INSETA LEARNER RECORD DATABASE (Indicium)

USER GUIDE

Version 4 2018

Table of Contents

[Section 1: Introduction Error! Bookmark not defined.](#_Toc525064646)

[**1.** **Purpose of the INSETA Learner Management System** 3](#_Toc525064647)

[**2.** **Principles of** **Error! Bookmark not defined.**](#_Toc525064648)

[**3.** **Roles and Responsibilities of Skill Development Providers** 3](#_Toc525064649)

[Section 2: Logging onto Indicium 4](#_Toc525064650)

[**1.** **System Requirements** 4](#_Toc525064651)

[**2.** **Webmail Address** 4](#_Toc525064652)

[**3.** **Rules and Security of Access** 4](#_Toc525064653)

[**4.** **Steps to Log-on** 4](#_Toc525064654)

[Section 3: Menu Overview 6](#_Toc525064655)

[Section 4: Enrolling Learners onto the LMS 7](#_Toc525064656)

[**1.** **The Learner Menu** 7](#_Toc525064657)

[2. No Records found for your Search 8](#_Toc525064663)

[**Updating or Editing Person (Learner) Data** 14](#_Toc525064664)

[**Specifications for Capturing Person / Learner Information** 15](#_Toc525064665)

[**Capturing the Person as a Learner.** 17](#_Toc525064666)

[**Programme Enrolment / Registration: Linking a learner to a qualification / skills programme.** 19](#_Toc525064667)

[**Capturing Assessments against a learner:** 21](#_Toc525064668)

[Section 5: Provider Details 25](#_Toc525064669)

### Section 1: Introduction

### Purpose of the INSETA Learner Management System

* 1. The INSETA Learner Management system (Indicium) is a repository that stores and maintains records of:
     1. Learners: their personal details, their enrolments and their achievements;
     2. Details and profiles of accredited skill development providers (SDPs) and associated qualification scope;
     3. Profiles of registered assessors and moderators and the qualifications they are allowed to assess/moderate
     4. Details of employers.
  2. The records are maintained by skill development providers and the INSETA QAP/ETQA.
  3. INSETA transmits these records bi-annually to SAQA to be loaded into the NLRD, and to the Department of Higher Education and Training’s SETMIS on a quarterly basis.

Thus, Skill Development Provider compliance to INSETA deadlines and data specifications is of the utmost importance.

### Roles and Responsibilities of Skill Development Providers

Skill Development Providers’ responsibilities include:

* 1. Capture/Upload learner enrolments onto the INSETA Learner Record Database within 7 working days of the learners commencing their studies.
  2. Capture/Upload learner achievements onto the INSETA Learner Management System within 21 working days after receipt of a signed endorsed Verification NLRD from INSETA Verifier
  3. Ensure that Administrators employed by the Skills Development Provider attend training on the INSETA Learner Management System
  4. Take full accountability for the records captured on the Learner Management System, by conducting regular quality assurance of such records
  5. Ensure learner information is captured in accordance with the INSETA Learner Record Specifications

Section 2: Logging onto Indicium

1. **System Requirements**

INDICIUM is best using ***Google Chrome*** or ***Firefox.***

1. **Webmail Address**

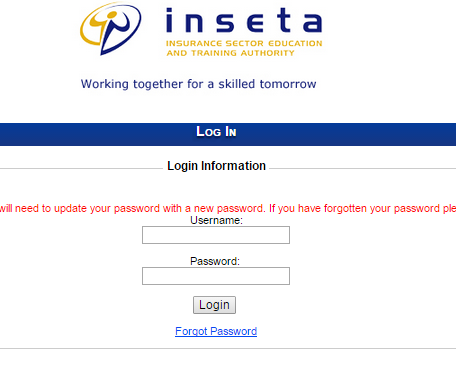
<http://indicium.inseta.org.za/Account/Login.aspx>

1. **Rules of User Access** 
   1. Access to Indicium is restricted to users by means of a **Username** and **Password**. In order to obtain access, the Provider must complete, sign and email to the Certification unit the Access Request Form. A **Username** and **Password** will then be emailed to you.
   2. Your **Password** will expire after 30 days. On expiry, the Indicium system will prompt you to change your password at the point you try to login.
   3. Usernames and Passwords are a security feature to safeguard the data contained on Indicium. It is thus critically important that users do not share their Usernames and Passwords with others. The system records all user access and activity thus enabling INSETA to identify who entered data, what data they entered and the time they entered it.
2. **How to Log on**

**Step 1:** Go the website [**www.inseta.org.za**](http://www.inseta.org.za)

**Step 2:** On the Left hand Side of the INSETA Home Page, Click on log in

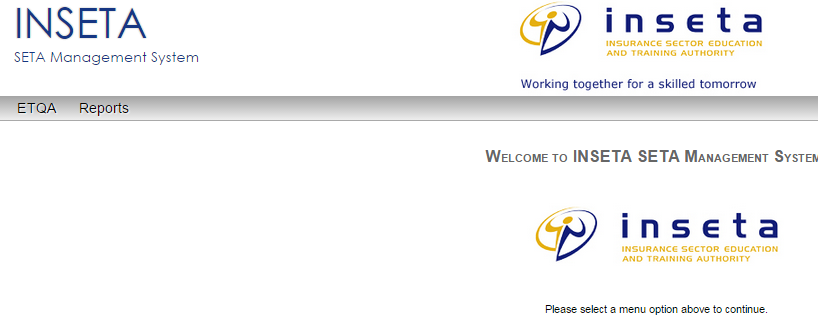
**The below screen will appear.**



**Step 3:** Enter your **Username** and **Password** (Both supplied to you by INSETA)

**Step 4:** Click on the **Login** button

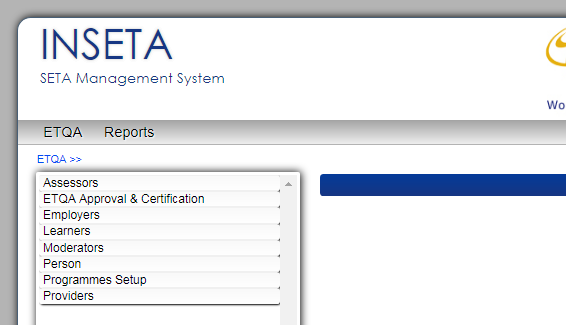
Once you have logged in the following screen will appear:



