



Integrated Transport Information System

ITIS Desktop Project Information Module - User Manual

Jan 2022

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Revision History

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1	Update screenshots and software changes	K Niebuhr M Wilgenbus	May 2014
2	Registration update	M Wilgenbus	May 2014
3	Import details added	M Wilgenbus	Dec 2014
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1. Welcome

Welcome to ITIS Desktop Project Information (Info) Module - User Manual. This Manual contains information about the basic use of the ITIS Desktop software and the Project Info Module.

For information pertaining to the installation, system requirements and software prerequisites of the software, please refer to the ITIS Desktop Installation Manual.

2. Software Overview

This user manual discusses some of the basic concepts behind the ITIS Desktop software, such as how to start the software and capture maintenance data.

2.1. Starting the program

You can start the program in two ways:

1. Click on Start > All Programs > SANRAL > ITIS DeskTop> ITIS DeskTop; or
2. Double click on the ITIS DeskTop icon on your desktop.

2.2. Running the software for the first time

When running the software for the first time you must register the software. To register the software you need your username, password and software license code. For information on how to register and to obtain a software license please refer to the ITIS Desktop Installation Manual.

2.3. Using the software

The software consists of different modules. All available modules will appear in the module bar at the top of the screen. Below is a list of available modules:

- i. Administration
- ii. Contract Module
- iii. Incident Module
- iv. Project Info Module
- v. RRM Module
- vi. Structure Module

Only the Administration and Project Info Module will be discussed in the sections that follow. For more information about the Contract, Incident, RRM and Structure Module please refer to the relevant module user manual.

3. Administration

The Administration module consists of three main tabs:

- Registration Management
- User Management
- Product Management



Figure 1: Administration Module

3.1. Registration Details

On the Registration Management tab, you will see your organization registration details such as: Organization Name, Branch Name, Registration Date and who registered the software, License State and License Expiry Date.

3.2. Web Service Details

These are the settings used to connect to the SANRAL Web Service. During the first start up, the software will ask you to configure these settings before you can continue (please see 2.2 Running the software for the first time).

3.2.1. Changing the Web Service settings

The default web service address is <https://itis.nra.co.za> please do not change this unless given specific instructions.

3.3. User Management

Click on this tab to view your details. Please ensure that your details are correct, if you have any issues or require any assistance, then please create your issue on the Service Desk Website: <https://jira.nra.co.za:8443/servicedesk/> requesting your details to be updated.

3.3.1. How to register a new user

To register a new ITIS user, go to the ITIS website <https://itis.nra.co.za/portal>

- Click on Register and accept the Term and Conditions
- On the Registration Category page select Service Provider from the dropdown. Click on Next

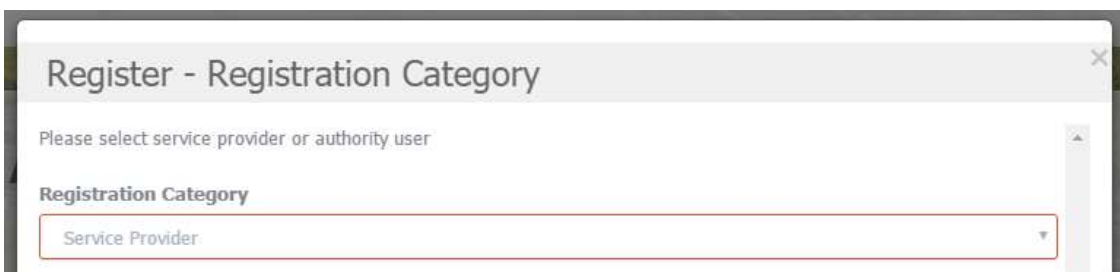
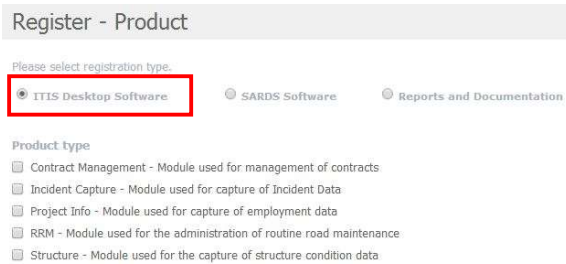


Figure 2: Registration Category

- iii. On the Product page select ITIS Desktop Software and RRM. Click on Next



Register - Product

Please select registration type:

