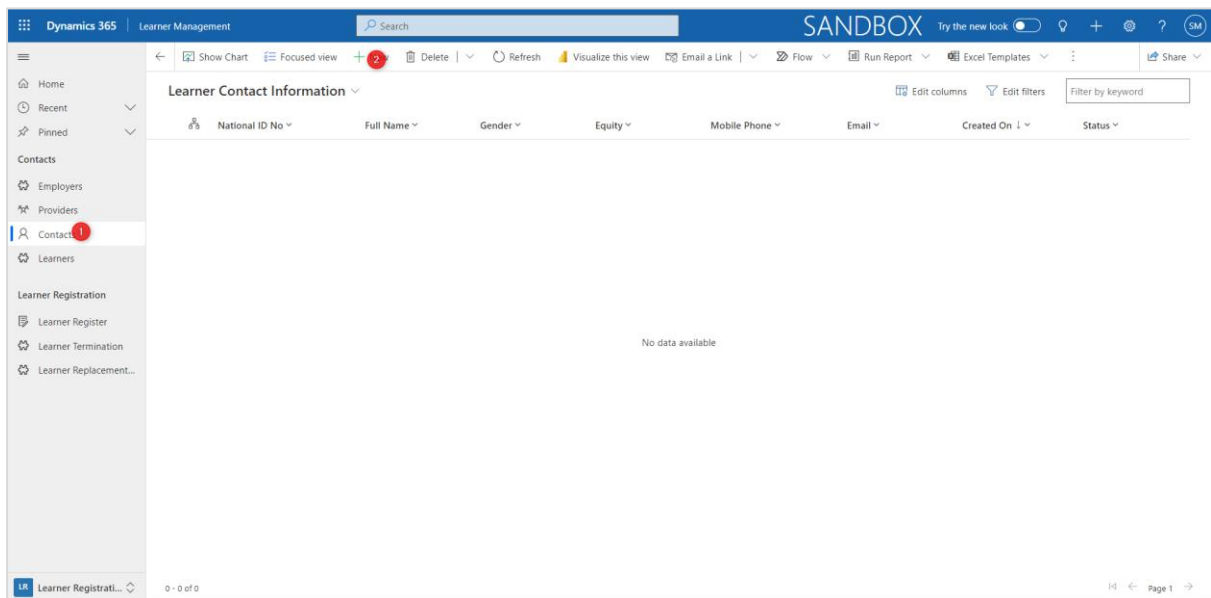
11. LP Manager needs to approve the request
12. Finish the Business Process Flow to update the main record status in learner registration.

