Anton Booyse

My Own Applications

I am applying for a Bursary

I am applying to be registered as an Assessor/Moderator

I am applying to be a registered SDF of the company

I am a Project Administrator and would like to be linked to a specific training provider

My Company Applications

Applications for our organisation's accreditation as a SDP
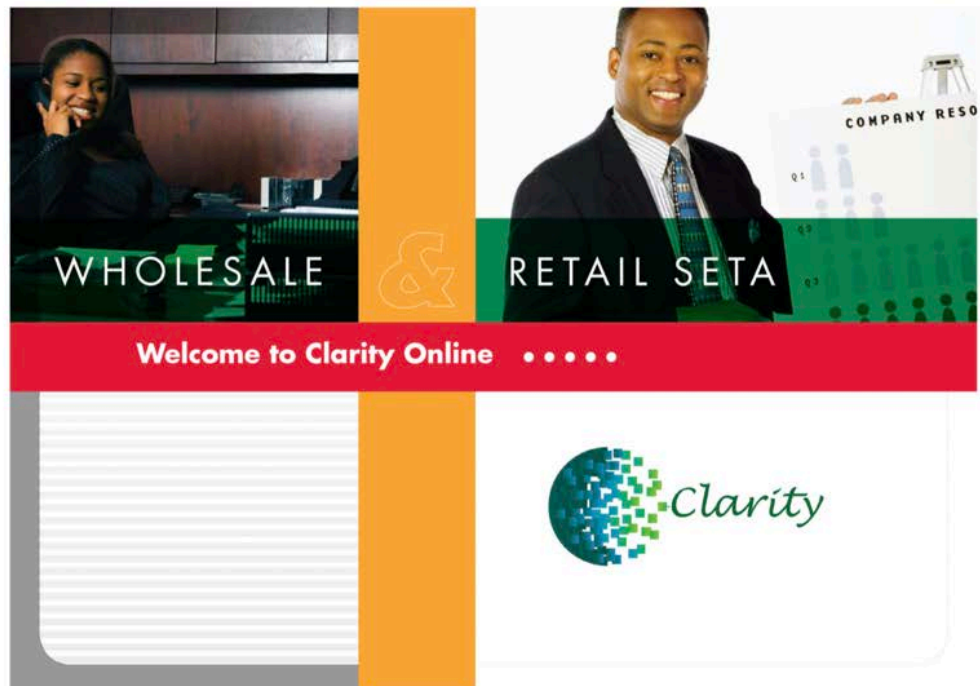
My Company Approved Profiles

Access and work as the company SDF

Access and work as the company representative with regards to allocated projects awarded to the company

My System Account

Manage my account

WHOLESALE & RETAIL SETA

Welcome to Clarity Online • • • • •

Clarity

END USER GUIDE

APPLYING FOR A Discretionary Grant

(Employers and Providers)

This end user guide focus on the responsibilities of the following system users

- Employers and Providers applying for a Discretionary Grant

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Contents

INTRODUCTION

The Projects Module is an online Module designed to manage the administration of SETA funded Projects from commencement to end.

The Projects Module hosts a user portal as well as a SETA Administration portal, where the two parties can interact but still work independently.

A User is a person who will be creating and submitting an application for a Discretionary Grant that the SETA is intending to fund.

This Guideline has been designed in a manner to provide the user with a comprehensive screen-by-screen user manual, which guides you through all the steps to register, login and completing a Discretionary Grant Application

For the user to be able to apply for a discretionary grant they have to register/login using the following address **www.wrsetaonline.org.za**