**Section 3 describes these menus.**

Section 3: Menu Overview

**Assessors Menu**Details of your Assessors



**Learners Menu**Tosearch for an existing Learner or/and Create a new Learner.

**Employers Menu**Details of your learners’ employers

**ETQA Approval & Certification Menu**To download learners’ INSETA Statements of Results

**Moderators Menu**Details of your Moderators

Clicking on “ETQA” will bring up the **Main Menu.**

**Programme Setup Menu**To set-up a Skills Programme / Qualification Modules. This menu is not active for Providers

**Person Menu**To enrol a learner who does not already exist on the database.

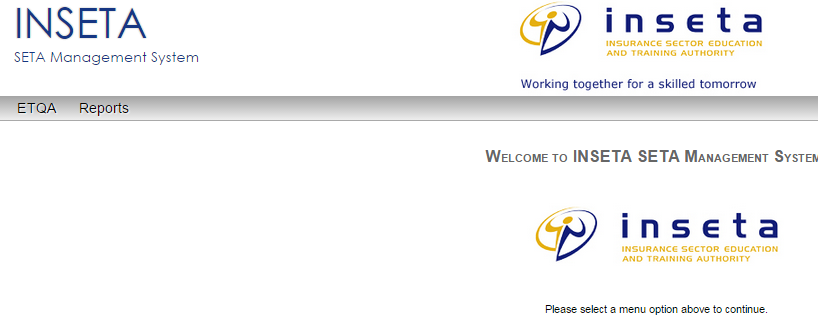
**Downloads a Report of all learners & their details enrolled with you**

**Providers Menu**

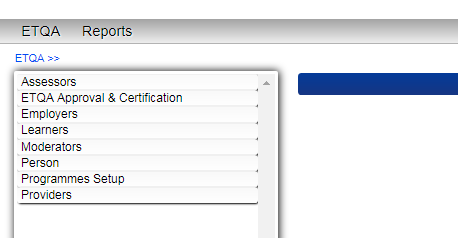
Contains details of the Skills Development Provider

Section 4: Enrolling Learners onto the LMS

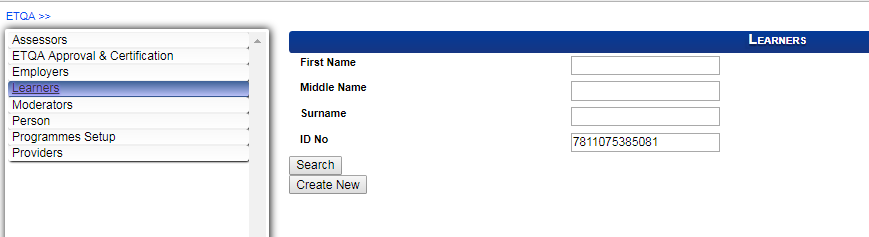
1. **Checking if the Learner exists on the LMS**
   1. Click on Menu **ETQA**



* 1. Click on **Learners**



* 1. Type in the Learner’s ID number or Passport number
  2. Click on **Search**

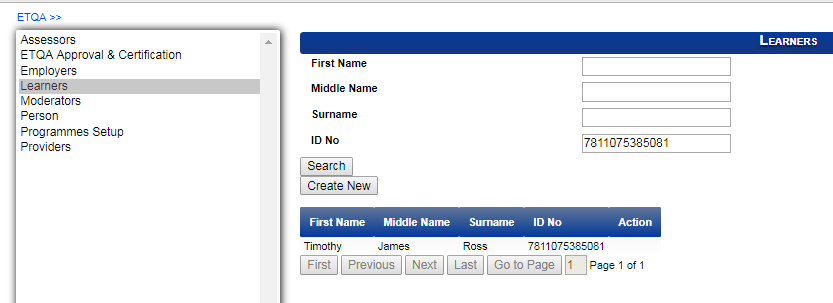


* 1. Once you have clicked on the Search button, you will see either:
     1. The learner record appears

**OR**

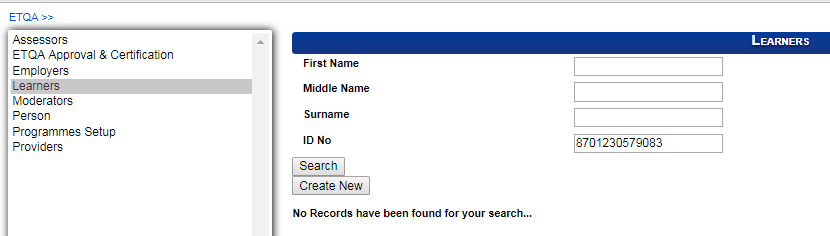
* + 1. The message **“No Records have been found for your search…”** appears

Learner Record appears:

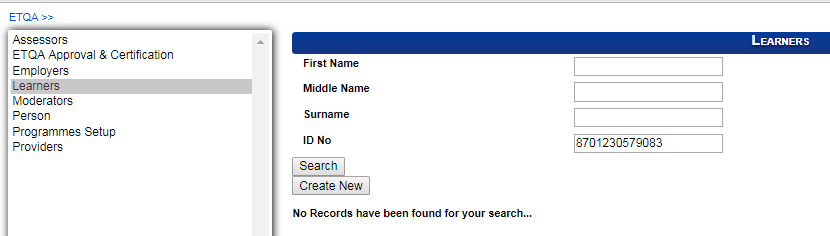


**OR**

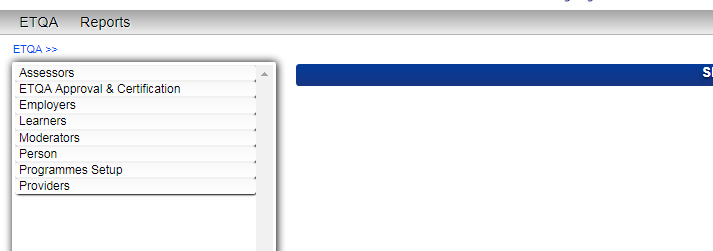
The message **“No Records have been found for your search…”**



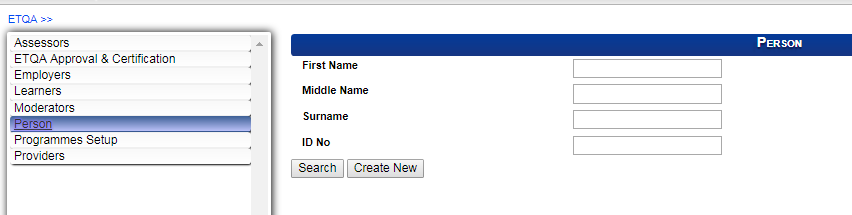
1. **No Learner Record found for your Search**



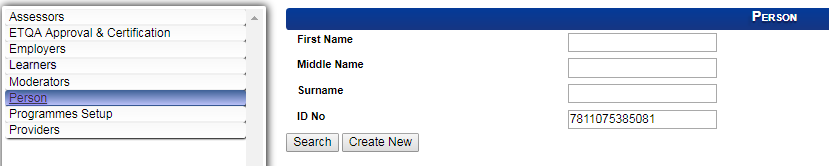
* 1. Click on **Person**



The following screen will appear:

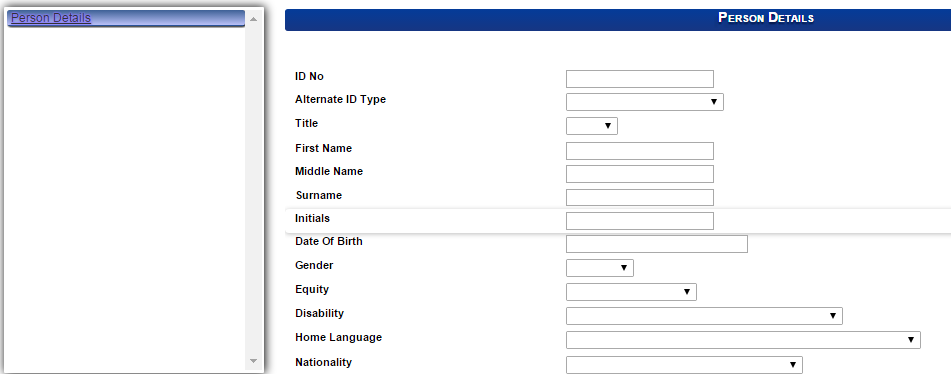


* 1. Type in the learner’s ID number or Alternative ID number (Passport number)
  2. Click on **Create New**



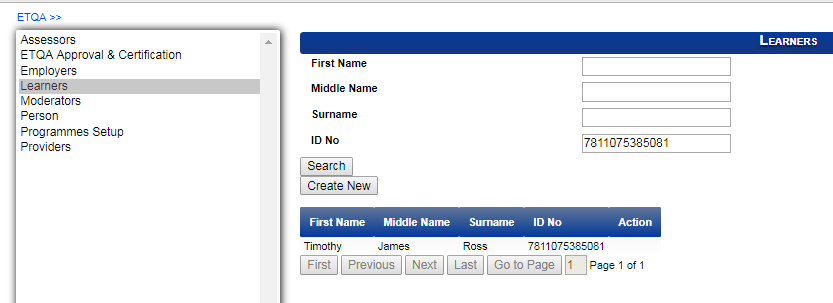
The following screen will appear

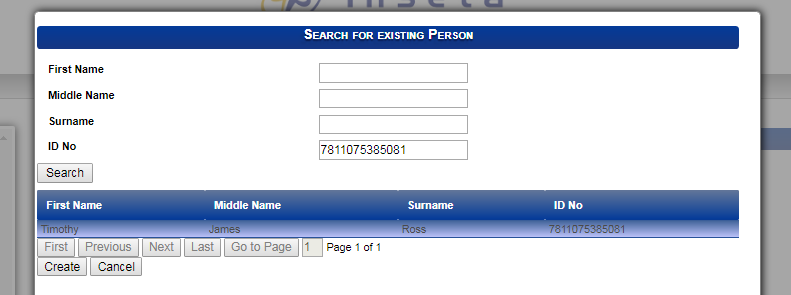
Note the Title of this screen is “Person Details”



* 1. Capture all the fields on this screen, according to the **INSETA Specifications Manual**.

1. **The Learner Record Exists on the LMS**



* 1. Highlight the Learner by clicking on the Learner’s Name / Surname / ID. 

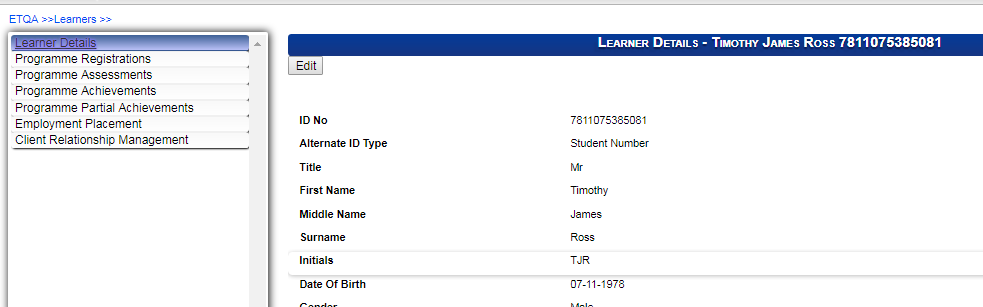
The following screen will appear, showing the learner details which were previously captured by another Skills development Provider.