☒ ITIS Desktop Software ☐ SARDS Software ☐ Reports and Documentation

Product type

☐ Contract Management - Module used for management of contracts

☐ Incident Capture - Module used for capture of Incident Data

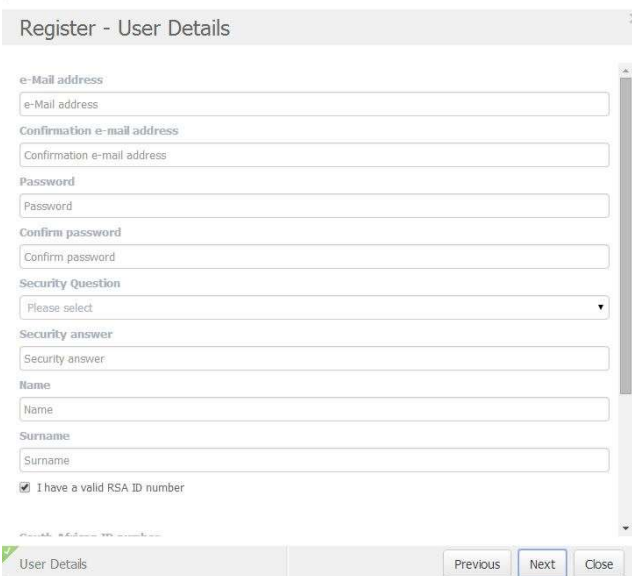
☐ Project Info - Module used for capture of employment data

☐ RRM - Module used for the administration of routine road maintenance

☐ Structure - Module used for the capture of structure condition data

Figure 3: Product Information

- iv. On the User Details Page enter the following details :



Register - User Details

e-Mail address

e-Mail address

Confirmation e-mail address

Confirmation e-mail address

Password

Password

Confirm password

Confirm password

Security Question

Please select

Security answer

Security answer

Name

Name

Surname

Surname

☒ I have a valid RSA ID number

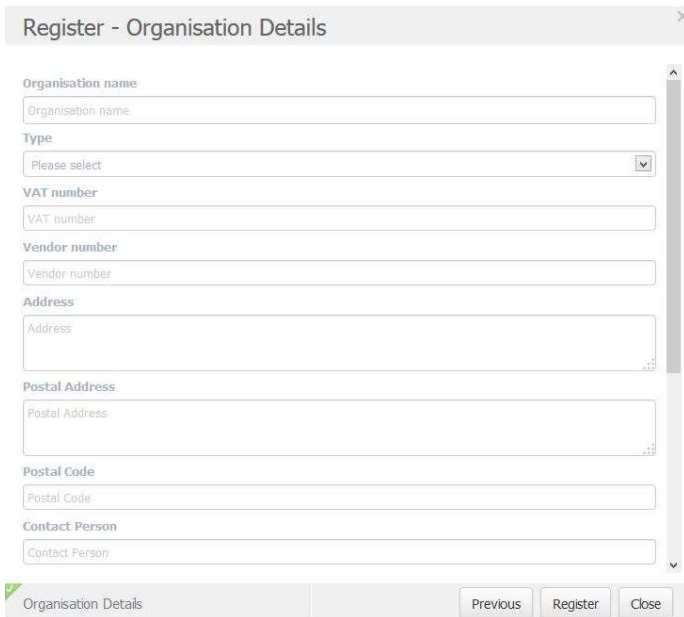
User Details Previous Next Close

Figure 4: User Details

- **E-Mail Address:** This email address will be used as your user name to access this website and the ITIS software. Each user must have their own email address and users will not be allowed to share an email address
- **Password:** This password will be required when trying to access the website and the ITIS software. The password must contain at least 1 UPPERCASE letter, 1 lowercase letter, 1 special character and 1 number
- **Security Question:** Select a security question from the dropdown. This question will be used for confirmation when resetting your password
- **Security Answer:** Enter the answer to the question selected above
- **Name:** Your name
- **Surname:** Your surname
- **RSA ID:** Your RSA ID number as per your green barcoded ID book or the new SmartIDcard. If you don't have an RSA ID number then deselect "I have a valid RSA ID number" above, this will allow you to enter your passport number
- **Telephone Number:** Your telephone number at the office
- **Mobile Number:** Your mobile number
- **Fax Number:** Your Fax number

