

Customer Checklist

Skills Checklist



TAKE NOTE:

- This checklist is only a guideline to perform the the annual skills submission. You may also book a consultation.

Step	Description	Navigation Pane	✓																
1	<p>Setup Skills Company Information Screen</p> <p>Setup the links of Skills Reporting codes to existing Parameter codes. (e.g. Job Title to OFO Code)</p>	<p>Expand Double click Double click Click on Click on</p> <p>Company Management Company the applicable Company Skills Information the Skills Analysis Code Link tab</p> <table border="1"> <thead> <tr> <th>Skills Reporting Code</th> <th>Link to Parameter Code</th> </tr> </thead> <tbody> <tr> <td>OCCLEVEL - Occupational Level</td> <td>JOBGRADE - Job Grade</td> </tr> <tr> <td>OCCCATRY - Occupational Category</td> <td>JOBTITLE - Job Title</td> </tr> <tr> <td>WORKPLAC - Workplace</td> <td></td> </tr> <tr> <td>PROVINCE - Province</td> <td></td> </tr> <tr> <td>OFOCODE - OFO Code</td> <td>JOBTITLE - Job Title</td> </tr> <tr> <td>OFOCAT - OFO Category</td> <td></td> </tr> <tr> <td>MUNICIPALITY - Municipality</td> <td></td> </tr> </tbody> </table>	Skills Reporting Code	Link to Parameter Code	OCCLEVEL - Occupational Level	JOBGRADE - Job Grade	OCCCATRY - Occupational Category	JOBTITLE - Job Title	WORKPLAC - Workplace		PROVINCE - Province		OFOCODE - OFO Code	JOBTITLE - Job Title	OFOCAT - OFO Category		MUNICIPALITY - Municipality		
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2	<p>Setup OFO Codes</p>	<p>Expand Expand Double click Update</p> <p>Parameters Employee the applicable Parameter Code the Skills/OFO Information</p>																	
3	<p>Link Parameter codes to skills codes</p>	<p>The screenshot shows three tables in a software interface:</p> <ul style="list-style-type: none"> Job Title Type: A table with columns 'Code' and 'Short Description'. The first row is 'A01' with 'Accountant' as the short description. Skills Information: A table with columns 'Company', 'Occupational Category', 'Occupational Level', and 'Province'. The first row is '001 - Bu...' with '2 - Professionals' as the occupational category. OFO Information: A table with columns 'Company', 'OFO Code', and 'OFO Version Type'. The first row is '001 - Building Bl...' with 'V1 - V1' as the version type. The second row is '001 - Building Bl...' with 'Accountant' as the OFO Code and 'V2 - V2' as the version type. 																	
4	<p>Complete the relevant Position Skills Information (if applicable)</p>	<p>Expand Double click Double click Click on</p> <p>Job Profile Management Positions the applicable Position Skills Information</p>																	
5	<p>Complete the relevant Employee Skills Information</p> <p>Employee Basic Information Tab</p> <ul style="list-style-type: none"> Gender 	<p>Expand Double click Open Click on</p> <p>Employee Management Employees Employee Details on the applicable employee Skills Information</p>																	

	<ul style="list-style-type: none"> Racial Group Foreign Indicator Disabled <p>Employee - Skills Information</p> <ul style="list-style-type: none"> Employee's NQF level to indicate the highest level of qualification Type of Employment: Permanent or Non-Permanent Province Municipality OFO Code 	<p>Note: If an employee is an internal facilitator the user will indicate it on this screen.</p>	
6	<p>Print the Skills Exception Report</p> <p>Identify and complete outstanding information</p>	<p>Expand Double click Expand Expand Double click</p>	<p>Reports All Reports Skills Skills Exception Skills Exception</p>
7	<p>Setup Strategic and Skills Priorities (if applicable).</p>	<p>Expand Expand Double click Click on</p>	<p>Parameters Learning and Skills Development Skills Priority/Strategic Priority New</p>
8	<p>Setup Training Codes:</p> <ul style="list-style-type: none"> Intervention Cost Intervention Provider Intervention Reason Intervention Result Intervention Subject Dictionary Training Dictionary Training Type 	<p>Expand Expand Double click Click</p>	<p>Parameters Personnel Management the applicable Description New</p>
9	<p>Setup Qualification Information Codes:</p> <ul style="list-style-type: none"> Qualification Dictionary Qualification Type 	<p>Expand Expand Double click Click</p>	<p>Parameters Personnel Management the applicable Description New</p>
10	<p>Load Planned and Attended Training</p> <p>Training can be loaded in the following three ways:</p> <ul style="list-style-type: none"> Manual transaction on employee record Create bulk training wizard Training batch (create, update or delete training transactions) 		<ul style="list-style-type: none"> Click here for manual training Click here the training wizard Click here for the training batch
11	<p>Load Qualifications</p> <p>Qualifications can be loaded in the following two ways:</p> <ul style="list-style-type: none"> Manual transaction on employee record Qualification batch 		<ul style="list-style-type: none"> Click here for manual qualification Click here for the qualification batch
12	<p>Print Skills Export</p>	<p>Expand Double click</p>	<p>Exports Skills Export</p>
13	<p>Run Macro</p>		<p>Click here to download the Macro</p>