

# User Manual - Learnerships

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# What is a Learnership?

A learnership is a structured learning process for gaining theoretical knowledge and practical skills in the workplace leading to a qualification registered on the National Qualifications Framework (NQF). Learners participating in a learnership have to attend classes at a college or training centre to complete classroom-based learning, and they also have to complete on-the-job training in a workplace under the guidance of a mentor. The workplace experience must be relevant to the qualification.

Learnerships are directly related to an occupation or field of work, for example, electrical engineering, hairdressing or project management.

During the learnership, learners will be required to complete assignments, tasks and practical tests and projects. They will be formally assessed in the classroom and a Portfolio of Evidence will be mentored in the workplace. A learner's progress will also be moderated internally and/or externally by a moderator.

If all these assignments are completed successfully, they will be awarded an NQF-registered qualification, that is recognised nationally. They will receive a certificate stating the qualification and the area of skill development.

Learnerships are managed by Sector Education and Training Authorities (SETAs). They were introduced by government to help skill learners and to prepare them for the workplace.

A learnership requires that a learner enter into a fixed term employment contract with the company whilst studying towards a qualification registered on the National Qualifications Framework (NQF), which is in line with the learnership (the cost of the qualification falls to the Company). Once the qualification is completed, the learnership will also end.

## How do learnerships work?

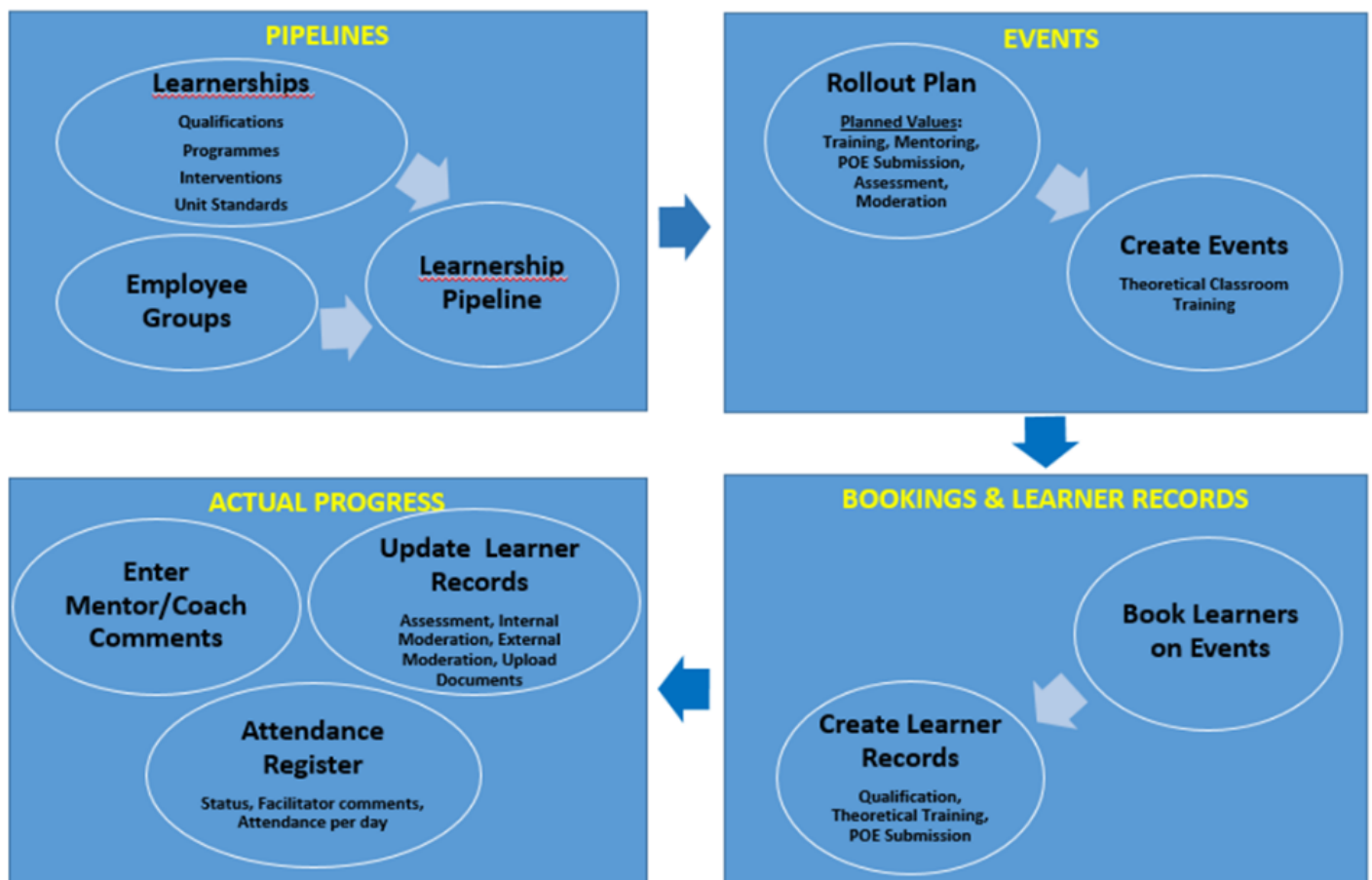
A Learnership consists of Unit Standards, Training Interventions, Programmes and a Qualification.

- **Unit Standards:** A collection of knowledge, skills and attributes in which a candidate must prove competence (in a structured assessment) to acquire **credits** on the NQF.
- **Training Interventions:** Specific goals or activities to be performed by the learner during the training process e.g. Theoretical Classroom Training and provide a Portfolio of Evidence Document.
- **Programmes:** A grouping of unit standards will form a occupationally based learning programme.
- **Qualification:** A group of programmes and unit standards that have been clustered together to make up a registered qualification. There are 3 types of qualifications on the NQF: certificates (120cr), diplomas (240cr) and degree (360cr). The number of credits needed to graduate varies from learnership to learnership.