Once logged in you will work in the following key areas.
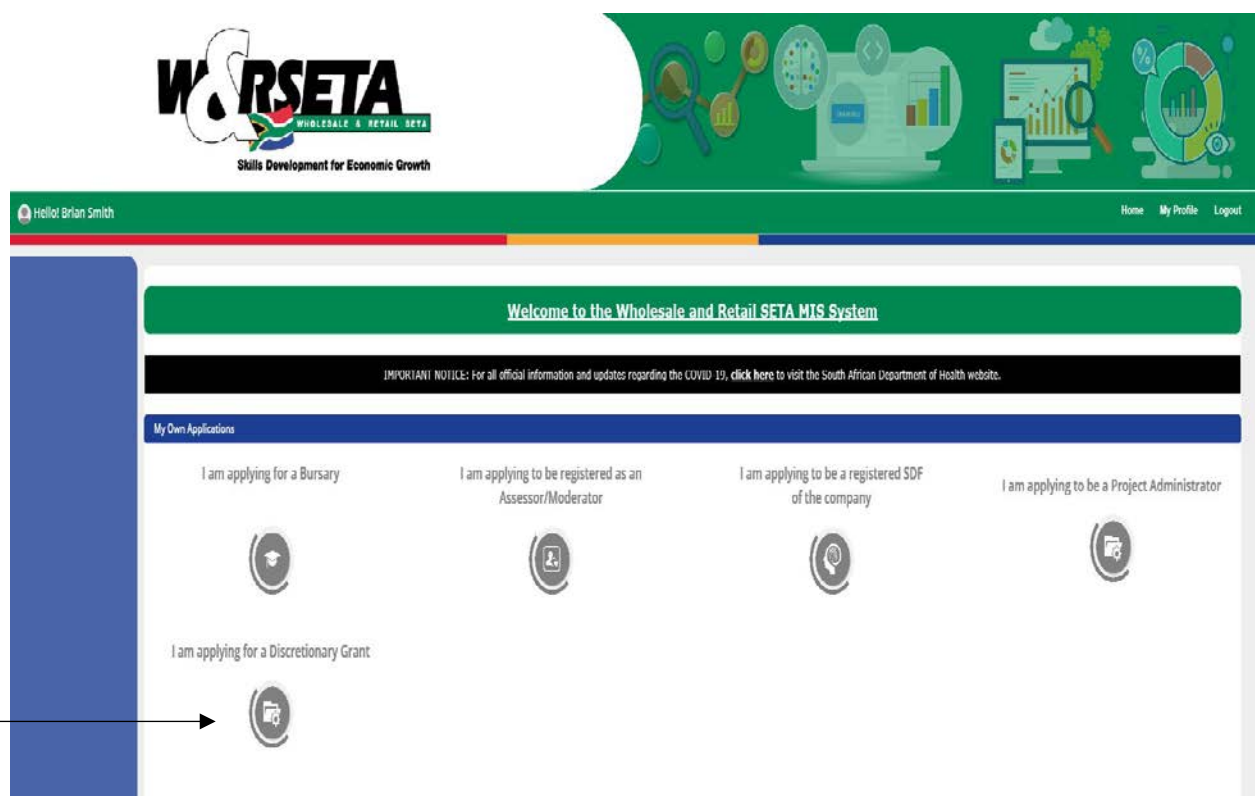
REGISTERING, LOGING IN AND RETRIVING LOGIN DETAILS

The user wanting to apply for a discretionary grant must first do either of the following:

- If they do not have an account yet, they must first register an account.
- If they already have an account, they only need to login using their login details.

LOGIN SCREEN

REGISTERING

To create a new account, click on **Register** on the Login Screen. Thereafter complete the form below with your personal information.

NB: All the fields with an asterisk are all compulsory. Once all required files are completed click on **Register**

To cancel the registration process, click on **Cancel Registration**

The following mail send by the system affirm your account created.

Dear Marco Blaauw

Thank you for registering an account at W&RSETA. Your account has been created successfully.

Your Login Details are as follows:

Username: Marco@1
Password: *******************

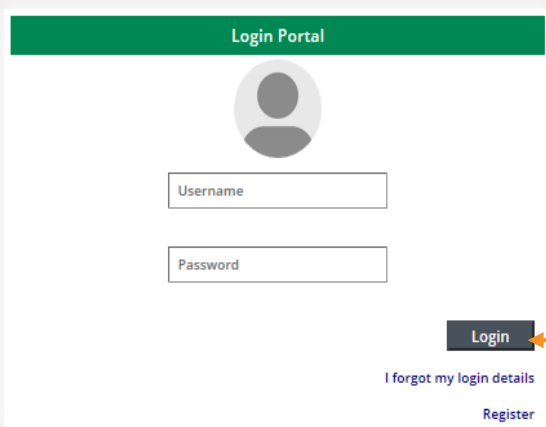Please use your username and the password you supplied to login into the system.

