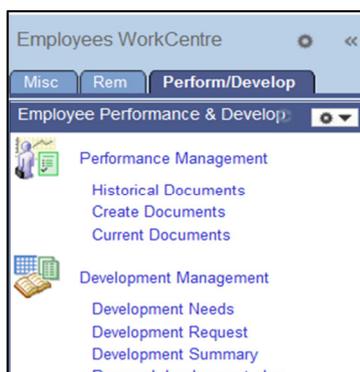


All staff: Steps to enter individual development needs on the PS Learning Management System

- Log into the UP portal (www.up.ac.za). (If you experience problems with the login, please contact the IT Help desk at Tel: 012 420-3051, email: help@it.up.ac.za).
- The UP Staff Intranet news page will appear. Click on the **Staff Systems Portlet** button.
- Scroll to the **Human Capital Management (HCM) System** portlet and click on **Self service for Personnel (Leave, claims, personal info etc.) HCM Home page**.
- The login screen will appear. Enter your portal password and click on **Sign In**.
- Click on the **Employees WorkCentre** link.
- Click on the **Perform/Develop** tab.



- Click on **Development Needs** (Development needs must be entered on the system before a Development Request can be entered).
- The following screen will appear:



- **Click on: Add Development Needs.** New development needs can be added and existing development needs edited. To add a new need, click on the **Add New Note** button. To edit or access the details of an existing development need, click on the need's subject.
- The following screen will appear:



- Enter a short description of your **development need** in the **detail-line**
- Enter the reason for this development need in the **Note Text-line**.
- **Correlate** each development need (described above) with the applicable learning **Strategy** (in other words the preferred type of learning programme/intervention to address the need) and select one of the following strategies:

Learning strategy	Notes
Conference/Seminar	Since such development needs hold financial implications for the University (or from own development funds), all extraneous costs must be submitted for approval. The total cost/partially funded application must be approved by line management. Academic staff can only apply if they don't have or development funds are depleted.
External short courses	If a development need cannot be addressed internally (In-house programmes), staff members may apply for financial assistance to attend programmes provided by external training providers. Since such development needs hold financial implications for the University, applications must be submitted to line management for approval. If the funding request is above R15 000, the request will after approval of direct line management, forwarded to the HRDC for approval and financial assistance.
Formal study at UP	Staff members qualify in accordance with University policy (fringe benefit policy) to pay a marginal levy (determined annually per appointment status, i.e. permanent full time, permanent part time etc.) in respect of tuition fees at the University of Pretoria. Payment of a marginal levy is only applicable to studies forming part of the curriculum of a formal qualification (degree or diploma) offered at the University. Details regarding the various formal programmes and subject courses, as well as the admission requirements, can be obtained from the Client Service Centre or the Academic Administration Section of the Faculty concerned. Take note: Approval must be sought (direct line management and HR) to attend classes during working hours. Such approval is not managed currently on PeopleSoft, therefore, the applicant must contact the Human Resources Business Partner to facilitate approval. The Gordon Institute of Business Science (GIBS) is a separate independent legal entity and an application to study a degree programme offered by GIBS is regarded as studies at another institution (Learning strategy: Study outside UP).
Formal study outside UP	In highly exceptional cases, a study grant (determined annually) would be considered for full time staff members to study (formal education) at another tertiary institution. Approvals for funding formal education programmes are subject to the following: Academic staff members, the aspired-for qualification is not the field of specialisation within the University of Pretoria and could best be acquired at another institution of Higher Education (motivated by line management). Support staff members, it is for the applicant not at all possible (in view of operational requirements) to undertake the formal study programme at UP. The line manager's motivation supports the applicant's envisaged programme. The outcome of the aspired-for qualification addresses the applicant's immediate job requirement (competencies required within the career path- often set as recommended qualification requirements in job descriptions) would be considered.
In-house courses free of charge, and In-house IT courses	UP In-house training programmes are the preferred training programmes for the different occupational categories of staff members at the University. The University's In-house training courses are presented via Continuing Education at UP (CE at UP) and Department of Information Technology (IT), User Support. These programmes are free of charge. Certain In-house programmes are compulsory (by law or in accordance with a decision taken by the Executive). In terms of the Human Resource Development Policy (Rt 501/02, of 30 April 2002, paragraph 3.6), however, in case of non-arrival at registered courses, the delegate will be liable to pay the full course fee.