# Working with the Learnership Module

## Steps in the Learnership Process



### Steps in the Learnership Process

The following detail steps illustrate the typical Learnership process in the Signify System. A Learning Administrator will have access to perform the following actions:

1. Master data is created for the Learnership linked to a qualification, programmes, interventions and unit standards.
2. Facilitators, assessors, moderators, mentors and coaches are defined in the master data catalogue.
3. A learner group is created.
4. Create a pipeline by linking the learner group to a Learnership.

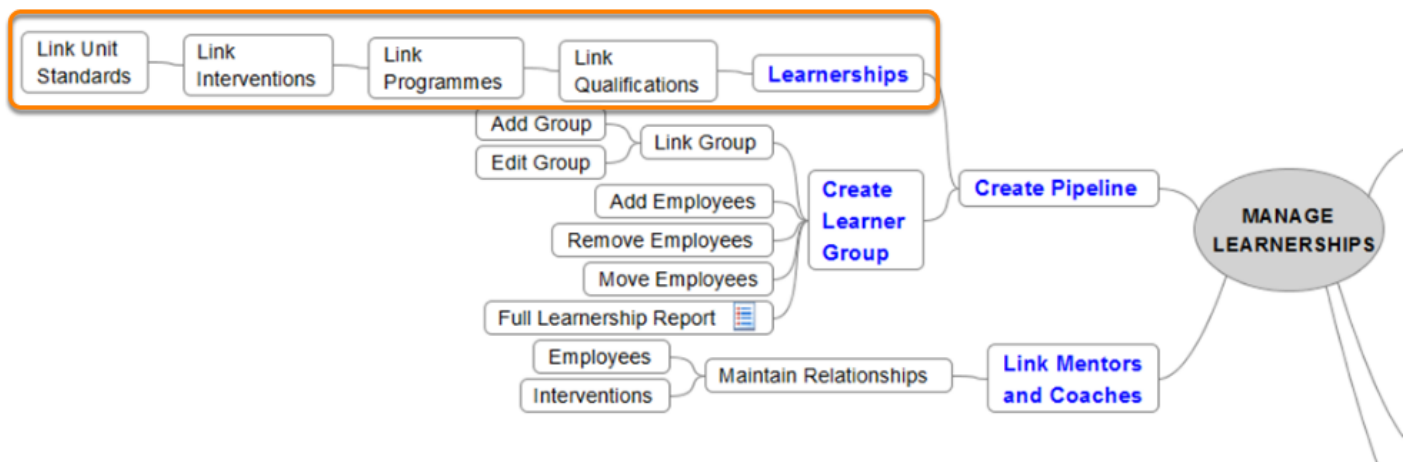
5. A planned schedule with training dates for all programmes on the Learnership. (Rollout Plan) is created manually. All the learners registered for the Learnership can now receive a Learnership Rollout Plan.
6. An automated procedure creates a relationship link between the Line Manager and Employee's POE training interventions. The Learning Administrator can also manually link mentors/coaches to the employee's training interventions.
7. Training events for all the programmes are created for the Learnership using a bulk procedure.
8. All the learners on the Learnership pipeline are booked on events, by using a bulk procedure.
9. Learner records for all the employees on the pipeline are created, by using a bulk procedure.
10. The learner do formal theoretical classroom training on programmes by completing the unit standards defined in the Learnership Programmes.
11. An attendance register is maintained per day. A paper attendance register has to be sent to the Training Department before 10:00 on the day of the event to allow phoning absent attendees. The facilitator or Learning Administrator can enter progress and comments on the learner's classroom training progress.
12. After the learner has completed the formal theoretical training and is find to be competent, the learner will start with the following activities in the listed order: workplace mentoring, POE submission, assessing the POE, internal moderation and external moderation. (Only a sample of learners will be selected for external moderation).
13. Update the actual progress on the learner records for the above mentioned activities.
  - More than one actual can be captured per activity.
  - Capturing of workplace mentoring comments can be done by Mentors, Coaches or Learning Administrator.
  - Capturing of POE submission, assessing the POE, internal moderation and external moderation information.
14. The Academy do the application for certificate or diploma from SETA. After the learner successfully completed all the programmes/unit standards on the Learnership. The pipeline status can be set to "Pending Certificate" by the Learning Administrator.
15. After the certificate was received the pipeline status can be set to "Completed".
16. Learners receive the qualification.
17. Close the Learnership group by changing the Active Indicator = "No".

# How to Create a Learnership using Master Data

In this section you will learn how to create a Learnership by using the following steps:

- Create Unit standards
- Create Training Interventions and link Unit Standards
- Create Programmes and link Training Interventions
- Create Qualification and link Programmes
- Create a Learnership and link Qualification

## Learnership Master Data Mind Map



## How to Work with Unit Standards

How to Work with Unit Standards

**HOW DID I GET HERE?**

System Administration | System Administration | Database | Standards

## Unit Standard List Screen



## Unit Standards List

List of unit standards as well as site-specific standards which can be linked to a programme (skills or other) or to jobs and positions

Search

Short Code

Title

Standard / Site Specific

Schema

Search

Clear

Add

Delete

Action	Short Code	Title	Registration Number	DoL Approved	Unit / Site Standard	NQF Level	Schema	Delete
<a href="#">View/Edit</a>	U113965	113965 Demonstrate and apply knowledge of role and responsibility of national government in South Africa	113965	Yes	Legislative	NQF level 04	All	<a href="#">Used By</a>
<a href="#">View/Edit</a>	U115593	115593 Apply facilitation processes to deal with an environmental risk in a local community	115593	No	Legislative	NQF level 02	All	<a href="#">Used By</a>

The **Unit Standard List Screen** shows a list of Unit Standards.

- Add, Edit and Delete functionality exists in order to maintain Unit Standards.
- The System Administrator is responsible to maintain the Unit Standards catalogue.