- v. Click on Next

- vi. On the next page, you need to upload a photo of yourself and a copy of your ID.
- Photo specifications:
 - a. Recent photo not older than 6 months
 - b. The photo must be a close-up of your head and top of your shoulders so that your face takes up 70 – 80% of the photo
 - c. Colour photo of high quality with no special effects
 - d. Show you looking directly at the camera
 - e. The photo must have appropriate brightness and contrast and
 - f. Size: Not bigger than 1MB
 - g. Format: jpeg
 - ID specifications:
 - a. Size: Not bigger than 2MB
 - b. Format: jpeg, pdf, doc, docx
- vii. On the User Handset Questionnaire select your handset and handset software from the dropdowns. This info is used to evaluate handset compatibility with ITIS Mobile capture.
- viii. On the Organization Details Page enter the following details:



The screenshot shows a web form titled "Register - Organisation Details". It includes the following fields: "Organisation name" (text input), "Type" (dropdown menu with "Please select"), "VAT number" (text input), "Vendor number" (text input), "Address" (text input), "Postal Address" (text input), "Postal Code" (text input), and "Contact Person" (text input). At the bottom of the form are three buttons: "Previous", "Register", and "Close".

Figure 5: Organization Details

- **Organization Name:** This is the name of the organization you are working for. When you start typing the organization name and it already exists on our system, it will appear below the input field. Click on the name using your mouse to select it
- **Type:** Select the correct Organization type from the dropdown
- **VAT Number:** Capture your organization's VAT number
- **Vendor Number:** Capture your organization's vendor number
- **Address:** Capture your organization's physical address
- **Postal Address and Code:** Capture your organization's postal address and code
- **Contract Person:** Name of the main contact person at your organization
- **Telephone number:** The contact person's telephone number
- **Mobile number:** The contact person's mobile number

- **Fax number:** The contact person's fax number
 - **Captcha:** Enter the characters as seen in the image on screen. The captcha is case sensitive
- ix. Click on Register
 - x. Clicking on Submit will send a verification email to the email address you specified. Open the email and click on the email verification link.

ITIS : User Account

New account

A request for access to <http://itisqa.nra.co.za/Portal/> was made:

User: Kallie Niebuhr

Organization: SANRAL

Product/s:

- Incident Capture - Module used for capture of Incident Data
- Project Info - Module used for capture of employment data
- RRM - Module used for the administration of routine road maintenance

[Click here](#) to verify your e-mail address.

Thanks,
The ITIS team

Figure 6: Verification Email

- xi. Once done your request will be forwarded to SANRAL for approval. You will receive an email with results of your request.

3.4. Product Management

On the Product Management tab, you will see more detail on all the installed modules, as well as available updates for each module.

3.4.1. Available Products

Depending on your permissions and the software license used you will see some or all of the following products:

- ITIS Desktop - This is the Administration Module used for managing the software
- Contract Module - Module used for management of contracts
- Incident Module - Module used for capture of incident data
- Project Info Module - Module used for capturing of project and employment data
- RRM Module - Module used for administration of routine route maintenance
- Structure Module - Module used for capturing of structure condition data

NOTE: If you are missing a product, then please create your issue on the Service Desk Website: <https://jira.nra.co.za:8443/servicedesk/> with your software license ID used, requesting your license to be updated. You will find this license ID on the registration management tab.

3.4.2. Software Update

- i. To update your software simply click on *Synchronize and Check for Updates*.
- ii. If there is an update available for download click on Yes.
- iii. If you are using Windows XP the software will prompt you to select the user account you want to use to run this program. Select Current user and deselect "Protect my computer and data from unauthorized program activity". Click on Ok
- iv. After the update process is complete your software will restart and you can continue using the software.

NOTE: If your software update fails with a message indicating you are required to run the software as administrator, please exit the software, right click on the shortcut and select the option *Run as Administrator*.

4. Data field types

There are several different types of fields used to capture data. Please read the following section on how to use each control type correctly:

4.1. Text Box

Text-boxes are where you simply type your value in. Please enter data that is suitable to the field label.

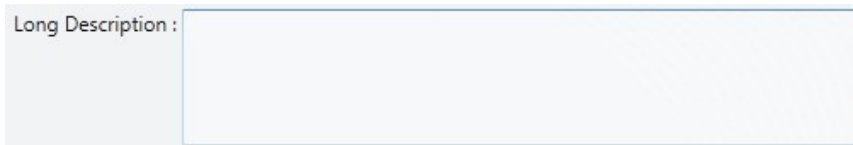


Figure 7: Text Box

4.2. Dropdown List

Drop-down lists are where a downward facing arrow on the right of the control allows you to show a list of values of which only one can be selected.