6 LEARNER REGISTRATION FOR INDUSTRY FUNDED

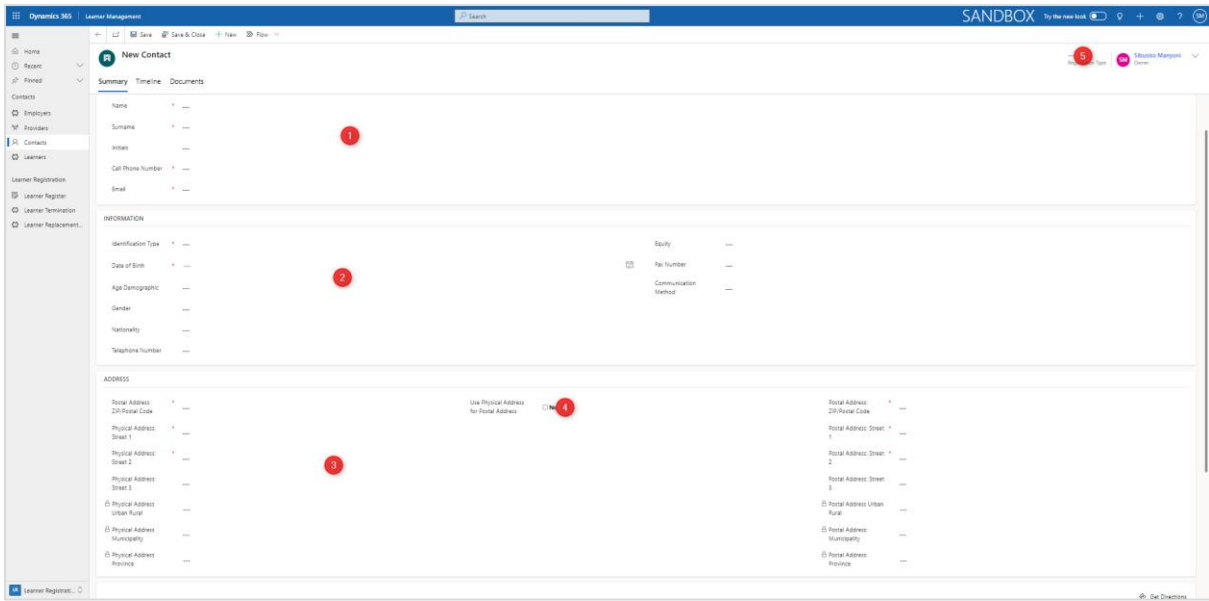


- **Step 1** Learner registration: Registration

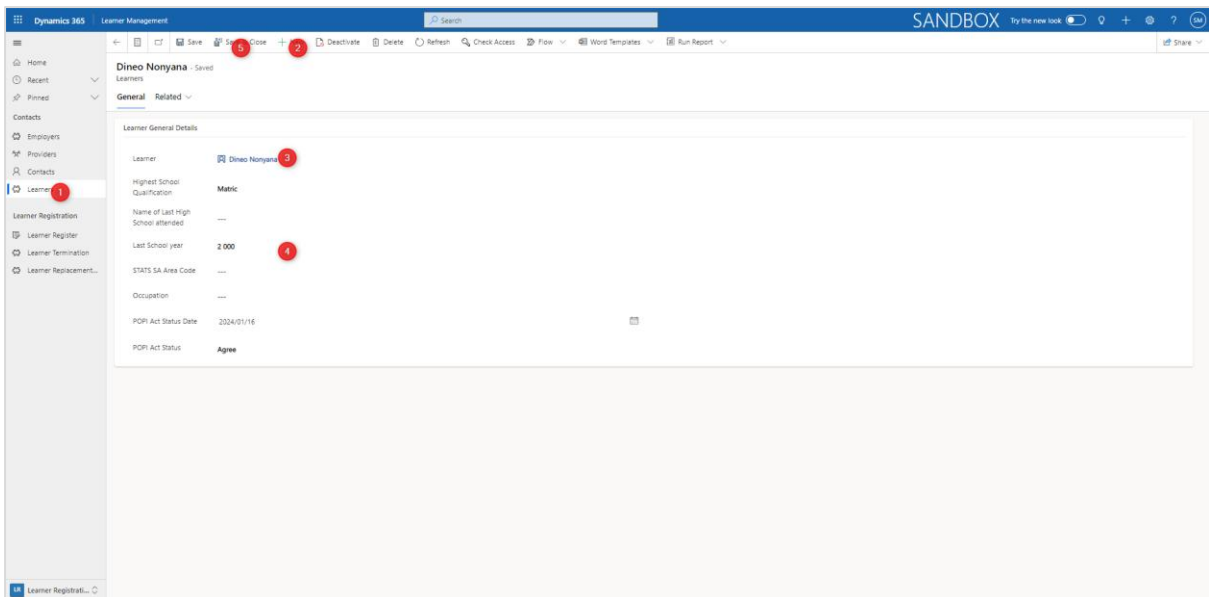
6.1 CAPTURE LEARNERS



1. Click contacts.
2. Click on the new button.



1. Fill in all 3 sections.
2. If the physical address is the same as postal, set the “Use Physical Address for Postal Address” to Yes
3. Save and closed



4. Click on Learner
5. Click on the NEW button

Dineo Nonyana - Unsaved
Learners

General Related ▾

Learner General Details

Learner	Dineo Nonyana
Highest School Qualification	Matric
Name of Last High School attended	Phulong Secondary School
Last School year	2 000
STATS SA Area Code	Phugeni SP
Occupation	---
POPI Act Status Date	2024/01/16
POPI Act Status	Agree