# Unit Standard Details Screen

## Unit Standard Details Screen

Note on the following when adding or editing the Unit Standards:

- The accuracy of the **credits** field is important, because this field will be used to calculate the total credits (to be earned/completed) for programmes and learnerships.
- Training Intervention Sync Mode should be "Do not create/update learner record"

# How to Work with Training Interventions

## How to Work with Training Interventions

### HOW DID I GET HERE?

# Training Intervention List Screen



## Training Intervention List

Search

Description  Type

☐ Show Disabled Training Intervention

Previous 20 || Next 20

Code	Description	Type	Learning Type	Nature of Learning	Category	Status
58206 LITERACY	58206 LITERACY TRAINING	Classroom	Classroom	Internal	A	
58206 NUMERACY	58206 NUMERACY TRAINING	Classroom	Classroom	Internal	A	
L58206P1	L58206/WRO/L2 - LEARNING PROGRAMME 1 POE	Portfolio of Evidence	Practical	Internal	A	
L58206P2	L58206/WRO/L2 - LEARNING PROGRAMME 2 POE	Portfolio of Evidence	Practical	Internal	A	

Training interventions will represent any activities for which events or learner records should be created e.g. formal theoretical training session and POE submission. A descriptive naming convention should be followed for example “WRMO/L2/58206 - LEARNING 1 Theoretical Training” or “WRMO/L2/58206 - LEARNING 1 POE”.

The **Training Intervention List Screen** shows a list of Training Interventions.

- Add and Edit functionality exists in order to maintain the Training Interventions.
- The System Administrator is responsible to manage and maintain the Training Intervention catalogue.

# Training Intervention Detail Screen

## Training Intervention Detail Screen

Note on the following when adding or editing the Training Interventions:

- All the mandatory fields are marked with an asterisk(\*)
- It is important to note that the Pathway Step Type field on the intervention have to be defined as “Classroom” for all the Theoretical Training Interventions. The classroom interventions will be used in the "Create Events" procedure, later in the learnership management process.



- The intervention credits field will only be used in reporting by the Learnership Module, only the unit standard credits will be used in credits calculations.
- Tick the Mentor Manual Update check box for training interventions that should not be included in the automated procedure to assign the Line Manager as a Mentor on the Training Interventions. (A classroom intervention will be marked, because it will not be mentored by the Line Manager)
- Check the "Add to Learner Record" check box.

## Link Unit Standards to Training Interventions



Image not found or type unknown

Link the predefined unit standards to the training interventions using the “Link Unit Standards” tab.

## How to Work with Programmes

How to Work with Programmes

**HOW DID I GET HERE?**

System Administration | System Administration | Database | Programmes

## Programmes List Screen



## Programmes List

Combine or group a number of training interventions or unit standards into a training programme.  
Depending on a company's requirements a programme could be loaded as a learner record for an employee.  
When and how a programme is loaded requires an ad hoc configuration done by Signify.

Search

Code 58206

Title

Search

Clear

Add

Delete

Action	Code	Title	DoL Approved	FAIS Relevant	NQF Band	Delete
<a href="#">View / Edit</a>	58206LIT	58206 LITERACY	No	No		<a href="#">Used By</a>
<a href="#">View / Edit</a>	58206NUM	58206 NUMERACY	No	No		<a href="#">Used By</a>
<a href="#">View / Edit</a>	L58206/WRO/L2/L1	L58206/WRO/L2/Learning Programme 1	No	No		<a href="#">Used By</a>
<a href="#">View / Edit</a>	L58206/WRO/L2/L2	L58206/WRO/L2/Learning Programme 2	No	No		<a href="#">Used By</a>
<a href="#">View / Edit</a>	L58206/WRO/L2/L3	L58206/WRO/L2/Learning Programme 3	No	No		<a href="#">Used By</a>

The **Programmes List Screen** shows a list of Programmes which consists of a number of Training Interventions.

- Add, Edit and Delete functionality exists in order to maintain the Programmes.
- The System Administrator is responsible to manage and maintain the Training Programmes catalogue.

## Programme Detail Screen

Image not found or type unknown



## Link Training Interventions to Programmes



## Training linked to L58206/WRO/L2/Learning Programme 1

From the training intervention library, select the training interventions that should form part of the L58206/WRO/L2/Learning Programme 1 programme.

[Programmes List](#) > [Ref: 25] L58206/WRO/L2/L1 L58206/WRO/L2/Learning Programme 1

[Detail](#) [Link Training](#) [Link Unit Standards](#)

Search  [Search](#) [Clear](#)

[Add](#) [Delete](#) [Back To List](#)

Training Intervention		Delete
L58206/WRO/L2 - LEARNING PROGRAMME 1 POE		<input type="checkbox"/>
L58206/WRO/L2 - LEARNING PROGRAMME 1 TRAINING		<input type="checkbox"/>

Link the predefined Training Interventions to the Programmes using the “Link Training” tab.

# How to Work with Qualifications

How to Work with Qualifications

## HOW DID I GET HERE?

System Administration | System Administration | Database | Qualifications

## Qualifications List Screen



### Qualifications List

Combine or group a number of training interventions or unit standards into a qualification. Depending on a company's requirements a qualification could be loaded as a learner record for an employee. When and how a qualification is loaded requires an ad hoc configuration done by Signify.

Search

Qualification Type  Title

[Search](#) [Clear](#)

[Add](#) [Delete](#)

Action	Code	Qualification Title	SAQA Approved	NQF Level	Provider	Notes	Delete
<a href="#">View / Edit</a>	58206	National Certificate: Wholesale and Retail Operations [SGB R&W] [58206]	No	NQF level 02	SGB R&W		<input type="checkbox"/>

The **Qualifications List Screen** shows a list of Qualifications.

- Add, Edit and Delete functionality exists in order to maintain the Qualifications.
- The System Administrator is responsible to manage and maintain the Qualifications catalogue.

# Qualifications Detail Screen

## Qualifications Detail Screen

The important fields to be entered on the Qualification screen are shown above.

Note: Skills Programme Synchronisation Mode should be set to "Automatically update the status of an existing learner record if all conditions are met".