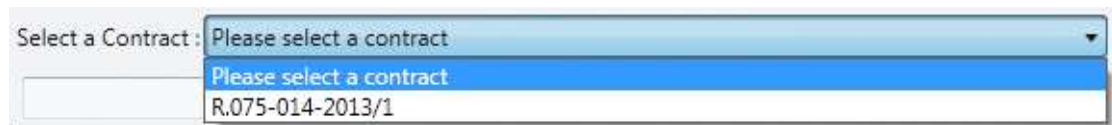


Figure 8: Dropdown

4.3. Check Box

Check-box groups allow you to quickly select the relevant values by checking them.

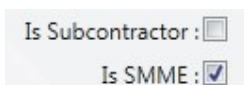


Figure 9: Check Box

4.4. Calendar

For date fields click on the calendar and select the required date. To select a date like 1 Jan 2005 click on the calendar > Click on the month's name at the top (this will show you all the months for that year) > Click on the year at the top (this will show you all the years) > Select the year > Select the month > Select the day.

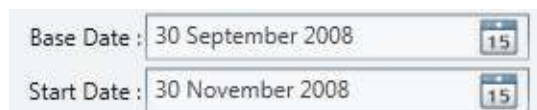


Figure 10: Date

5. Project Information (PIM) Module

The PIM module is used to capture all project related data like estimates, expenditure, employment and training data.

Once you have started the program and click on the PIM Module the screen displayed below will appear. Please note the numerical markings made for reference purposes, will not be visible in the application.