6. Click learner dropdown and select the learner you added under contact list
7. Fill in the form.

6.2 LEARNER REGISTRATION AGAINST A PROGRAMME

The screenshot shows the Dynamics 365 Contract Management interface for a project named 'Project Test 4'. The interface is divided into several sections:

- Project Information:**
 - Project Number: PRD-1087
 - Project Code: IND-0100
 - Project Name: Project Test 4
 - Description: Project Test 4
 - Project Status: Active
 - Sponsorship: Industry Funded
 - Definite/Not Definite: Definite
 - No of Milestones: ---
- Contract Details:**
 - Contract: ---
 - Programme Type: Qualification
 - Qualification: Advanced Diploma: Diploma
 - Category Learner: Non-Primary For
 - Contract Type: Non-Pivotal
 - Chambers: Legal
 - Confirmation of Employment letter: Yes
- Estimates:**
 - Start Date: ---
 - Finish Date: ---
 - Estimated Total Cost: ---
 - No of learners: ---
 - Per Learner Cost: ---
 - Actual Total Cost: ---
 - Invoice: ---
- Actuals:**
 - Programme Start date: 2024/01/16
 - Programme End date: 2025/11/20
 - Actual Number of learners: ---
- Stakeholders:**
 - Employer: NKANGALA TVET COLLEGE WATERVAL BOVEN BRANCH
 - Contact Person: ---
 - Provider: NKANGALA TVET COLLEGE WATERVAL BOVEN BRANCH
 - CFO: ---
- Timeline:**
 - Search Timeline: [Input field]
 - Enter a note... [Text area]
 - Get started: Capture and manage all records in your timeline.

In this example, we have a provide you has an intent to train learner.

- The programme is for industry funded learners.
- **Project code:** ind-0100,

- **Qualification:** Advanced Diploma: Diplomacy.
- **Employer name:** Nkangala Tvet College Waterval Boven Branch
- **Provider:** Nkangala Tvet College Waterval Boven Branch

National ID No. (Learner)	Name	Highest School Qualification	Last School EMS	Created On
9209146144082	Dineo Nonyane	Matric	Phulung Secondary School	2024/01/29 09:13
5209165993086	Jacques Nel	University	Beed	2024/01/29 11:37
730321004089	Charotte Jense Van Rensburg	University	1001 Hills College	2024/01/29 11:39
631219562008	Edward Mlunguzi	University	Aaliance Early Childhood Development Centre	2024/01/29 11:40
8210305947084	Shemiso Ntuli	Matric	Ovo Combined	2024/01/29 11:44

1. Learners - list of learner

New Learner Registration
Learner Registration - Learner Registration

Learner Evaluation
Active for less than one mi... | Review (< 1 Min) | Registration