Please note the change of Menu.

These menus refer to the

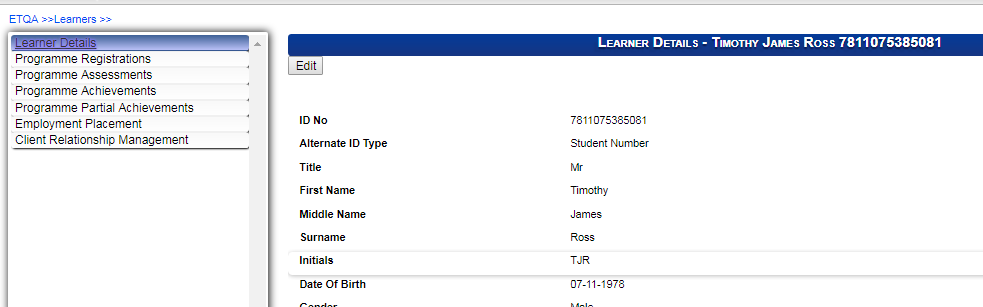
Particular learner and his/her

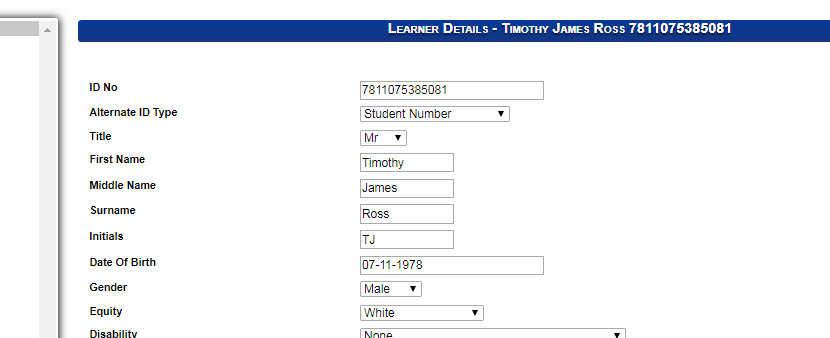
enrolments, achievements, etc



Click on **Edit** and update the learner’s information according to the information on his/her enrolment form.

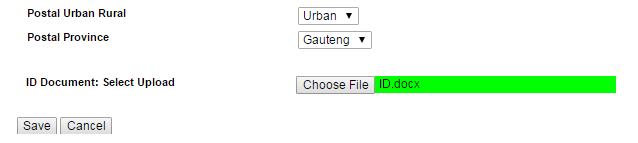
All updating / editing or capturing of this information must be in accordance with the **INSETA Specifications Manual**



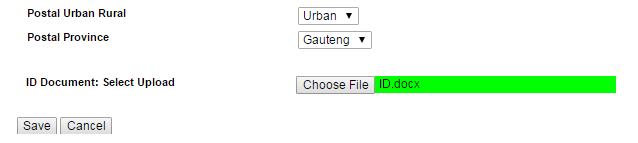


Once the learners record is correct, and complete, click on **Save**.

You will find the **Save** button at the bottom of the page.



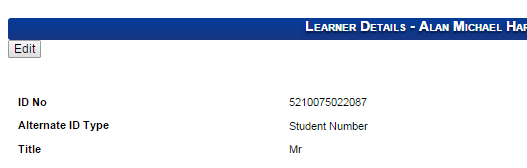
* Upload the Learner ID (Certified Copy). If an ID is not uploaded, providers will not be able to enrol a learner.



* Click on the Save button to save the information.

**Updating or Editing Person (Learner) Data**

Click on the **Edit** button at the top the learner/person record. Make changes. Click on **Save** button once all changes are done.