# Link Programmes to Qualifications

## Link Programmes to Qualifications

Link the predefined Programmes to the Qualification by using the "Link Programmes" tab.

# How to Link a Qualification to a Learnership

## How to Link a Qualification to a Learnership

### HOW DID I GET HERE?

System Administration | System Administration | Database | Learnerships

# Learnerships List Screen

## Learnerships List Screen

The Learnerships **List Screen** shows a list of Learnerships.

- Add, Edit and Delete functionality exists in order to maintain the Learnerships catalogue.
- The System Administrator is responsible to manage and maintain the Learnerships catalogue.

# Learnerships Detail Screen

## Learnerships Detail Screen

Enter the related fields and link an existing Qualification.

# What are the Steps in the Learnership Process

Continue with the following steps after the creation of all the learnership master data and catalogues. The detail description and function of the learnership management steps are as follows:

## **Create a Learner Group:**

A learner group is a group of learners that is going to be trained as a group.

## **Create a Learnership Pipeline:**

A learnership pipeline is defined by a learner group linked to a learnership for a specific time period.

## **STEP 1 (Planned Values):**

The manual capturing of planned values (rollout plan detail) for all the programmes on the learnership pipeline. This action can be done as soon as the planning information for the learnership and programmes are available.

## **STEP 2 (Create Events):**

The bulk creation and scheduling of all the "Theoretical Training" events for all the Programmes on the learnership pipeline. Events will be created for classroom type interventions only. It is important that the planned values (STEP 1) are entered first before events can be created because the planned start dates and planned end dates will be used to schedule the events.

This action can ideally be done a month before the course start date.

## **STEP 3 (Book learner group on events):**

After events have been created in Step 2, a group of learners can now be booked on the events. It is important that the events were created correctly before the bulk procedure is used to book all the learners on the learnership on events. An email can be sent out to the learners reminding them that they have been booked on a course.

This action can ideally be done a week before the course start date.

## **Enter Mentor/Coach Relationships:**

This action involves the creation of a list of employee's interventions that have to be mentored or coached by a specific mentor or coach. A pre-defined mentor will be linked to a learners' interventions. This action can be done any time after STEP 3.

#### **STEP 4 (Create Learner Records):**

After learners have been booked on the events, learner records will be created by means of a bulk procedure. Examples of learner records that will be created are:

- A qualification learner record.
- The learner's training interventions linked to the programmes for the learnership e.g. Theoretical Training, POE Submission.

The creation of learner records can be done directly after STEP 3.

#### **STEP 5 (Event Attendance Register):**

Update learner's attendance records on the day of the theoretical training session or soon thereafter. Attendance information that can be captured for the training intervention learner record are: competency and completion statuses, facilitator comments as well as attendance per day.

#### **Enter Mentor and Coach Comments:**

After the theoretical training session has been completed successfully by the learner, the mentor or coach can make multiple comments on a learner's progress during the workplace mentoring phase. Comments by mentors and coaches can be captured on a learner's training interventions.

This action can be done after the theoretical training activity has been completed successfully and the mentor and coach relationships have been created.

#### **STEP 6 (Update Employee learner records):**

In addition to the updating of attendance on learner records, additional comments can also be captured by assessors and moderators per learner record. Documents can also be uploaded on the learner records.

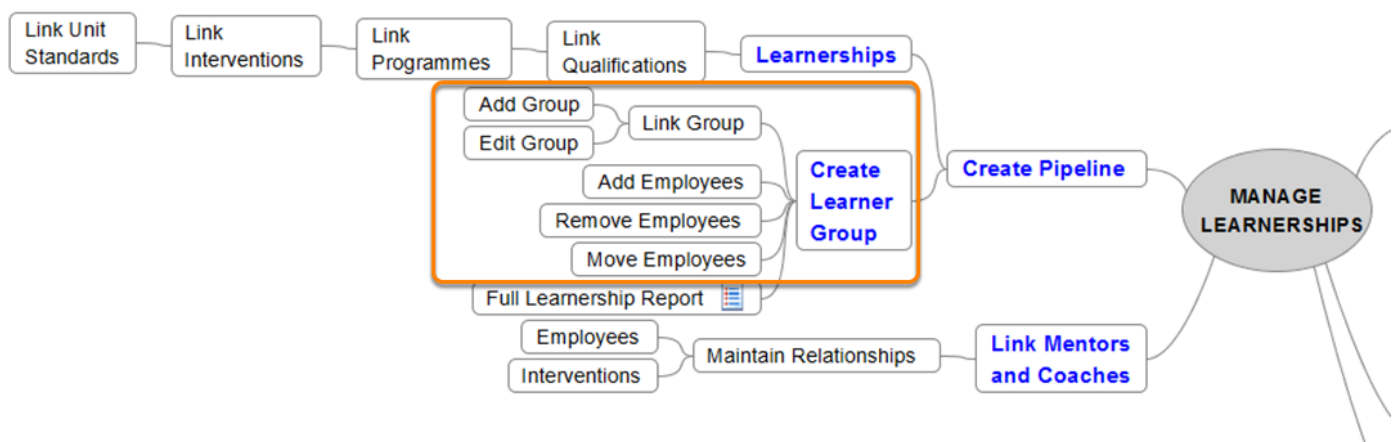
#### **STEP 7 (Programmes Actuals):**

The detail information on the actual progress for the Programmes per learner can be viewed at any time during the learner's training process.

# Working with a Learner Group

A Learner Group is a predefined group of learners to be scheduled and trained as a group on a Learnership. The criteria for grouping learners is the Learnership as well as the location where training will take place.

## Learner Group Mind Map



## How to Work with a Learner Group

How to Work with a Learner Group

**HOW DID I GET HERE?**

System Administration | Modules | eLearning | Learning Management | Learnership | Learner Groups

## Learner Group List Screen

Learner Group List Screen



- A learner group is defined by a descriptive name to be used when managing a group of learners that is going to be trained as a group.
- A list of existing learner groups will be displayed.
- Functionality to add a new group, edit an existing group and delete a group is available to maintain the Learner Groups.
- A group cannot be deleted when employees have been linked to the group. The linked employees should be deleted first, before a group can be deleted.
- Change the active indicator field = "No" to indicate that a learner group is no longer in use.
- The Link Employees functionality is used to add new employees to the group.
- The Learning Administrator is responsible for creating and maintaining the learner group catalogue.