Learner Details | Learner Termination | Learner Replacement Requests

Programme Details

Learner: + ... 3

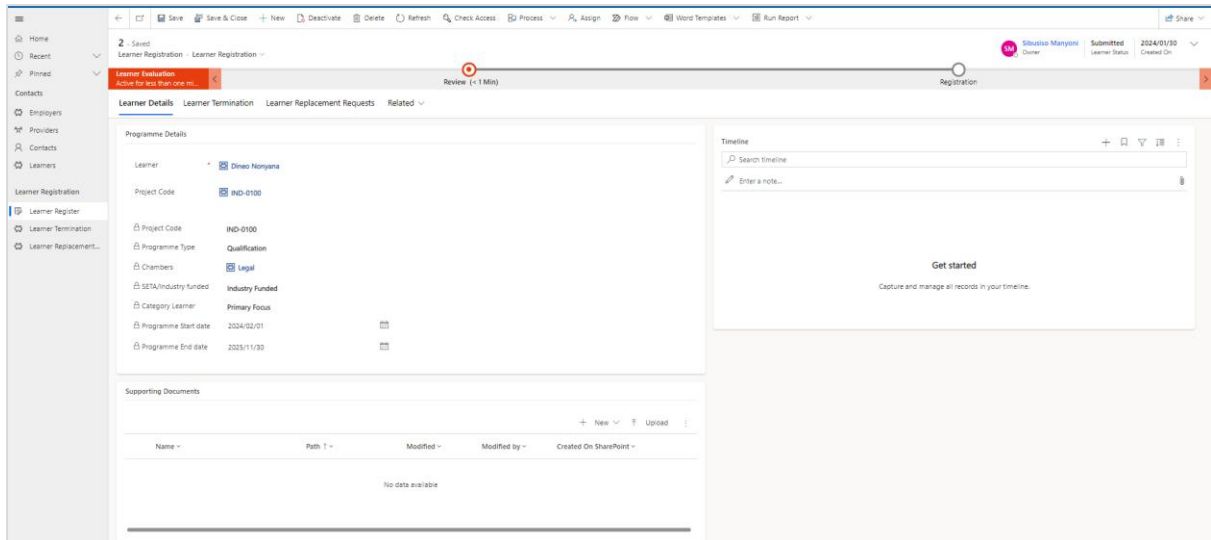
Project Code: Look for Proje [2]

Supporting Documents

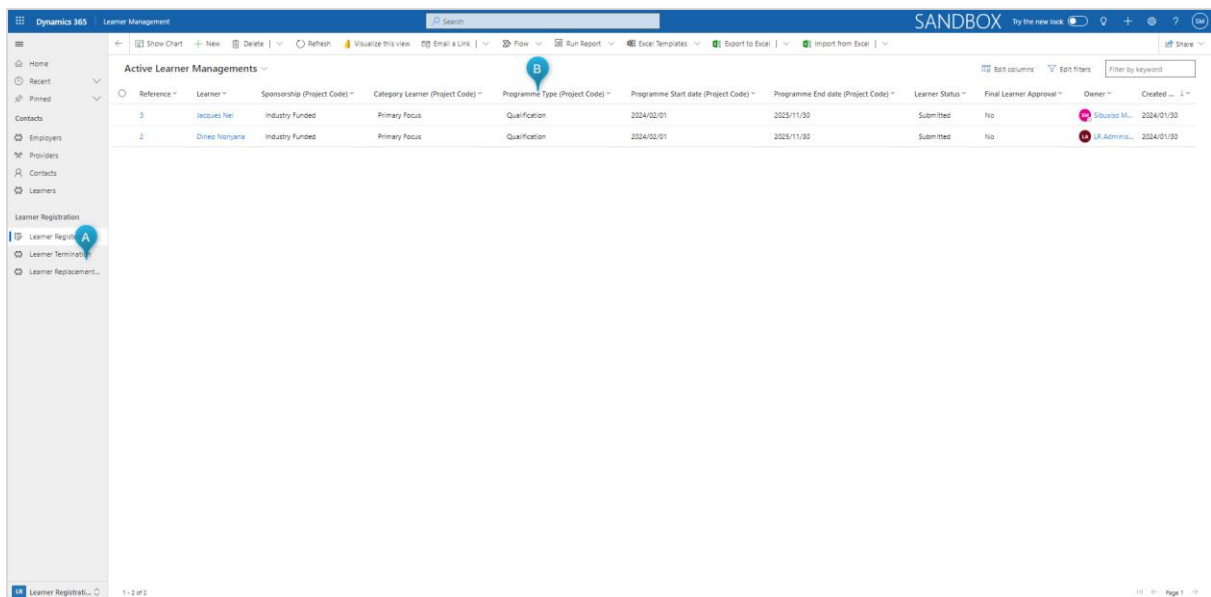
Timeline

Almost there
Select Save to see your timeline.