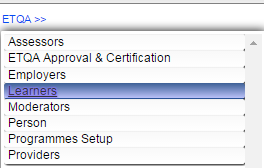


**Specifications for Capturing Person / Learner Information**

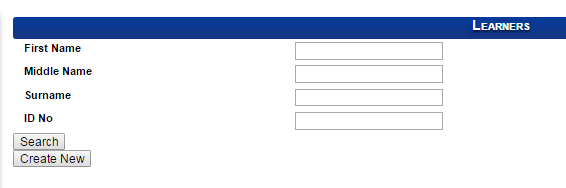
| **Field** | **Specifications** | **Illustration** |
| --- | --- | --- |
| ID Number | No spaces are allowed between numbers and or letters. | **Options:**   * South African ID number * Birth Certificate Number (SA or foreign) * Passport Number (Foreign only) |
| Alternative ID Type | SA ID Number | Blank |
|  | Birth Certificate Number | “Birth Certificate” |
|  | Passport Number | “Passport Number” |
| Title | Select from the drop-down |  |
| First Name | Enter only 1 name.  No Capital Letters are allowed, except for the first letter.  Hyphens are allowed | * Mark   M = Capital letter  ark = Lower case only  X MARK   * Lee-Ann |
| Middle Name | May enter 1 or more names.  If two or more names are entered as “middle Names”, leave a space between the names. | * Mark David   X MARK DAVID  Mark (space) David   * Mark David   X MarkDavid |
| Surname | No Capital Letters are allowed, except for the first letter.  Hyphens are allowed. | * Dlamini   X DLAMINI   * Lee-Ann |
| Initials | This field will automatically populate |  |
| Date of Birth | This field will automatically populate if entered a SA ID number.  If the ID number is a non-SA or a passport number, the provider must capture this field. |  |
| Gender | Male / Female  Will automatically populate if entered a SA ID number.  If the ID number is a non-SA or a passport number, the provider must capture this field. |  |
| Equity (race) | Select from the drop-down list |  |
| Disability | Select from the drop-down list. |  |
| Home Language | Select from the drop-down list |  |
| Nationality | Select from the drop-down list |  |
| Citizen Residential Status | Select from the drop-down list | Dual = is a resident of SA and another country  Permanent Resident = born in another country (not SA) but SA government has granted the individual permanent residence. |
| Telephone Number | Not compulsory.  No spaces are allowed between numbers. |  |
| Cell | COMPULSORY  No spaces are allowed between numbers | If learner does not have a cell phone number, enter telephone (land line) number under this field. |
| Fax | Not compulsory |  |
| Email | COMPULSORY | An email address is required for a learner to re-set his/her Indicium Password. |
| Physical Code (Address) | Please ensure this code is correct. |  |
| Physical Address 1 | 54 Duncan Village | 34 Field Road |
| Physical Address 2 | 16 Peter Road | Orange Grove |
| Physical Address 3 | Sandown | Orange Grove |
| Physical Municipality | This will automatically populate when the Physical Code is entered |  |
| Physical Urban Rural | This will automatically populate when the Physical Code is entered |  |
| Physical Province | This will automatically populate when the Physical Code is entered |  |
| Use Physical Address for Postal Address | If this box is ticked the Postal Adddress fields will automatically populate |  |
|  | If the box is not ticked, complete the Postal Address Fields |  |
| Postal Code | Please ensure the Postal Code is correct |  |
| Postal Address 1 | PO Box 54 |  |
| Postal Address 2 | Eesterus |  |
| Postal Address 3 | Eesterus |  |
| Postal Municipality | This will automatically populate when the Postal Code field is completed |  |
| Postal Urban Rural | This will automatically populate when the Postal Code field is completed |  |
| Postal Province | This will automatically populate when the Postal Code field is completed |  |

**Capturing the Person as a Learner.**

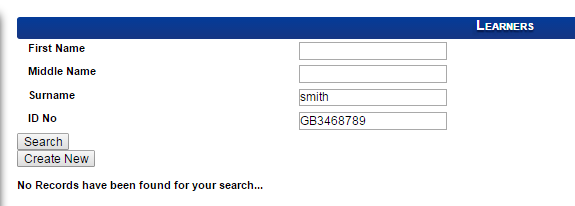
Click on **Learners** on the **ETQA Menu**



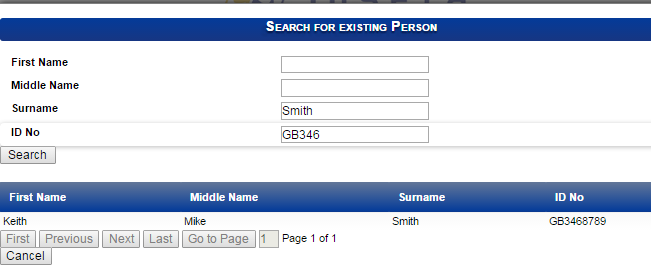
The following screen will appear:

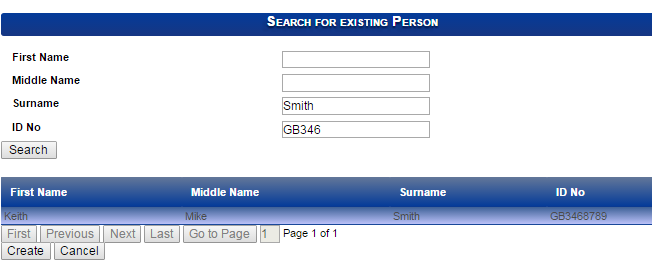


Add the Search criteria and click on **Create New**

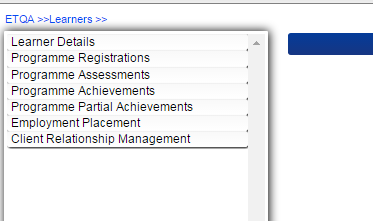


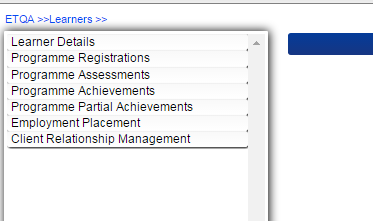
The individual will appear.. Click on the individual to highlight it. Click on “Create”





The menu on the left hand side will change, giving the sub menus for the learner.



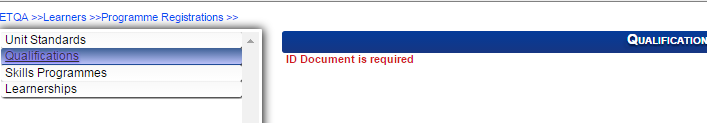
**You can now view all the credits the learner has achieved, by clicking on any or all of the menus** 

**Programme Enrolment / Registration: Linking a learner to a qualification / skills programme.**

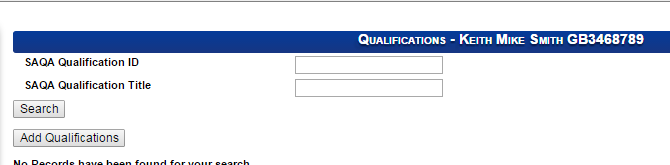
Click on **Programme Registrations**.

Select and Click on the learning programme type (qualification, skills programme, learnership or individual unit standards)

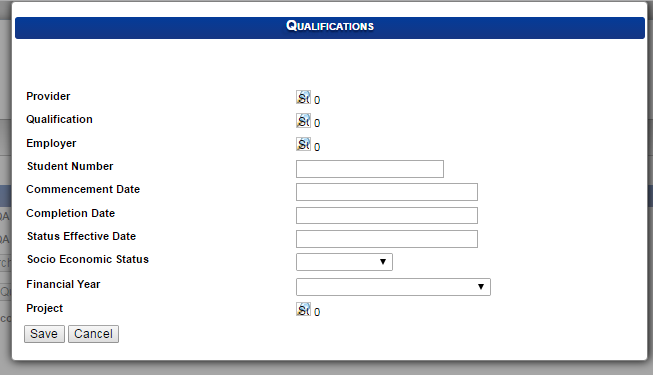
[If no ID document has been loaded for the learner, you will not be able to enrol the learner on a learning programme. Upload the ID .



