



CATHSSETA Integrated Management System (CIMS)

SDF & COMPANY PROFILE CHANGES
USER TRAINING MANUAL

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1. INTRODUCTION



The screenshot displays the CATHSSETA CIMS dashboard. The left sidebar contains navigation options: Profile, Logout, Dashboard, SDF (expanded), Company Management, Mandatory Grant Application, Discretionary Grant Application, Company Allocation, Learner Management, Stakeholder Relations, User Resources, ARPL, and Support. The main content area is divided into three sections: Companies, Outstanding Tasks, and Qualification Development.

Companies

Company Name	Company Registration Number	Entity ID	Company Status	Size of Company	Levy Paying	RAG	View / Edit
	1994/005424/07		Pending Change Approval	Small (1 - 49)	✓		→ ✕
	2015/336666/66		Pending Registration	Small (1 - 49)	✓	●	→ ✕

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Outstanding Tasks

Process Name	Description	Last Action User	Status	Due Date	RAG	View / Edit
Skills Development Facilitator Registration	The initial registration application for SDF Sbonisile Msimang (9101040596089) and FLYWELL TRAVEL AGENCIES PTY (L930707395) was rejected. Please login, view the rejection reason(s) and correct the issues.		Not Started	04 Sep 2019	●	→

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Qualification Development

Qualification Development Type	Qualification/Ofocode	Status	Created Date	Approval Date	View / Edit
No records found					

This guide provides the steps to follow to make any changes if the SDF and/or Company details/documents have been Rejected

1. Login to CIMS
2. On dashboard, you will see a description of the task
3. Click on View/Edit

2. VIEWING NON-APPROVALS



Task: You are an approved SDF. Please login and complete the company information for the new company: BOSS FOODS CC (L530742529)

Skills Development Facilitator Registration — Coordinator (Days To Complete 5) — Skills Development Facilitator (Days To Complete 5) Coordinator (Days To Complete 5)

The system will auto-fill some fields based on other sections/selections. These fields cannot be edited in the form and require to be amended in the originating section.

Task Action

SDF details were previously approved on 2019-08-27 12:17:55.0. Please proceed to review company information.

View Rejections Complete Workflow Task

Reject Reasons

Create Date	Reason for Rejection	Additional Information	How to fix
28 August 2019	Copy of ID/Passport not certified		

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SDF Details

Name: Sally Xoliswa Ally

RSA ID Number: 9101040596089

Equity: * Black: African

Disability: None

4. Click on View Rejections to get details about why your submission was not approved

3. BIOGRAPHICAL DETAILS CHANGES



The screenshot shows the user profile page for 'Sandra Employee'. The page is divided into two main sections: 'Details' and 'Profile Picture'. The 'Details' section contains a form with the following fields: Title (dropdown menu), First Name (Sandra), Last Name (Employee), Middle/Other Names (empty), Passport Number (Pass12312), Email (employee@a.com), Cellular Number (012 312 3123), and Telephone Number (empty). An 'Update' button is located at the bottom of the form. The 'Profile Picture' section has a '+ Select Profile Picture' button and a placeholder image with an upload icon. Below the main form is a 'Change your Password' section with a red warning message: 'Password must be minimum of 8 characters and contain at least 1 capital letter, at least one numeric character, at least one special character, cannot be your first name or surname'. The left sidebar contains navigation options: Profile, Logout, Dashboard, User Resources, ARPL, and Support.

- 5. In the Profile page, you can make changes to your Details, Other Information, Profile Picture and Password.
- 6. Important: You must ensure that your Name(s) appear in the order as they appear in the RSA ID/Passport
- 7. Other Names must include all other names you have stated in the RSA ID/Passport
- 8. Where you make changes, please click on the Update button and if it is a password, on the Change Password

4. UPDATING COMPANY INFORMATION



The screenshot shows the CATHSSETA user interface. On the left is a navigation menu with options like Profile, Logout, Dashboard, SDF, Company Management, and various application types. The main content area is titled 'Available Companies' and contains a table with the following data:

Company Name	Entity ID	Email	Status	Size of Company	Levy Paying	Locked/Unlocked
KIP	iE L26	Testingemail@a.com	Active	Medium (50 - 149)	✓	🔒
N	L30	Arts@a.com	Active	Medium (50 - 149)	✓	🔒
BI	L53	shno@a.com	Pending Registration	Medium (50 - 149)	✓	🔒

Below the table is a pagination control: Page (4 of 4) with navigation arrows and a dropdown menu set to 5.

The second part of the screenshot shows the 'SOCIETY OF ARTS Details' form. It includes a note: 'In order to make any changes, you will have to unlock the table using the button on the right.' Below this are several tabs: Entity Details (selected), Entity Contacts, Entity Employees, SDF Management, Banking Details, Document Uploads, Training Committee, Sites, MOA Details, and Mentor Management. Under the 'Entity Details' tab, there are sub-sections: Workplace Approval Details, Employee Summary, Financial Statement, and Historical MG Data. The form fields show: Company Name * SOCIETY OF ARTS and Trading Name * L SOCIETY OF ARTS. An 'Unlock Company Details' button is visible on the right side of the form.

9. Once your profile has been approved, you will have access to Company Management menu item where can update some fields
10. You may also add a New Company
11. To update, highlight the Company. Once highlighted the row will turn green and open the section of the company profile that can be updated
12. Click Unlock Company details to make changes

4. UPDATING COMPANY INFORMATION



13. To make changes, navigate through the various tabs

14. Any changes made here will put the company into a 'Awaiting CATHSSETA Approval' status