1. Click on the Learner Registration
2. Click on the project code from the search button.
3. Select the project code of industry funded.
4. Search for the learner name and select.
5. Add attachments

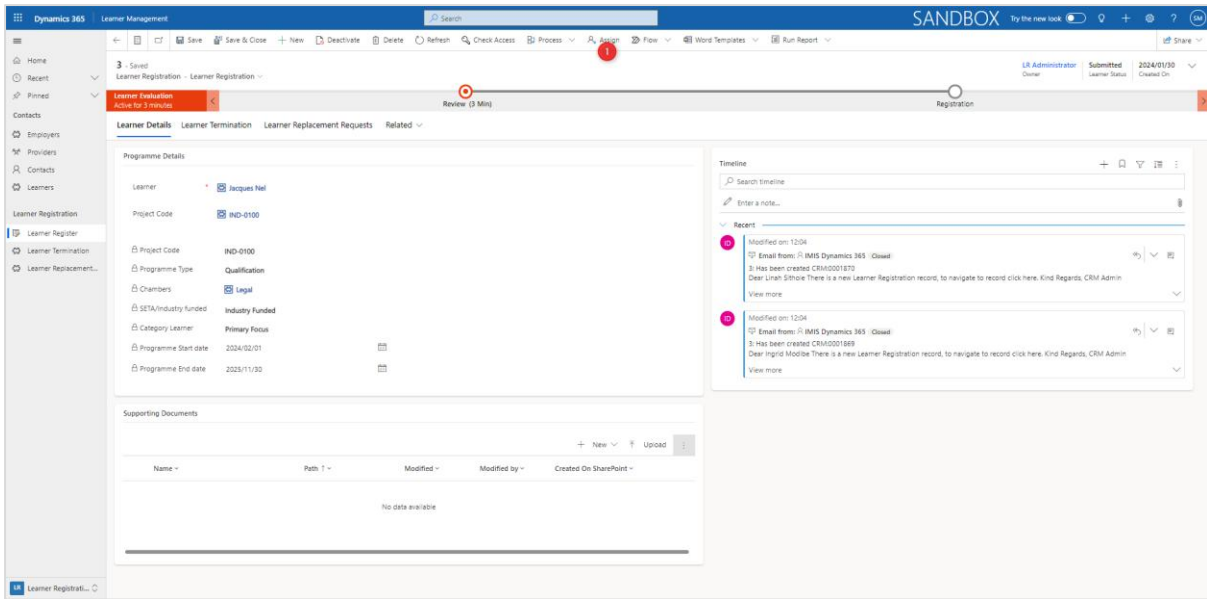


6. Click on save and closed.

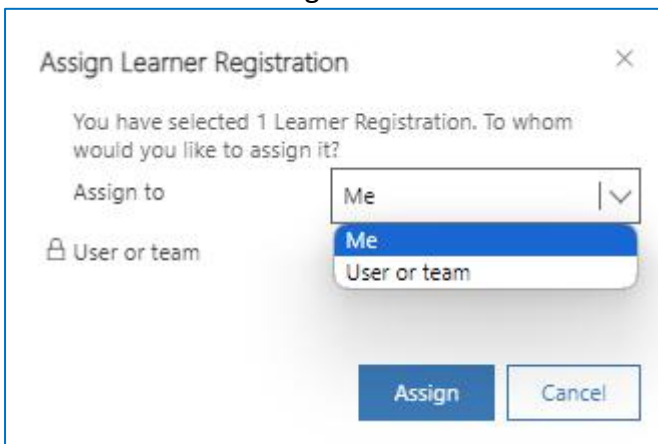


The learner registration will have the add learner record.