Kind Regards

W&RSETA Management Information System

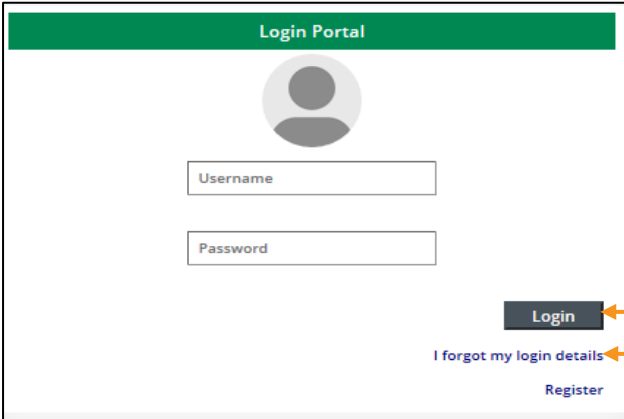Kindly do not reply to this message as this is an unattended mailbox.

After clicking the Register button on the screen above, the system will send an auto generated email to the user with the user's Login details. The user can then go back to the Login screen and use the login details to Log into the system.

On the Login screen the user will fill in the Username and Password, the click **Login.**
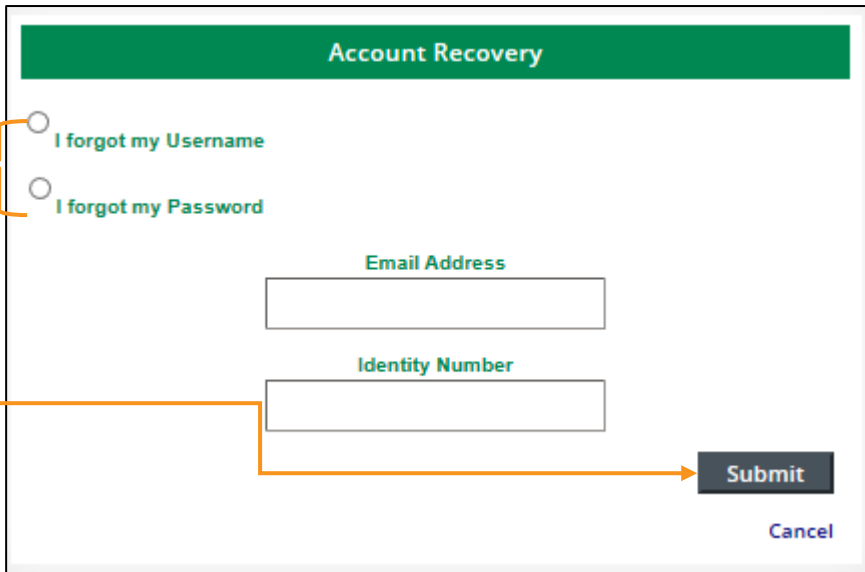
Login Portal

Username

Password

Login

I forgot my login details

Register

RETRIVING LOGIN DETAILS

To retrieve forgotten login details the user must click on "**I forgot my login details**" on the Login screen.

The user will then be required to **select** whether they forgot the username or the password. The user is also required to enter their ID number and email address used when the account was created. After clicking on **Submit** the system will send an email to the user with either the Username or the Password depending on what needed to be retrieved.
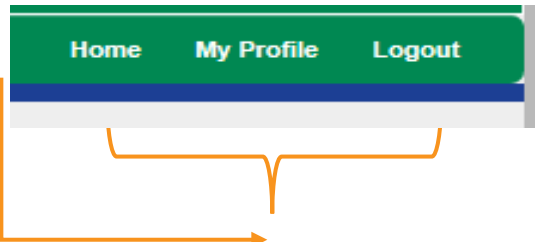
LOGING IN

The user needs to fill in their Username and Password on the Login screen, then click on **Login.** Thereafter they will be taken to the following **Home Page**.

There are two set of menus on the Home Page:

- Top Right: Users have an option to go back to the **Home** screen if they went beyond the home screen. They can also **view/edit their profile** or **Logout** if they want to close the system

- Home Page Menu: A user wanting to apply for a discretionary grant on will go to "**I am applying for a Discretionary Grant**"