- Click on the **Save** button.
- To edit or access the details of an existing **Development Need**, click on the **Need's** subject.

Once the above steps are completed you can request approval to attend an identified learning intervention

All staff: Steps to enter development requests

- Log into the UP portal (www.up.ac.za). (If you experience problems with the login, please contact the IT Help desk at Tel: 012 420-3051, email: help@it.up.ac.za).
- The UP Staff Intranet news page will appear. Click on the **Staff Systems Portlet** button.
- Scroll to the **Human Capital Management (HCM) System** portlet and click on **Self service for Personnel (Leave, claims, personal info etc.) HCM Home page**.
- The login screen will appear. Enter your portal password and click on **Sign In**.
- Click on the **Employees WorkCentre** link.
- Click on the **Perform/Develop** tab.



- Click on **Development Request**. You have previously entered your development needs and you have sought the programme (s), that you want attend. You now want to request approval and/or funding.
- The following screen will appear:

 A screenshot of the 'Development and training - Development request' form. It features a 'Development request' header, a 'Learning Strategy' dropdown menu, and a 'Strategy guidelines' button.

- Select the appropriate learning strategy to attend the programme that requires approval from line management:

Process: Free of charge In-house programmes (IT programmes and CE at UP)

- Click on **In-house (Free of Charge)** or **In-house IT programmes**. The following screen appears:

 A screenshot of the 'Request Training Enrollment' page. It displays the user's name 'Mrs EC Nagel' and instructions to choose a search method. The search options are: 'Search by Course Name', 'Search by Course Number', 'Search by Location', and 'Search by Date'.

- Click on **Search by Course Name**, type a name of course i.e. **clickUP** (or leave it blank) and click on the **Search** button.
- A list of all the selected (or all) courses will be displayed as follows:

 A screenshot of the 'Course Search' results page. It shows a table with columns for 'Course Name', 'Status', and 'Actions'. The table lists various courses, including 'clickUP' and 'clickUP (Free of Charge)'. The 'clickUP' course is highlighted.

- Click on **View Available Sessions** next to the course you would like to attend.

- Select the session you would like to attend by clicking on the **Session number**.
- On the **Request Training Enrolment – Session Detail** screen, read the applicable information and click on the **Continue** button.
- Complete the comments field if necessary and click on **Submit**. All your personal details will be captured automatically.

Process: Conference/seminar, external short courses and formal study at other universities

- Click on Conference/Seminar or External short courses or Formal study outside UP link. The following screen will appear:

- Complete all the required information, including the necessary motivation.
- **Note:**
 1. The programme cost refers to the cost shown in the original brochure.
 2. Transport, accommodation & subsistence costs should be included (if it will be claimed).
 3. The funding of formal study at other universities from central funds is restricted to the programme cost (capped amount (refer to Human Resources Development policy with regards to the amount that should be entered on the system)).
- It is important to attach the original brochure and quotation (browse facility). Click on the  to attach both documents. Please keep the original documents for financial payment purposes (you will be required to attach the approval (e-mail), which indicates the applicable cost centre to the invoice for payment purposes).
- Click on the **Apply** button to forward the request to the supervisor or the line manager.
- Once the apply button is clicked the agreement needs to be acknowledged. You will be required to tick in the appropriate tick box.

The Following step: Your line manager will receive an email: **Application for development need awaiting approval.**

- Your line manager will follow the link in the email to log into the system.
- The following screen will appear for the line manager:

Outstanding approvals					
List of transactions to be approved					
Training funds approval					
Approve/Disapprove development request					
View to Dis/Approve	Empl ID	Name	Course Start Date	Course End Date	Course Title
View to Dis/Approve	04456956	Miss L Dharamraj	2014/05/12	2014/05/14	Microsoft Visio

- The supervisor/line manager will **Approve** or **Disapprove** the request. Subsequently, you will receive an e-mail indicating the decision from your line manager.
- **Take note: The In-house courses are free of charge, however, the amount shown on the e-mail, will be paid as a penalty by the delegate if the course is not attended.** After approval by the line manager, the request for free of charge courses will be forwarded directly to IT or CE at UP for registration purposes. You will receive an e-mail confirmation.
- **For conference/seminar, external courses of funding of formal education at other universities, the request will be rerouted automatically (if approved by direct line management) to the next level of approval (dean/director/HRDC).** However, If the total cost are carried by “own” or departmental funds and approved by your direct line manager, the application will **only with regards to conference attendance routed to deans/directors (or the delegated nominees i.e. deputy dean).**
- If approved, you will receive the following e-mail (confirmation):