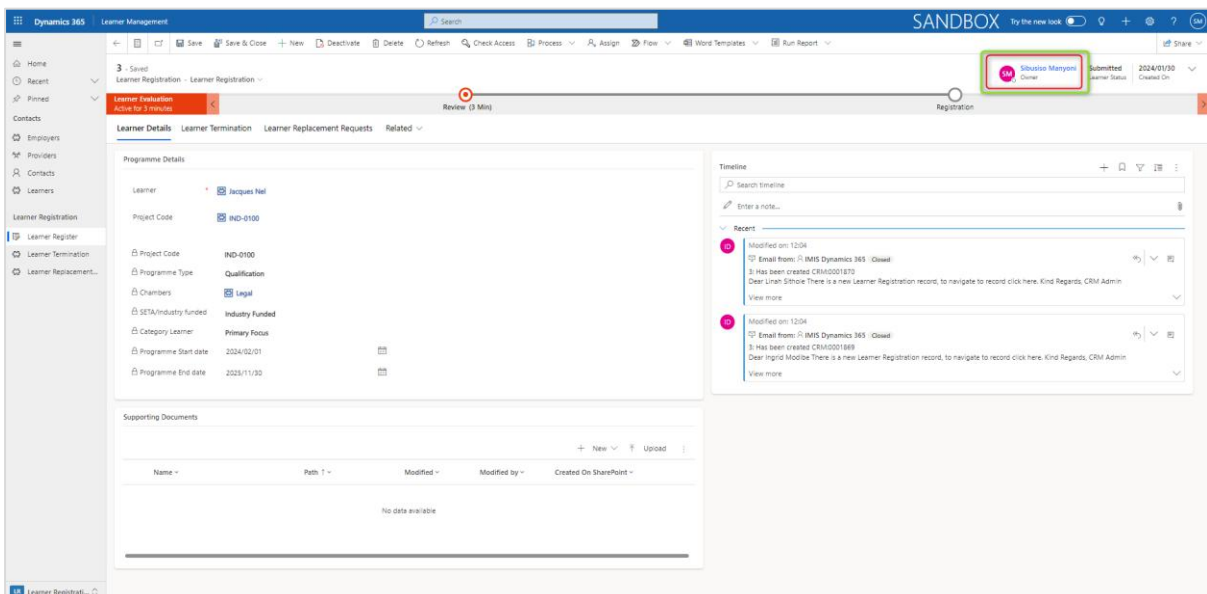
6.2.1 OPEN A LEARNER RECORD



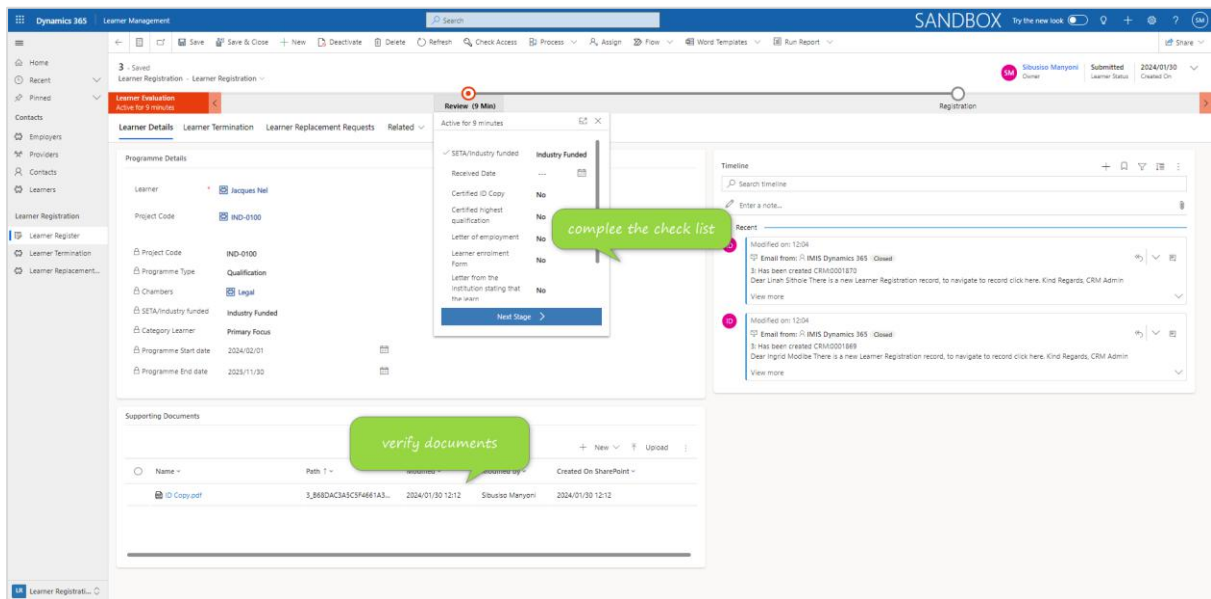
7. Click on the assign button.