Home Page
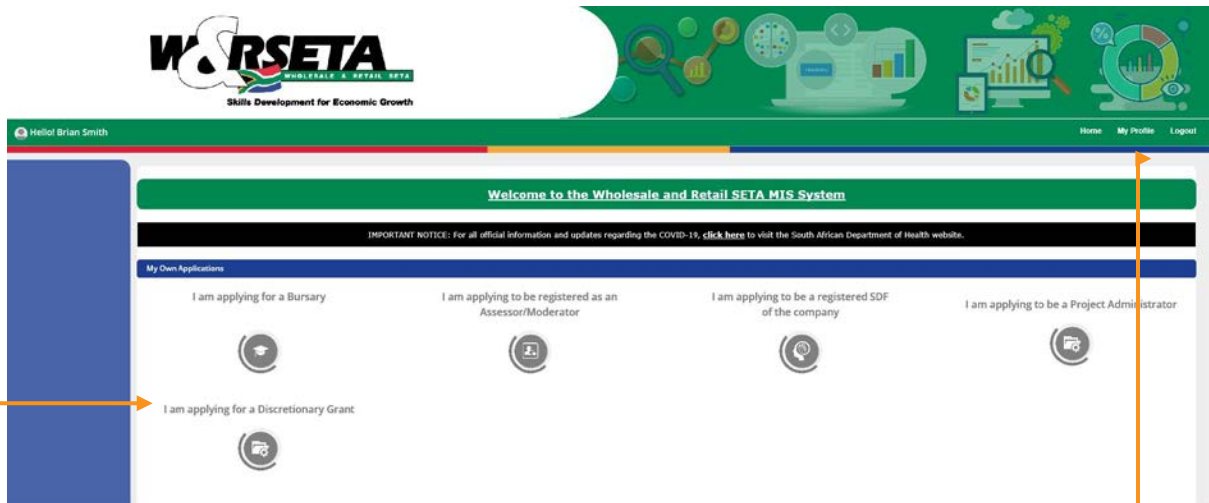
VIEWING OR EDITING YOUR PROFILE

On the Top right menu users can view and edit their profile by clicking **My Profile.** By clicking My Profile, the user will be taken to the screen below where they can perform **three tasks:**

- **Edit Profile:** The user will be able to update their detail under this section.
- **Update Username:** The user will be able to change their username under this task
- **Update Password:** The user will be able to change their password under this section

Discretionary Grant APPLICATION

After clicking on "I am applying for discretionary grant", the user will be taken to the following screen where they should be able to see all the active funding windows that are currently active and the discretionary grant applications that are linked to the user's profile (i.e. all the applications the user has ever made on then system). If it is the first time the user is applying for a discretionary grant, the list will be blank. To create a new discretionary grant application, the user must click on "**View Window**" under the active funding Windows List to view the Funding Window and then click on **Create Application** on the applicable Intervention you intend to apply for that are listed under the window:

Clicking on the create application button will display a form for you to enter the L number/Provider Code of your organisation and the Project Title of your project. Once completed you may proceed to click on **Create Application** which the system will then continue to create new application.

To open an existing application to continue working on it, the user must click on "**Open**"

Clicking the open Application button will open the following form that must be completed. The compulsory fields are indicated with a red asterisk.

COMPLETING THE APPLICATION FORM OF THE APPLICATION

On the application for there is a list of functions on the top right of form which will enable the user to be able to update certain sections on the form.

The options are as follows:

- **Close Application**
- **Edit Project**
- **Edit Project Background**
- **Link Provider**
- **Add Beneficiary**
- **Add Budget Item**
- **Submit Application**

● - Close Application
● - Edit Project
● - Edit Project Background
● - Link Provider
● - Add Beneficiary
● - Add Budget Item
● - Submit Application

	Application Status Date	29 June 2020 01:28
	Funding Window Closing Date	31 July 2020

Project Details

The first form to complete will be the Project details which will be the details of the project from your organisation to train the learners on the intervention. To edit the Project details, you will proceed to click on the button **Edit Project.** The form below will appear, and you proceed to complete the fields on the form and then click on **Save** to save the captured data.

Project Background

The second form to complete will be the Project Background which will be the brief details of the project. To edit the Project Background, you will proceed to click on the button **Edit Project Background.** The form below will appear, and you proceed to complete the field on the form and then click on **Save** to save the captured data.