You are herewith notified that your development need ----- and funding has been approved.
 Programme costs: R29 400 (cost code.....)
 Transport costs: R0 or expl. R100 (cost code)
 Accommodation costs: R0 or expl. R100 (cost code)
 Subsistence cost : R0 or expl. R100 (cost code)
 Kindly enrol to attend the development initiative (facilitate original invoice for payment by financial officer) and complete the course evaluation on return.
 Please remember that it remains your responsibility to ensure the service provider is registered as a vendor, a purchase order is created and the payment is arranged with finance.

Please take note that you are required to attach the above e-mail confirmation to the original quotation to facilitate payment.

- After completion of the programme, you will receive an e-mail to evaluate the programme as follows:

>>> 24 March 2014 06:49 AM >>>

Please complete the program evaluation for the following completed program:

Course Title : Quest UP
Course start date : 2014-02-18
Course end date : 2014-02-18
Provider :

On the development summary screen, you will find the course mentioned above. Click on the actions button next to the course name and select Evaluate. The evaluation screen will open for you to complete.

Should this link not direct you to the development summary screen, please log-on to PeopleSoft HCM via the UML and navigate to Employees workcentre / Perform / Development Summary.

http://apphcmpr01.up.ac.za:7021/psp/pshcmpra/EMPLOYEE/HRMS/c/UP_ROLE_EMPLOYEE.UP_SS_TRAIN.GBL?Page=UP_SS_TRAINING&Action=U

- Follow the link in the email to log into the system (**Note: log onto portal prior to following the link**) and evaluate the programme.

Line managers: Approval of development requests of employees (within direct line of reporting)

The line manager (within the direct reporting line) receives an email: ***Application for development need awaiting approval.***

- The line manager follows the link in the email to log onto the system (**Note: log onto portal prior to following the link**). The following screen will appear:

Outstanding approvals					
List of transactions to be approved					
Training funds approval					
Approve/Disapprove development request					
View to Dis/Approve	Empl ID	Name	Course Start Date	Course End Date	Course Title
View to Dis/Approve	04456956	Miss L Dharamraj	2014/05/12	2014/05/14	Microsoft Visio

- The line manager clicks on **View to Dis/Approve** button.
- The following screen will appear:

Approve / Disapprove development requests	
Approval confirmation	
<p>▲ The following request will be approved. Please confirm</p>	
Approve/Disapprove training requests	
<p>Name: Miss L Dharamraj</p> <p>Course Title: Microsoft Visio</p> <p>Course Start Date: 2014/05/12</p> <p>Course End Date: 2014/05/14</p> <p>Training Reason:</p> <p>Learning Strategy: In-house IT programmes</p> <p>Select Development Need: <input type="text"/></p>	<p>Job Information HRDC budget</p> <p>Costs</p> <p>Programme costs: *****450.00</p> <p>Transport costs: *****0.00</p> <p>Accommodation costs: *****0.00</p> <p>Subsistence costs: *****0.00</p> <p>Total costs: *****450.00</p>
<p>Development team: <input type="text"/> Attach file: <input type="text"/></p> <p> <input type="button" value="Cancel"/> <input type="button" value="Approve"/> <input type="button" value="Disapprove"/> <input type="button" value="Return"/> </p>	
<p>Approve development request</p> <p>Development request: <input type="text"/></p> <p>HRDC Requesting within the amount: <input type="text"/></p>	

- Note:** Applications to approve In-house programmes (free of charge), will indicate the cost of the programme to be paid as a penalty if the course is not attended.
- Note:** Approval of funding applications (conference/workshop, external training, formal study outside UP (another university)) will indicate the total cost of the programme (including transport, accommodation etc.), however, the line manager is **required to select the cost centre**. The line manager could click on the available tabs to view the job information of the applicant or available HRDC funds. If development funds of the individual are the source of funding or departmental funds are available, the line manager could approve the application (enter cost centre), and the applicant will be informed to process payment via the financial administrator. However, if “own” funds or faculty/departmental funds are not available, the line manager would enter the required amount as a HRDC request. The application would then be channelled to the next level of approval (HRDC). If the amount requested is more than R15 000 or if it’s an application for formal study outside UP, the application will be approved by the HRDC and automatically forwarded to the central skills development committee (CDC). The applicant will be informed (e-mail) that the application was forwarded to the HRDC for approval.