# How to Link Learners to a Learner Group

Add, remove or move employees with regards to the current Learner Group

[Learner Groups](#) » [JHB/16/02](#) » [Employees](#)

Employee Number	Employee Name	Employment Type	Store name	Org Path	Position Title	Termination Date	Select
— C664	Annette Irwin	Temporary External	Checkers The Glen, Jhb	Assupol	Director		<input type="checkbox"/>
ID Number: 9412030000000 Contact Details: Line Manager: Pieter Botha Line Manager Contact Detail:							
+ 8299	Michelle Dalvie	Temporary External	Checkers The Glen, Jhb	Assupol	Junior Clerk	2016/07/12 Dismissed	<input type="checkbox"/>

Add Employees

Remove Employees

Move employees

Back

Back to Learner Group List

Full Learnership Report

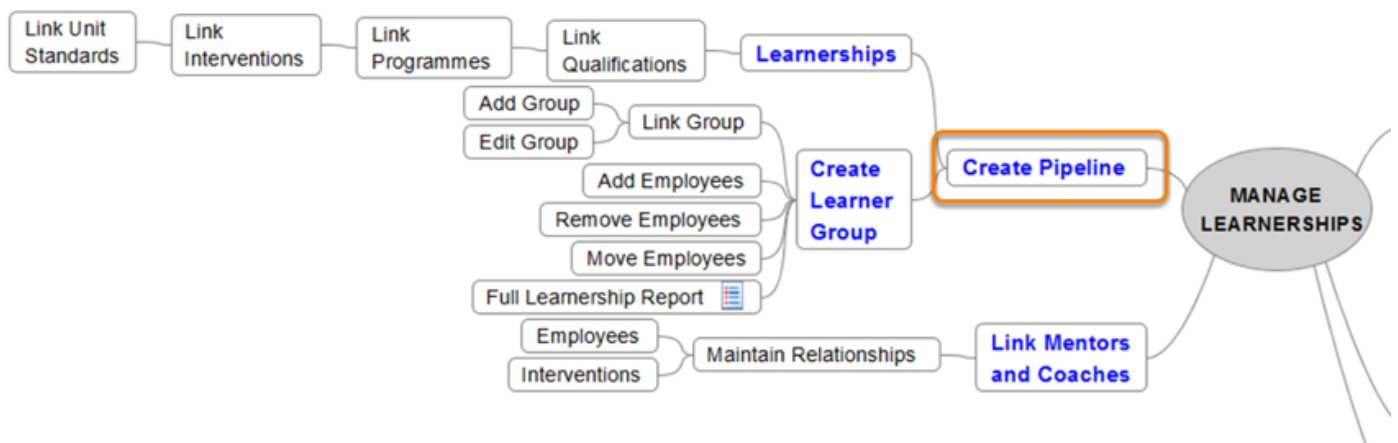
A list of learners is displayed when you click on the "Link Employees" link on the Action button on the Group List Screen.

- These learners will typically be from the same region and will do the same Learnership and will therefore be booked on events as a group.
- Add a new learner to the learner group: A selection screen will be displayed to filter and select employees to add to the group. Only employees linked to an organization structure can be added to the group. An employee can be linked to more than one group at a time.
- A learner can be removed from a group: All history data (event bookings, learner records etc.) will not be deleted. A manual action is necessary to delete the history where necessary.
- Move a learner to another group: New events, bookings and learner records will be created in the new group. Manually remove events, bookings and learner records from the old learner group if necessary. History of completed/attended events will not be deleted.
- A learner can be scheduled in more than one pipeline at the same time. There can be a potential double booking of learners on events that should be manually managed by the Learning Administrator.
- The Learning Administrator is responsible for creating and maintaining the learner group employee list.

# Working with a Learnership Pipeline

A Learnership Pipeline is a predefined group of learners to be scheduled and trained as a group on a Learnership for a specific pipeline period.

## Learnership Pipeline Mind Map



## How to Work with a Learnership Pipeline

[How to Work with a Learnership Pipeline](#)

**HOW DID I GET HERE?**

System Administration | Modules | eLearning | Learning Management | Learnership | Learner Groups

## Learnership Pipeline List Screen

[Learning](#)

Default Signify (Signify) ▾

(7)

+ Add Learnership Pipeline

jhb

Search Learnership

Search Status ▾

Select begin date

Search SETA Qualification

Select end date

Actions ▾	Group ▾	Learnership ▾	Begin Date ▾	End Date ▾	Status ▾	Region ▾	Number of Employees linked to group ▾	Number of Terminated Employees ▾	Retention Rate ▾
<div>+</div> <div> <div>Actions ▾</div> <div> <div>Edit</div> <div>Programmes</div> <div>Employees</div> </div> </div>	JHB/16/01	Further Education and Training Youth Development Level 4 SETA 48541	2016/06/01	2016/08/31	Not Started	Smollan JHB North Room 890	4	1	75.00
<div>+</div> <div> <div>Actions ▾</div> </div>	JHB/16/02	Wholesale & Retail Merchandising Operations Level 2 SETA 58206	2016/06/01	2016/08/31	Not Started	Smollan JHB South Room 334	5	2	60.00

Export to excel


- The “Learnership Pipeline Screen” is the starting point for the whole learnership management process.
- A list of all the learner groups linked to learnerships will be display on the Learnership Pipeline List Screen.
- The list can be filtered by: Group, Learnership, Qualification, Begin date, End Date, Status and Region.
- Functionality to Add and Edit of a Pipeline is available.
- Note that a pipeline cannot be deleted once it has been created. It can only be edited and the learners within the learner group, can still be changed. In the case of pipeline wrongfully created, change the status to ‘Cancelled’
- The System/Learnership Administrator is responsible for creating and maintaining the pipeline list.