Link Provider

The third form to complete will be to link/select a provider that will do the training for the learners that will be in the project. To link/select the Provider you will proceed to click on the button **Link Provider.** The form below will appear with a list of all the providers that are currently on W&RSETA MIS database. You can page through the list as well as search for your provider and then select by clicking on the button **Link.**
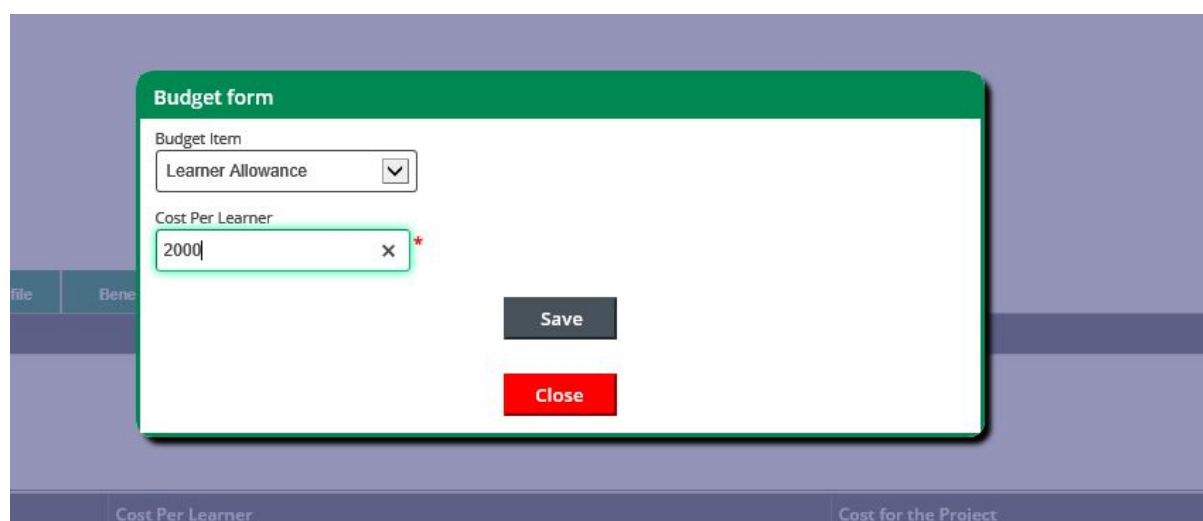
Beneficiaries

The fourth form to complete will be the beneficiaries form. The beneficiaries will be the learners that will be involved in the project to be trained on the intervention. To add the beneficiaries to the application you will proceed to click on the button **Add Beneficiary** on the list of options and the form below will appear. You will proceed to complete the form below and once the required information is completed; you can click on '**Save'.**

Budget Item

The fifth form to complete will be the budget which is the detailed breakdown of the budget. The budget item will be the budget captured for cost per learner that will be involved in the project to be trained on the intervention. To add a budget Item to the application you will proceed to click on the button **Add Budget Item** on the list of options and the form below will appear. You will proceed to complete the form below and once the required information is completed; you can click on **'Save'.**
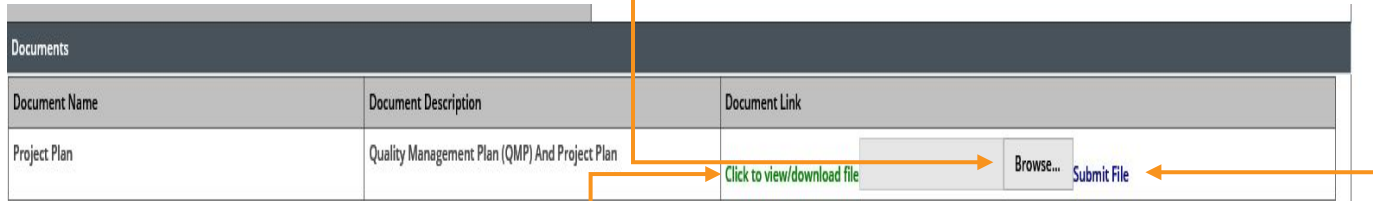
APPLICATION DOCUMENTS

Under this section the applicant must attach the required documents.

To attach the documents, the user must click **Browse** to go to the location where the file has been saved, upload the file and the click on "**Submit File**"

Documents		
Document Name	Document Description	Document Link
Project Plan	Quality Management Plan (QMP) And Project Plan	Click to view/download file Browse... Submit File

To view the files uploaded the user can click on "**Click to View/Download file**"

Once the user is satisfied that the correct information has been captured and the right supporting documents uploaded, they can the go to the top right corner and click on the "**Submit Application**" Button.

The application will be sent to the SETA for the approval process.