Exclusively for Human Resources Development Committee (HRDC) and Central Development Committee (CDC) members: Approval of development funding requests

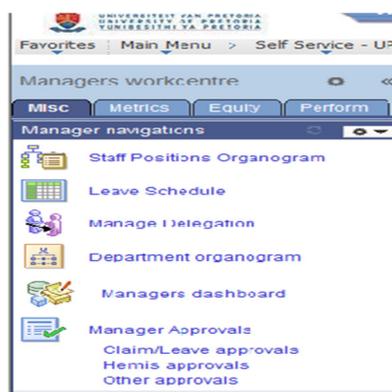
Background.

The members of an HRDC are nominated by the Dean of a faculty and Director of a support services department. The members of the CDC are nominated by the Skills Development Committee (statutory compliance). HRDC funds are annually earmarked to faculties and support departments from central skills development funds. HRDCs approve funding applications within the allocated budget. The PeopleSoft learning management system is currently not integrated with the PeopleSoft financial system, therefore, it remains the responsibility of the applicant to facilitate payment of approved funded interventions. Applications for formal education outside UP (other universities) and external training/development above R15000 would be forwarded to the CDC after approval by the respective HRDC.

The following process applies to the HRDC and the CDC:

Members of a HRDC (respective faculty or support department) receive an email: ***Application for development need awaiting approval.***

- Members of the HRDC/CDC follow the link in the email to log into the system (**Note: log onto portal prior to following the link**), or navigate to **Managers workcentre**
- *The following screen will appear:*



- Click on: **Other approvals icon**
- *The following screen will appear:*

Managers workcentre

Outstanding approvals

List of transactions to be approved

Training funds approval

Approve/Disapprove development request					
View to Dis/Approve	Empl ID	Name	Course Start Date	Course End Date	Course Title
View to Dis/Approve	04282744	Mrs P Appana	2014/05/12	2014/11/12	Management Development Program
View to Dis/Approve	04613300	Miss K Leggari	2014/05/26	2014/12/31	Course in HR Management

- Click on: **View to Dis/Approve**
- *The following screen will appear:*

Approval confirmation

The following request will be approved. Please confirm

Approve/Disapprove training requests

Name: Miss K Lekgari [Job Information](#) [HRDC budget](#)

Course Title: Course in HR Management

Course Start Date: 2014/05/26

Course End Date: 2014/12/31

Training Reason: Career Development

Learning Strategy: External Short Courses/Program

Select Development Need: Course in HR Management

Costs	
Programme costs:	*****29400.00
Transport costs:	*****0.00
Accommodation costs:	*****0.00
Subsistence costs:	*****0.00
Total costs	*****29400.00

Development funded from the following sources

Funds from HRDC	<input type="text" value="29400.00"/>	Account code	
Departmental funds	<input type="text"/>	Account code	
Individual's own/Donor funds	<input type="text"/>		
Personal funds	<input type="text"/>		
	<input type="text" value="29400.00"/>		

HRDC member's comments

Document type	Attached File	View
Original Course Brochure	HRM_Programme_3.pdf	View
Training Programme Quote	INV107685_HRM.pdf	View

Approve development request

Development requests: **Pending** [View/Hide Comments](#)

Development approvals

- HRDC members click on: **Approve, Disapprove or Refer back.**
Take note: The chair of the HRDC/CDC has final approval authority and committee members only have a reviewer status to comment on applications (in support of or why a certain application should not be funded/suggest refer back for more information).
- The chair of the HRDC/CDC click on: **Approve, Disapprove or Refer back.**
Take note: If the application was for external training/development above R15 000, the respective HRDC contributes R15 000. Formal education at other universities is funded from central funds, therefore no contribution is required from HRDC funds.
- If the funding application was approved, the applicant will receive an e-mail confirmation as follows:

You are herewith notified that your development need ----- and funding has been approved.
 Programme costs: R29 400 (cost code.....)
 Transport costs: R0 or for example R100 (cost code)
 Accommodation costs: R0 or for example R100 (cost code)
 Subsistence cost : R0 or for example R100 (cost code)
 Kindly enrol to attend the development initiative (facilitate original invoice for payment by financial officer) and complete the course evaluation on return.
 Please remember that it remains your responsibility to ensure the service provider is registered as a vendor, a purchase order is created and the payment is arranged with finance.