## How to Add a Learnership Pipeline


Create a new Learnership Pipeline by filling in the form below.

Learnership Pipelines

Learner Group

 \*

Learnership

 \*

Status

\*

Learnership Region

\*

Begin Date

\*

End Date

\*

Save

Back

To add a new learnership pipeline, click on the **Add Learnership Pipeline** button on the Pipeline List screen.

The following information is available to be entered on the Add a Pipeline screen:

- Learner group drop down: list of all the active learner groups.
- Learnership drop down: list of all the registered learnerships.
- Status dropdown: list with hardcoded values: Not Started, In Progress, Pending External Verification, Pending Certificate, Completed and Cancelled.
- Learnership Region: Populate drop down list from Event Management Region.

Note: On adding of a pipeline a warning message should be displayed: “Are you sure you want to create this pipeline, because once created, the pipeline cannot be changed.”

# How to Manage the Learnership Pipeline

[How to Manage the Learnership Pipeline](#)

The steps in managing a learnership are dependent on each other. It is therefore important to complete the steps in a certain order as shown in the mind map above:

STEP 1: Enter planned values

STEP 2: Create Events

STEP 3: Book Learner Group on Events

STEP 4: Create Learner Records

STEP 5: Attendance Register

STEP 6: Update Learner Records

STEP 7: View and Update Actuals

# How to work with Learnership Pipeline Programmes

Learning

Default Signify (Signify) (7)

+ Add Learnership Pipeline

jhb

Search Status

Search Learnership

Select begin date

Search SETA Qualification

Select end date

	Actions	Group	Learnership	Begin Date	End Date	Status	Region	Number of Employees linked to group	Number of Terminated Employees	Retention Rate
+	<div>Actions</div> <div>Edit</div> <div>Programmes</div> <div>Employees</div>	JHB/16/01	Further Education and Training Youth Development Level 4 SETA 48541	2016/06/01	2016/08/31	Not Started	Smollan JHB North Room 890	4	1	75.00
+	<div>Actions</div>	JHB/16/02	Wholesale & Retail Merchandising Operations Level 2 SETA 58206	2016/06/01	2016/08/31	Not Started	Smollan JHB South Room 334	5	2	60.00

Export to excel

HOW DID I GET HERE?

The first step in the learnership process is to create the Rollout plan with planned values. To enter planned values click on **Programmes** in the Actions drop down list on the Learnership Pipeline List screen.

# Learnership Pipeline Programmes List Screen

## Learnership Pipeline Programmes List Screen

- A list of all the programmes linked to the selected learnership will be displayed.
- The following functionalities are available per programme:
  - Enter planned values that will be used for generating the rollout plan and events.
  - Display learner records with the opportunity to enter assessment and moderation detail as well as upload documents.
- It is important that the planned values be entered first, before you can continue with Step 2, i.e. "Create Events".
- Only the System/Learnership Administrator can execute the actions on this screen.

### STEP 1 (Planned Values):

The first step in the learnership process is to capture planned values (rollout plan detail) for all the programmes in the list by selecting **Planned Values** in the Actions dropdown.

## STEP 1: How to Work with Planned Values (Rollout Plan)

### STEP 1: How to Work with Planned Values (Rollout Plan)

The System/Learnership Administrator is responsible for maintaining the Rollout Plan detail. There are mainly two types of interventions i.e. Classroom and POE Submission used when entering planned values.

#### The Classroom Intervention:

- On the Rollout Plan Detail screen, select the Theoretical Training Classroom intervention from the dropdown list on top of the screen.
- Only the **Training Start Date** and **Training End Date** are mandatory fields and will be used when events are created in Step 2. However all the values should be filled in for the Classroom intervention because these values will be printed on the Rollout Plan report.

## The POE Submission Intervention:

- On the Rollout Plan Detail screen, select the POE Submission intervention from the dropdown list on top of the screen.
- Only the **Training Start Date** and **Training End Date** are mandatory fields and will represent the planned POE Submission date.
- The Training Start Date and Training End Date will be used to create the POE Submission learner records later in the Learnership process.
- For reporting purposes the POE submission date should also be entered for the POE Intervention.

After the values have been entered and saved you can use the Rollout Plan report to validate the inputs. This is an important step to ensure the Start and End Dates have been entered correctly because the dates will be used to create bulk events in the next step of the Learnership process.

# How to Print the Rollout Plan Report

## How to Print the Rollout Plan Report

Click on the **Print Rollout Plan** button on the Learnership Pipeline Programmes screen to view the Rollout Plan Report.

# Example of the Rollout Plan Report

## Example of the Rollout Plan Report

# STEP 2: How to Create Events

## STEP 2: How to Create Events

### STEP 2 (Create Events):

This functionality will automatically create and schedule the "Theoretical Training" events for all the Classroom type interventions linked to the programmes in the list.

All the training start dates and training end dates for all the theoretical training interventions per programme should be entered, before events can be created.

To create events click on the "Create Events" button.

Before the actual events are created, a validation screen will be displayed, showing the outcome of the bulk event creation procedure. You can choose to continue or cancel the process.