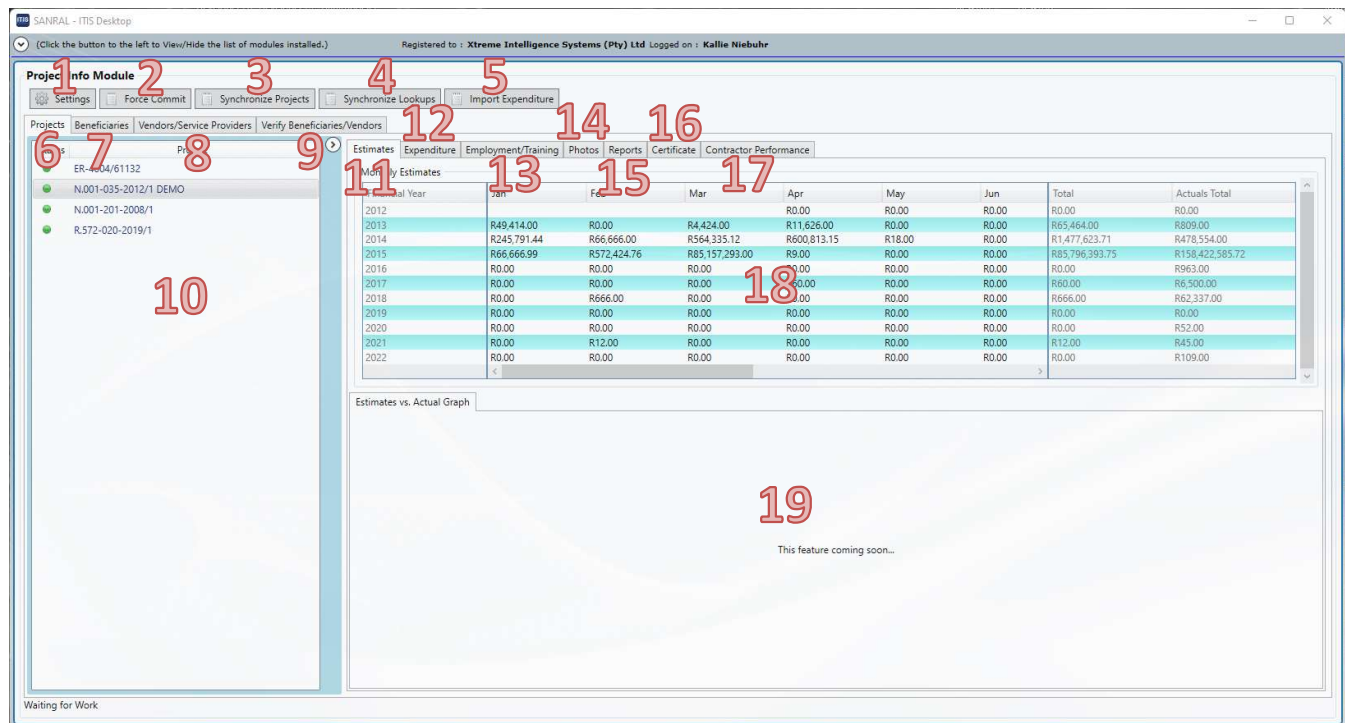


Figure 11: PIM Module

- Settings:** Click this button to change the polling interval. The software uses this polling interval for background synchronization. The current version of the software however does not synchronize any information automatically. All the data must be synchronized manually.
- Force Commit:** Click this button to save your local uncommitted changes to the SANRAL server. This action will only save your changes and will not save the changes on the server to your machine.
- Synchronize Projects:** Click this button to synchronize your local data with the SANRAL server. This will add new projects and remove old projects, will also update all captured project data.
- Synchronize Lookups:** Click this button to synchronize all the lookups. Lookups are used in dropdowns.
- Import Expenditure:** Click this button to import project expenditure. Expenditure can either be imported or info can be captured on the Expenditure tab (See Figure 11: No 11).
- Projects:** Click on this tab to capture project data, like estimates, expenditure, employment and training and other project related data.
- Beneficiaries:** Click on this tab to capture beneficiary information.
- Vendors/Service Providers:** Click on this tab to capture vendor/service provider information.
- Verify Beneficiary/Vendor:** Click on this tab to verify beneficiary and vendor information. This tab is only accessible by a user with the correct role/permission.
- Project List:** After synchronizing projects, all projects you have access to will appear on the project list.
- Estimates:** Click on this tab to capture the selected projects estimates.
- Expenditure:** Click on this tab to capture the selected projects expenditure.

- 13. Employment/Training:** Click on this tab to capture the selected projects employment and training information.
- 14. Photo:** Click on this tab to upload project photos for the selected project
- 15. Reports:** Click on this tab to download and view project reports.
- 16. Certificate:** This tab is not available yet but will be used for the CPG calculations and certificate.
- 17. Contractor Performance:** Use this tab to capture the contractor's performance review.
- 18. Month/Year Grid:** Use this grid to select the applicable month for the relevant year, to capture estimates, expenditure, employment and training data.
- 19. Data Window:** PIM data capture forms.

6. Synchronize & Commit

6.1. Synchronize Lookups

Click on this button to synchronise your data lookups, should any lookup values have changed then this will fetch the latest values from the server (See Figure 11: No 4).

6.2. Synchronize Projects

Click this button to synchronize your local data with the SANRAL server. This will add new projects and remove old projects, will also update all captured project data (See Figure 11: No 3).

6.3. Force Commit

Click on this button to submit your data to the Server. Force commit will only save your changes to the SANRAL server, it will not save changes from the server to your local machine (See Figure 11: No 2).

7. Projects

Under the project tab you can capture related project data, each project to which you have access to will be listed below. By clicking on a project, you select it and the data capture tabs will appear for that project on the right.

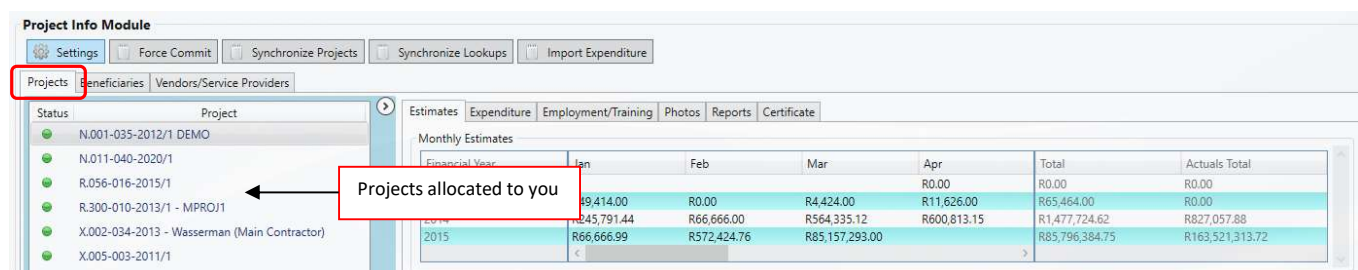


Figure 12: Projects Tab

7.1. Project data status indicators



Project item with no local changes



Project item with local uncommitted changes



Project item in conflict. Please contact support at <https://jira.nra.co.za:8443/servicedesk/> to resolve the conflict.