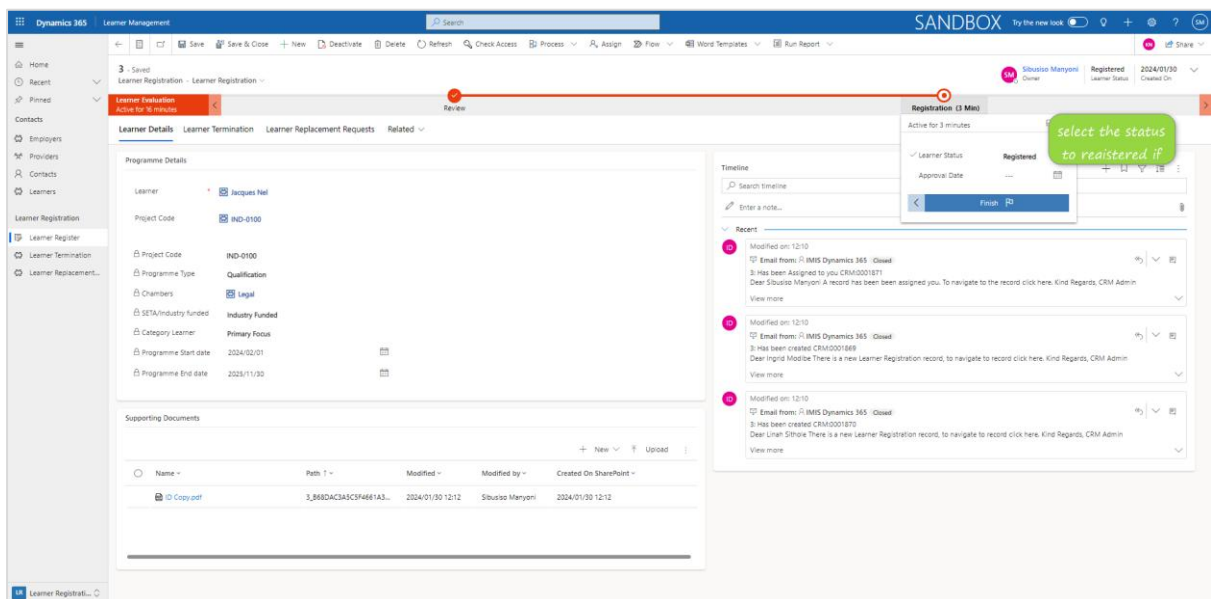
8. Select me, if you want to assign the record to yourselves or user or team to assign it to under user.



Notice the record is now assigned to a user. By default, the record is allocated to LR Administrator team.



9. Check the attached documents.
10. Select stage 1 review and complete the checklist.
11. Click next stage.



12. Click on the stage registration.
13. Select save and closed.

6.2.2 TO QUERY INFORMATION

6.2.3 NON-PRIMARY FOCUS

- These are quality assured by other SETA's.
- The learners are not certified under SASSETA.
- The learner will be captured into the SASSETA IMIS system and data captures must be able to change the status to completed on receipt of SOR or Certificate from other SETA's.

Must be able to report on learners' completion status, provided they have been reported as entered before (need not be in the same financial year).

Referen...	Learner	Sponsorship (Project C...	Category Learner (Project C...	Programme Type (Project C...	Programme Start date (Project ...	Programme End date (Project ...	Learner Sta...	Final Learner Appro...	Owner	Create...
3	Jacques Nel	Industry Funded	Non-Primary Focus	Qualification	2024/02/01	2025/11/30	Completed	No	sibusiso...	2024/01/30
2	Dineo Nonyana	Industry Funded	Non-Primary Focus	Qualification	2024/02/01	2025/11/30	Completed	No	sibusiso...	2024/01/30

ETQA start here and update the learner status to completed.