- Events will be created automatically using the following values:
  - Create an event only if the intervention pathway type = Classroom
  - Ref no = The next available number
  - Created Date = Today
  - Created User = System/Signify
  - Event Status = Planned
  - Status = Not Yet Published
  - Training Intervention = Intervention Name
  - Start Date = Planned training start date    Start Time = 09:00
  - End Date = Planned training end date    End Time = 16:00
  - Include non-working days = Yes
  - Provider = Smollan L&D (This value should be pre-defined in the “Event Management | Master Data | Training Providers” master table, otherwise the event will not be created.
  - Venue = blank
  - Coordinator = blank
  - Send event notifications from coordinator address = No
  - Facilitator = Rollout plan facilitator name or blank
  - Attendees allowed: Min=0 Max=100
  - Attendee bookings will be accepted up to **1** days before...
  - Attendee cancellations will be accepted up to **1** days before...
  - Classification = Smollan - Local
  - Category = Foundational (This value should be pre-defined in the “Event Management | Master data| Training | Category” master table otherwise the event will not be created)
  - Region = Learnership Pipeline | Region
  - Course Type = Internal
  - Intended Target Market = blank
  - Terms and Conditions = blank

# How to work with Learnership Pipeline Employees

**Learning**

Default Signify (Signify) ▾

(7)

+ Add Learnership Pipeline

jhb

Search Learnership

Search SETA Qualification

Search Status ▾

Select begin date

Select end date

⬇	Actions ⬇	Group ⬇	Learnership ⬇	Begin Date ⬇	End Date ⬇	Status ⬇	Region ⬇	Number of Employees linked to group ⬇	Number of Terminated Employees ⬇	Retention Rate ⬇
+	<div>Actions ▾</div> <div>  Edit              Programmes             <div>  Employees </div> </div>	JHB/16/01	Further Education and Training Youth Development Level 4 SETA 48541	2016/06/01	2016/08/31	Not Started	Smollan JHB North Room 890	4	1	75.00
+	<div>Actions ▾</div>	JHB/16/02	Wholesale & Retail Merchandising Operations Level 2 SETA 58206	2016/06/01	2016/08/31	Not Started	Smollan JHB South Room 334	5	2	60.00

Export to excel

### HOW DID I GET HERE?

System Administration | Modules | eLearning | Learning Management | Learnership | Pipelines | Employees

The next step in the learnership process is to book learners on events. Click on Employees in the Actions drop down list on the Learnership Pipeline List screen.

## STEP 3: How to Book Employees on Events

Learnership	48541/FET/L4	Further Education and Training Youth Development Level 4
Qualification	48541	National Certificate: Further Education and Training Youth Development [Smollan] [48541]
Learnergroup	JHB/16/01	

+	Actions	Employee Number	Employee Title	Employee ID Number	Employment Type	Termination Date	Total Credits Earned	Complete %	Status	Booked on # out of 5 events
+	Actions	C690	Cherante King	8201010000000	Temporary External		46	100	Competent	5
+	Actions	C669	Glenda Johnston	9412030000000	Full Time Permanent		43	93.48	Not yet competent	5
+	Actions	emp4	Henry Da Silva	9205105079089	Contract External		18	39.13	Not yet competent	5
+	Actions	8299	Michelle Dalvie	9412030000000	Temporary External	2016/07/12	38	82.61	Not yet competent	5

Book Learner Group on Event

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### STEP 3 (Book learner group on event):

After events have been created in STEP 2, the group of learners can now be booked on the events. Click on **Book Learner Group on Events** button.

Before the learners are booked on the events, a validation screen will be displayed, showing the outcome of the bulk event booking procedure.

## STEP 4: How to Create Learner Record

Learnership	48541/FET/L4	Further Education and Training Youth Development Level 4
Qualification	48541	National Certificate: Further Education and Training Youth Development [Smollan] [48541]
Learnergroup	JHB/16/01	

+	Actions	Employee Number	Employee Title	Employee ID Number	Employment Type	Termination Date	Total Credits Earned	Complete %	Status	Booked on # out of 5 events
+	Actions	C690	Cherante King	8201010000000	Temporary External		46	100	Competent	5
+	Actions	C669	Glenda Johnston	9412030000000	Full Time Permanent		43	93.48	Not yet competent	5
+	Actions	emp4	Henry Da Silva	9205105079089	Contract External		18	39.13	Not yet competent	5
+	Actions	8299	Michelle Dalvie	9412030000000	Temporary External	2016/07/12	38	82.61	Not yet competent	5

Book Learner Group on Event

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## STEP 4 (Create Learner Records):

After learners have been booked on the events, learner records for all the learners can now be created.

The following learner records are automatically created for all the learners in the Learnership Pipeline when clicking on the **Create Learner Record** button:

- A Qualification learner record that will show total progress of the learner on the Learnership Qualification.
- A Programme learner record will indicate the progress on the Programme.
- Training learner records for all the interventions (Theoretical Training and POE submission).

## How to View Learner Records

### 1. Using the Learnership Pipeline Screen:

- *System Administration | Modules | eLearning | Learning Management | Learnership | Pipelines | Programmes | Select a Programme | Employee Learner Records*

### 2. Using the Manage Employees Screen:

- *Manage Employees | Select an Employee | Employee Development | Learner Records*

# How to Update Employee Attendance

## HOW DID I GET HERE?

System Administration | Modules | Event Management | Training Scheduling | Manage Training Attendance Register

After the learners have been booked and scheduled on an event and training has started. The attendance should be captured for the learners.

Attendance is captured by a System/Learnership Administrator.

## STEP 5: Update the Attendance Register per Event

Save Add Employee Delete Print Barcode Show Attendee Report Monitor Attendance

Previous 10 || Next 10

Select	Log to Learner Record	Reference	Employee Number	Surname	Name	Booking Type	Outcome	Delete			
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	364	C664	Irwin	Annette	Normal Booking	WRMO/L2/58206 - LEARNING PROGRAMME 1 TRAINING				
		Cost Centre Desc									
		Attendance Type	Not Selected	Pretest	0	Post Test	0	Score	0	Comment	
		Competent	Not yet competent	Cost	0	Cost Centre		Approving Cost Centre			

### STEP 5: (Attendance Register):

After learner records have been created in STEP 4 the attendance on training events can be captured.

Note: Classroom Training Intervention's **Attendance Type** and **Competent** fields can only be updated in the attendance register and NOT from the Learnership Pipeline Module.

Update the following fields in the attendance register for the whole event (that can stretch over more than one day):

- Attendance Type: Attended, No Show, Cancelled and Not Selected
- Competent: Competent, Not yet Competent,
- Facilitator Comment.