7.2. Project Estimates

7.2.1. Add Estimates

- i. To capture an Estimate, click on the relevant project on the left, then click on the Estimates tab on the right

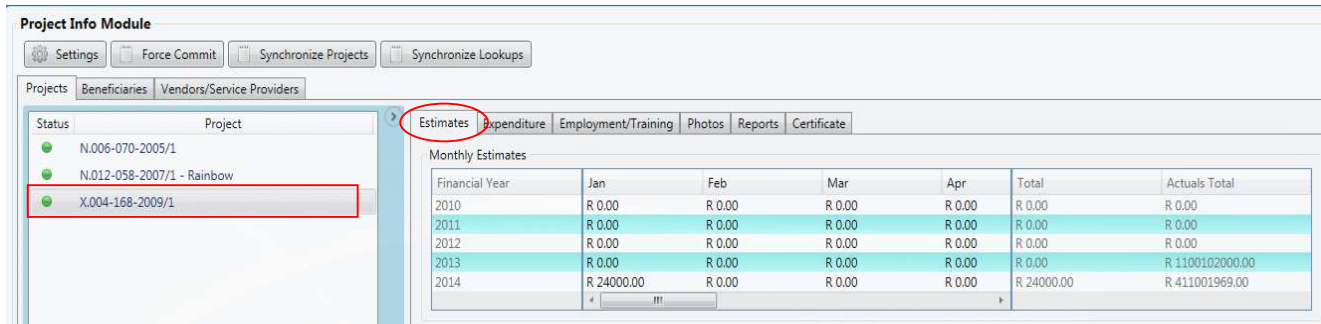


Figure 13: Project Estimates

SELF HELP: Don't see the project on the project list, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