Click on **Add Qualifications**

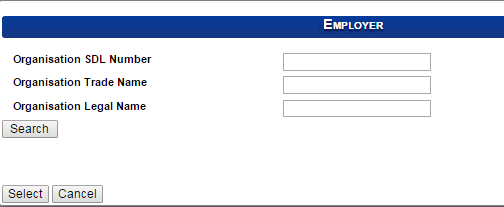


Enter the information on the new screen that appears (see below)

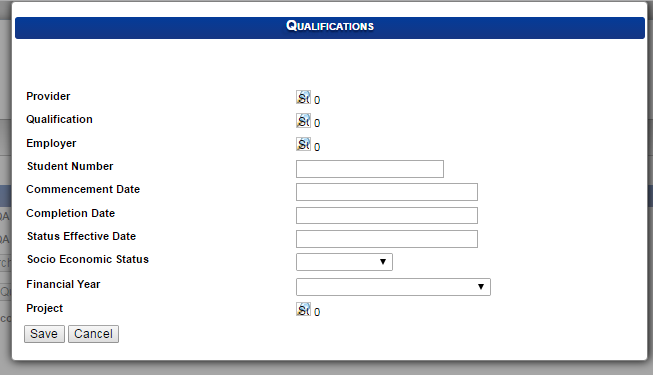


**NOTES:**

* **Completion Date:** The date the learner will complete the programme with the provider (irrespective of whether s/he has achieved or not achieved the learning programme).
* The Completion Date is the Date on which the learner **wrote the Summative Assessment**.
* If **Socio Economic Status** is selected as **Employed**, the **Employer** information must be entered.



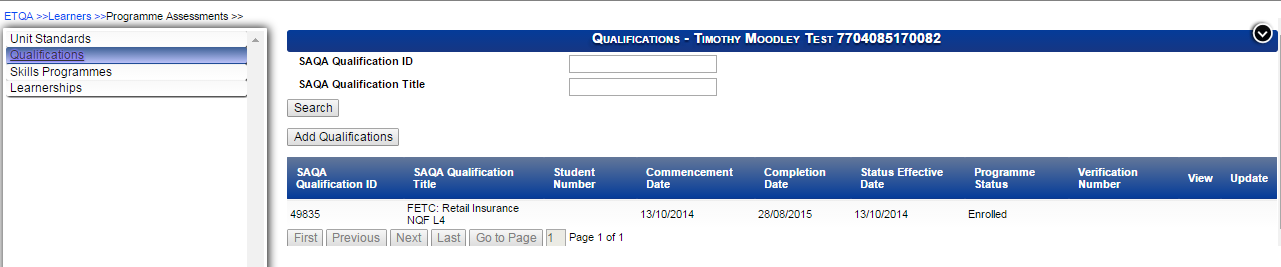
Click on **Save** to save the information



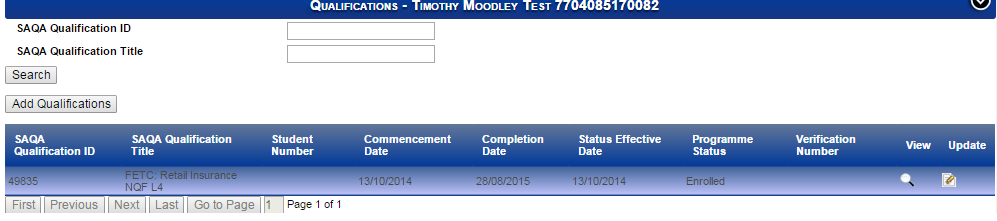
**Capturing Assessments against a learner:**

**ETQA** >> **Learners** >>[enter learner details & click on **Search**] >>Select the learner by highlighting him/her >> Click on the **magnifying glass** to open the **Learner Menu** >> Click on **Programme Assessments**.

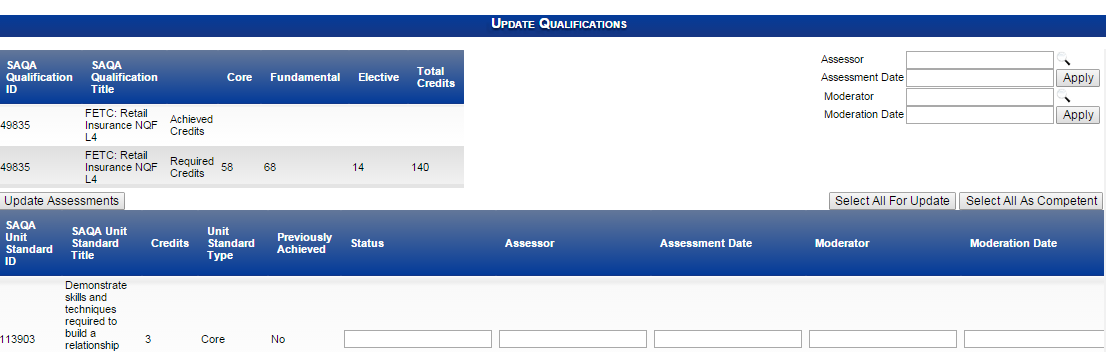
Click on the learning programme type you wish to capture assessments against.