# Update the Attendance Register per Event per Day

## Update the Attendance Register per Event per Day

The **Monitor Attendance** functionality gives the user the opportunity to enter employee attendance per day. This screen will only be populated when the Attendance Type on the Attendance Register is "Attended". The attendance per day will enable capturing data for reporting purposes only.

# How to Update Learner Records

## How to Update Learner Records

### HOW DID I GET HERE?

System Administration | Modules | eLearning | Learning Management | Learnership | Pipelines | Programmes | Employee Learner Records

After the attendance for Classroom Interventions have been entered, the POE Submission training intervention's status can now be updated.

# STEP 6: How to the Update Learner Record Status

## STEP 6: How to the Update Learner Record Status

### STEP 6: (Update Status for Learner Records):

- The following information can be captured per learner record:
  - Assessment: Assessor Name, Assessment Date and Assessor Comment.
  - Internal Moderations: Internal moderator Name, Internal moderator Date and Internal moderator Comment.
  - External Moderations: External moderator Name, External moderator Date and External moderator Comment.
  - Comments: Additional comments.

- Documents: Upload of documents.
- Classroom Training Intervention status Update:
  - The user cannot update the status to "Competent" for **classroom** training interventions from this screen. The status will automatically be set to "Competent" when the complete and competence status for classroom interventions is updated from the Events | Attendance Register or Manage Employee | Learner Records or Attendance Register.
  - The user can however update the status to 'No Book, Absent or TBA'.
  - The user cannot update the Status from Competent back to any other status on this screen. In the event that this is needed, the values should be updated from Manage Employee | Learner Records.
- POE Training Intervention status update:
  - The user has the opportunity to update the status of the POE submission training intervention learner record to 'Competent, No Book, Absent or TBA' on this screen.
  - When the Competent option is selected and saved, the Manage Employee learner record will be updated with values: Completed = 'Y' and Competent = 'Y' and Complete date = Today's date.
  - The user cannot update the Status from Competent back to any other status on this screen. In the event that this is needed, the values should be updated from Manage Employee | Learner Records.
  - When a learner record's status is updated to 'Completed' and 'Competent' from the learner record or attendance screen, the learnership status will automatically be set to 'Competent'.

## STEP 7: View and Update Employee's Programme Actuals

Learnership	48541/FET/L4	Further Education and Training Youth Development Level 4
Qualification	48541	National Certificate: Further Education and Training Youth Development [Smollan] [48541]
Learnergroup	JHB/16/01	

Actions ▾	Programme ▾	Total Credits ▾	Credits Earned ▾	Complete % ▾
<b>Actions ▾</b>	48541 Literacy	2	2	100
<b>Actions ▾</b>	48541 Numeracy	16	16	100
<b>Actions ▾</b>	FET/L4/48541/Learning Programme 1	3	3	100
<b>Actuals</b>	48541/Learning Programme 2	17	17	100
<b>Actions ▾</b>	FET/L4/48541/Learning Programme 3	8	8	100

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## HOW DID I GET HERE?

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## STEP 7 (View and Update Programme Actuals):

- View actual progress on the Programme by clicking on the “Actuals” link in the Actions drop down list.
- The learner’s programme status update on this screen will work in the same way as updating the status on the learner record discussed in STEP 6.
- A detail progress screen is displayed on screen “Employee Programme Actuals Detail”.

# Employee Programme Actuals Detail Screen

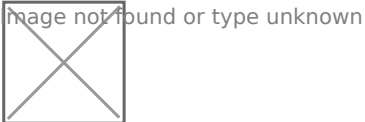
[Employee Programme Actuals Detail Screen](#)



# Learnership Reports

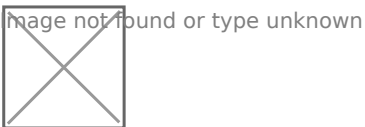
## Attendance Report

A report showing employee event attendance per day for the selected Learnership.



## Learner Profile Report

A report showing the detail progress of a learner on a Learnership.



## Full Learnership Report

A report showing detail of all the learners on the selected Learnership.



## Full Learnership Report

### Search Criteria

Learnership Title	58206 Learnership
Learnership Start Date	2016/04/01
Learner Group	
Employee Name	
Employee Surname	
Employee Number	
Employee ID Number	

[Search](#)[Clear](#)[Close](#)

### Export Report

Export All Results to Microsoft Excel Spreadsheet [Export](#)

### Additional Info.

Date of Report: 2017/05/22  
Course Name: 58206 Learnership  
Course Start Date: 2016/06/01  
Course End Date: 2016/11/30  
Course Credits: 29  
Total Number of Learners Enrolled: 2  
Total Number of Learners Completed: 0

Employee Name	Employee Number			ID Number			Race			Age		
Bianca ARRIES	2127			7909200229081						37		
	Skills Programme	Module Name	Credits	Trainer	Trainer Date	Assessor 1	Assessment Date 1	Assessment Comment 1	Moderator 1	Moderation Date 1	Moderation Comment 1	Assessor 2
	58206 Programme 1	U2_15593	15		2016/06/13							
		119463	5									
		9654	4									
	58206 Programme 2	7509	5		2016/07/04							

# Learner book Control and Achievements Report

A report showing the number of credits obtained and percentage complete for all learners on the selected Learnership.



## Learner Book Control and Achievements Report

### Search Criteria

Learnership

58206 Learnership - PTA/16/01

Search

Clear

Close

### Export Report

Export

All Results

to

Microsoft Excel Spreadsheet

Export

Employee Details							58206 POE 1 - U2_15593			58206 Theoretical Training 1 - 9654, 119463		
Employee Number	Surname	Name	ID Number	Group	Total Credits Obtained	% Complete	15	Credits obtained	Facilitator Comments	9	Credits obtained	Facilitator Comments
1167	Shona	ANDERSON	7006210280087	PTA/16/01	0	0	TBA	0		TBA	0	
2127	Bianca	ARRIES	7909200229081	PTA/16/01	0	0	TBA	0		TBA	0	Facilitator comment

# Rollout Plan Report

A report showing a schedule of all the training programmes on a Learnership with planned dates.

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