- ii. Click on the month for the correct year

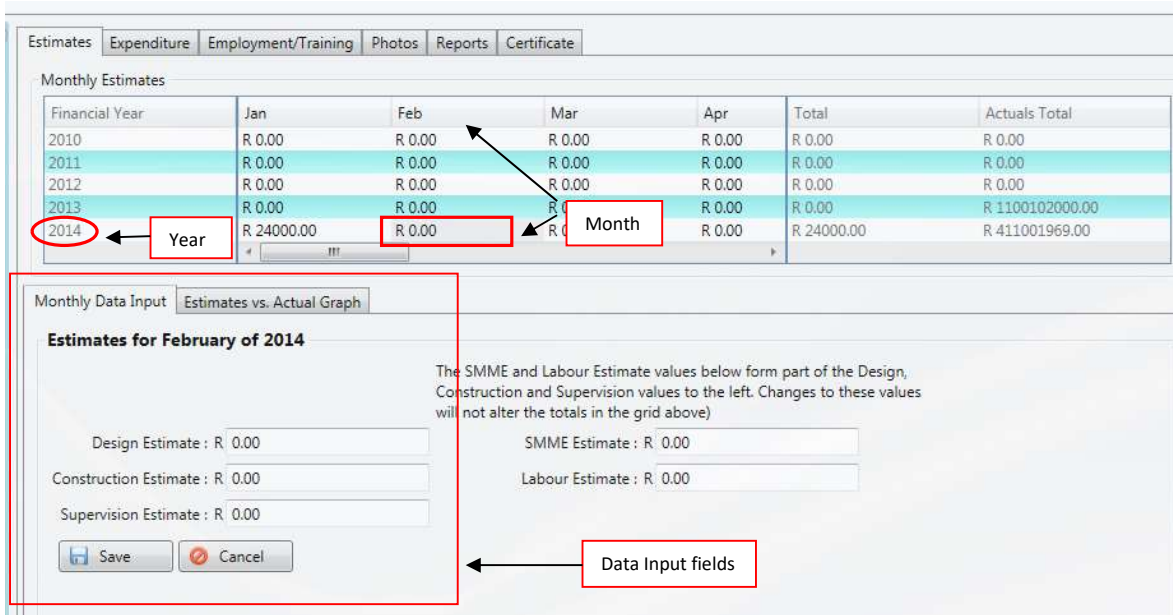


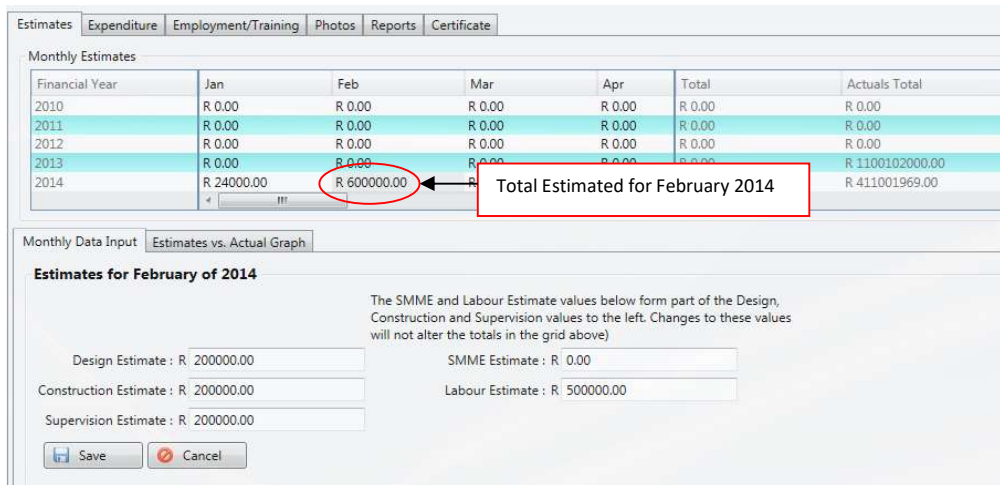
Figure 14: Capture / Edit Estimates

SELF HELP: Don't see the see the month for the year you are looking for, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project months
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

- iii. Once you have selected the, you will see the Data Input fields are visible at the bottom of your screen (See Figure 14)
- iv. Capture the relevant figures excluding VAT and click on Save or Cancel to revert

- v. Once you click on Save, the total Estimates will be calculated and displayed for February in the grid above for the relevant cell:



Financial Year	Jan	Feb	Mar	Apr	Total	Actuals Total
2010	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2011	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2012	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2013	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 1100102000.00
2014	R 24000.00	R 600000.00	R 0.00	R 0.00	R 624000.00	R 411001969.00

Estimates for February of 2014

The SMME and Labour Estimate values below form part of the Design, Construction and Supervision values to the left. Changes to these values will not alter the totals in the grid above)

Design Estimate : R 200000.00
 Construction Estimate : R 200000.00
 Supervision Estimate : R 200000.00
 SMME Estimate : R 0.00
 Labour Estimate : R 500000.00

Figure 15: Captured Estimate

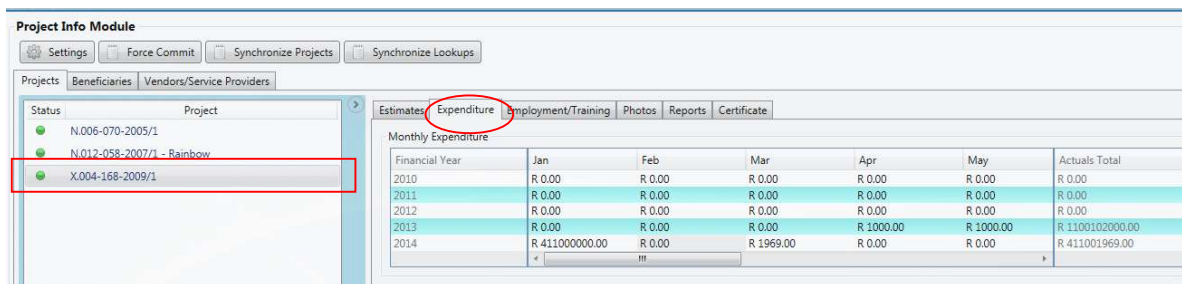
7.2.2. Edit Estimates

- To edit an Estimate, click on the relevant project on the left, then click on the Estimates tab (See Figure 13)
- Click on month for the correct year (See Figure 14)
- Make the require changes and click on Save or Cancel to revert

7.3. Project Expenditure

7.3.1. Add Expenditure

- To capture Expenditure, click on the relevant Project on the left and click on the Expenditure tab on the right:



Financial Year	Jan	Feb	Mar	Apr	May	Actuals Total
2010	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2011	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2012	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2013	R 0.00	R 0.00	R 0.00	R 1000.00	R 1000.00	R 1100102000.00
2014	R 411000000.00	R 0.00	R 1969.00	R 0.00	R 0.00	R 411001969.00