Highlight the record



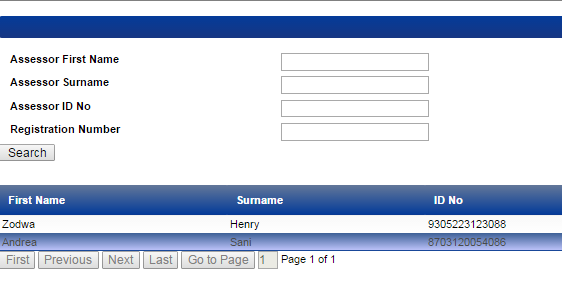
Click on the **Update icon** to capture or edit assessments.



Click on the magnifying glass next to Assessor.

The following screen appears:

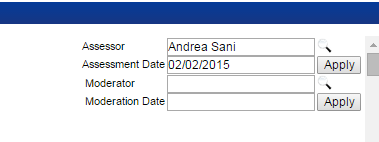
Click on **Search** to get a list of all assessors registered against the provider.



Highlight the assessor.

Click **Select**

**The assessor field will populate**



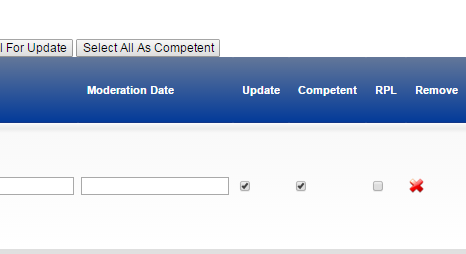
Enter the date that the assessment took place.

**Follow the same process above for the moderator.**

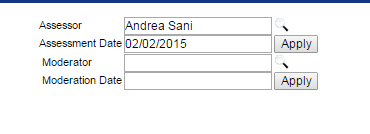
**Selecting the unit standards which were assessed.**

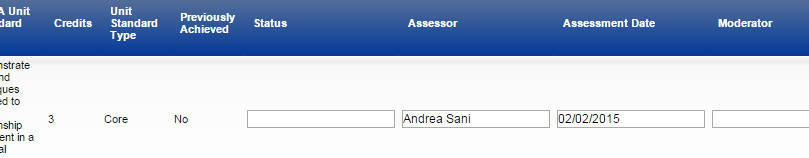
* Only select the unit standards that the learner was found **competent** for.

Select the boxes **Update** and **Competent.**



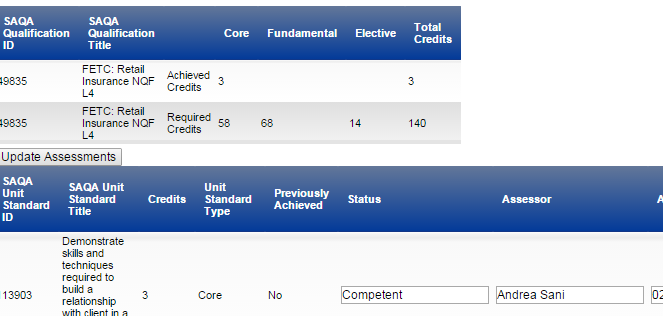
Click on **Apply.** The assessor name and assessment date will appear against the unit standard.



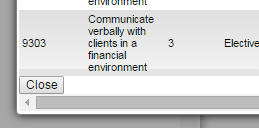


Click on **Update Assessments.**

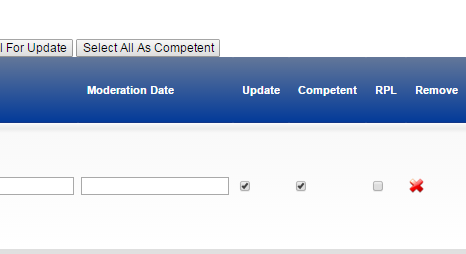
The **Status** of the unit standard will appear as **Competent.**



Once finished, click on **Close**



If you capture assessment against the incorrect Unit Standard you can delete this information by clicking on the cross:



**Section 5: Provider Details**

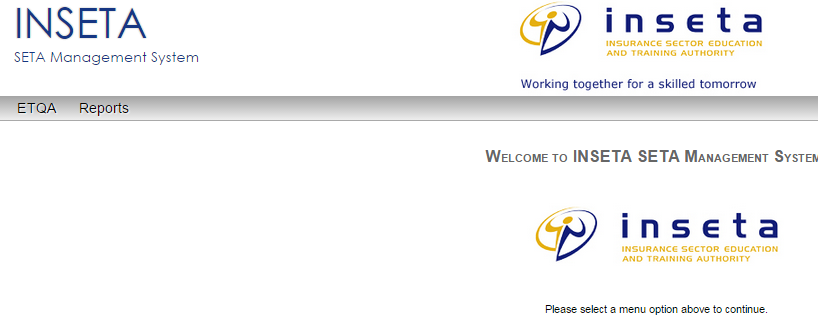
**Introduction**

Some of the data under Providers is captured by INSETA. It is the responsibility of the Provider to:

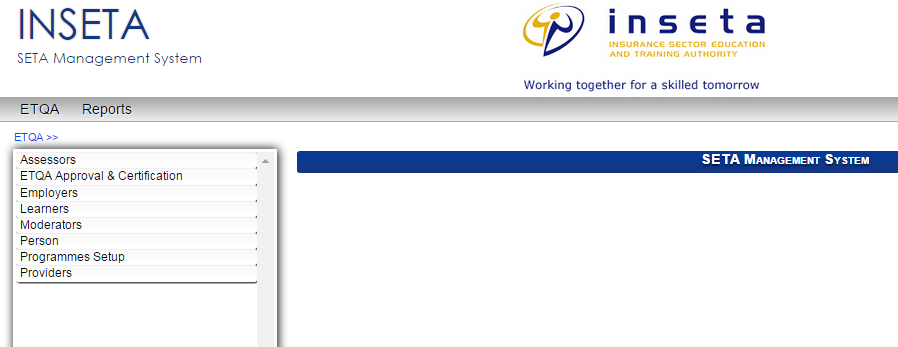
(a) check that the data captured by INSETA is correct and alert INSETA Certification unit of any errors

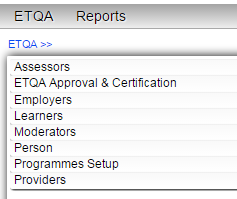
(b) Inform INSETA Certification unit of changes, such as if any contacts / users / assessors/ moderators leave their employ or change their details.

Step 1: Click on **“ETQA”**



The following screen will appear.





|  |  |  |  |
| --- | --- | --- | --- |
| **Dataset / Field** | **Description** | **Action** | **Pathway** |
| Assessors | A list of the assessors, and their details, who are linked to the provider | View only | ETQA >> Assessors >> [Click on “Search” button]>> [Click on the magnifying glass icon to view an assessors details] |
| ETQA Approval & Certification | Learner Statements of Results can be downloaded. | Download and print |  |
| Employers | A list of the employers, employer contact details and the employers learners | View only | ETQA >> Employer >> [Click on “Search” button]>> [Click on the magnifying glass icon to view an employer details] |
| Learners | A list of learners linked to provider (view only)  To create / link a learner to a provider | Edit Learner details  Register a learner against a learning programme  Capture learner assessments | ETQA >> Learners >> [Click on “Search” button]>> [Click on the magnifying glass icon to view details] |
| Moderators | A list and details of provider’s moderators and their details (view only) | View only | ETQA >> Moderators >> [Click on “Search” button]>> [Click on the magnifying glass icon to view details] |
| Person | All learners, and their personal details, for all providers. | View, and  Create New Person | ETQA >> Personr >> [Click on “Search” button]>> [Click on the magnifying glass icon to view details and create new persons] |
| Programme Setup | Skills Programmes only  Provider can view the Skills programmes linked to it.  Provider can create a new Skills Programme. | View, and  Edit existing Skills programme(s), and  Create new Skills Programme(s) | ETQA >> Programme Setup >> [Click on “Search” button]>> [Click on the magnifying glass icon to view details] |
| Providers | Takes one to another screen with additional fields particular to the provider. |  |  |

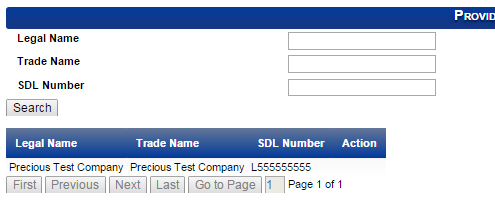
Click on **Providers.**

The following screen will appear.

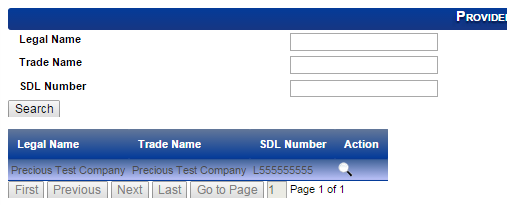
Click on Search button.



By clicking on “Search”, your provider name will appear.

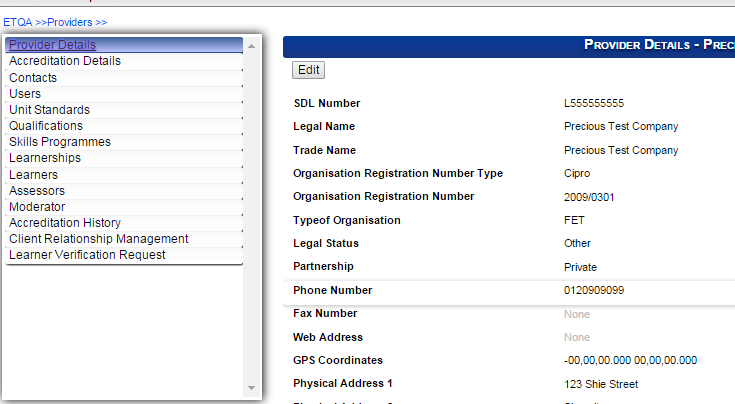


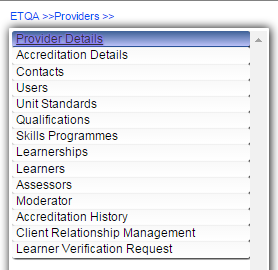
Click on your provider name and a magnifying glass icon will appear under the heading “Action”



Click on the magnifying glass.

The following screen will appear. Note the fields on the left hand side. These fields contain information about you as a provider.





| **Field** | **Description** | **Action** |
| --- | --- | --- |
| Provider Details | Provider details: legal data, contact numbers, physical and postal address | View and Edit |
| Accreditation details | Accreditation type, accreditation number, accreditation start date; accreditation end date; SAQA code (Code SAQA has allocated to INSETA); SAQA Provider Code (Code SAQA allocates to each provider) | View |
| Contacts | The details of the senior staff / manager / owner of the provider | View |
| Users | The details of the staff who work on the Indicium database | Edit existing users.  Cannot add new users. |
| Unit Standards | A list of all the stand-alone unit standards the provider is accredited by INSETA to offer | View  These unit standards pull through automatically from the qualification(s) a provider is accredited to offer. |
| Qualifications | List of qualifications the provider is accredited to offer. | View |
| Skills Programmes | List of Skills Programmes the provider is accredited to offer. | View |
| Learnerships | List of Learnerships the provider is accredited to offer. | View |
| Learners | List of learners enrolled with the provider | View |
| Assessors | List of assessors employed by the provider |  |
| Moderator | List of moderators employed by the provider |  |
| Accreditation history | A history of the providers accreditation |  |
| Client Relationship Management | Electronic copies of Verification Reports, and other documentation pertaining to the provider | View and download.  NOTE: Provider **must not** upload documents into this field |
|  | Comment facility for INSETA |  |
|  | Email facility for INSETA QA to communicate to the provider |  |
| Learner Verification Request | UNDER CONSTRUCTION. |  |