Estimates for February of 2014

The SMME and Labour Estimate values below form part of the Design, Construction and Supervision values to the left. Changes to these values will not alter the totals in the grid above)

Design Estimate : R 200000.00
 Construction Estimate : R 200000.00
 Supervision Estimate : R 200000.00
 SMME Estimate : R 0.00
 Labour Estimate : R 500000.00

Figure 16: Project Expenditure

SELF HELP: Don't see the project on the project list, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

ii. Click on the month for the correct year:

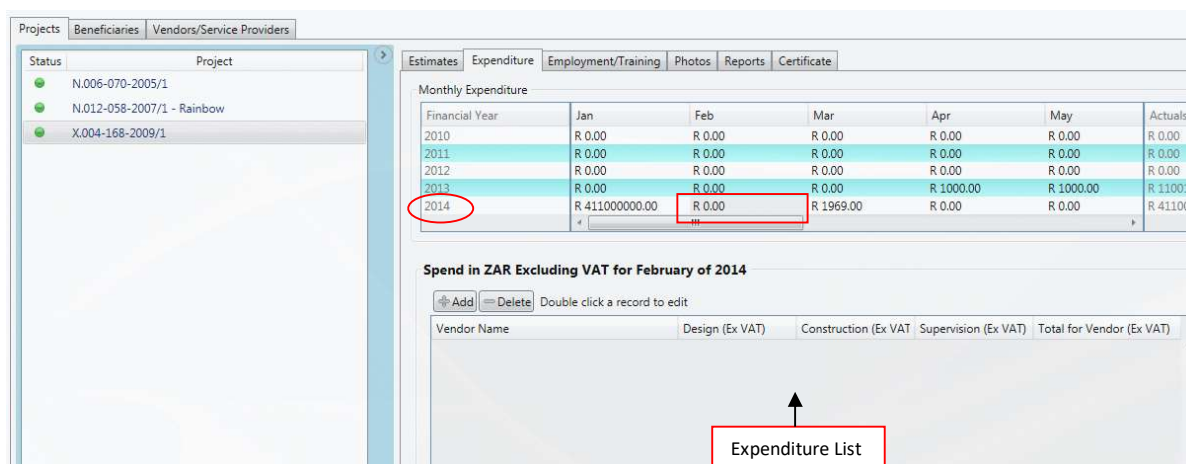



Figure 17: Project Month

iii. Click on the  button. You should see the following screen:

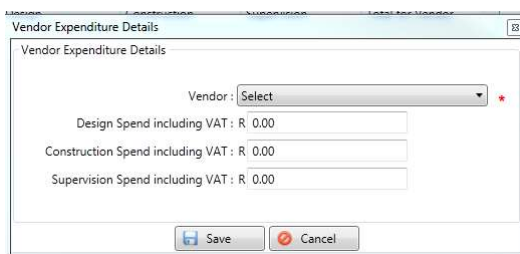


Figure 18: Add Project Expenditure

iv. Select the Vendor from the Dropdown list by clicking on the  button.

SELF HELP: Don't see your vendor on the dropdown, then check the following:

- Synchronize your lookups (Figure 11 No 4)
- Ensure the vendor exists and is linked to you project (See 9. Vendors)

SELF HELP: The vendor is on the dropdown, but is written in red, then check the following:

- The vendor has validation errors and errors must be fixed before the vendor can be used
- Edit vendor and synchronize lookups (See 9. Vendors)

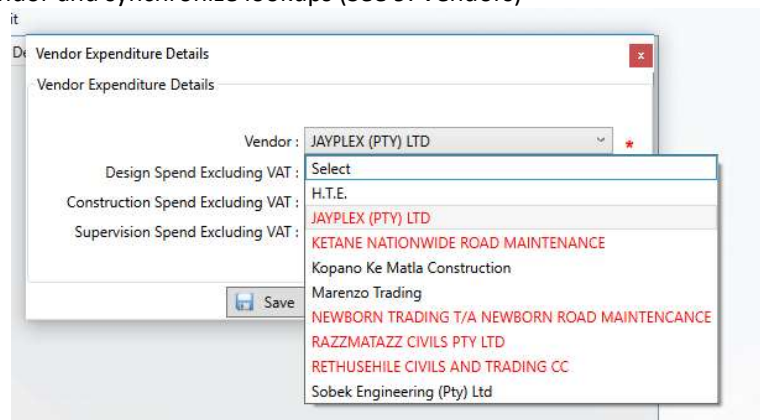
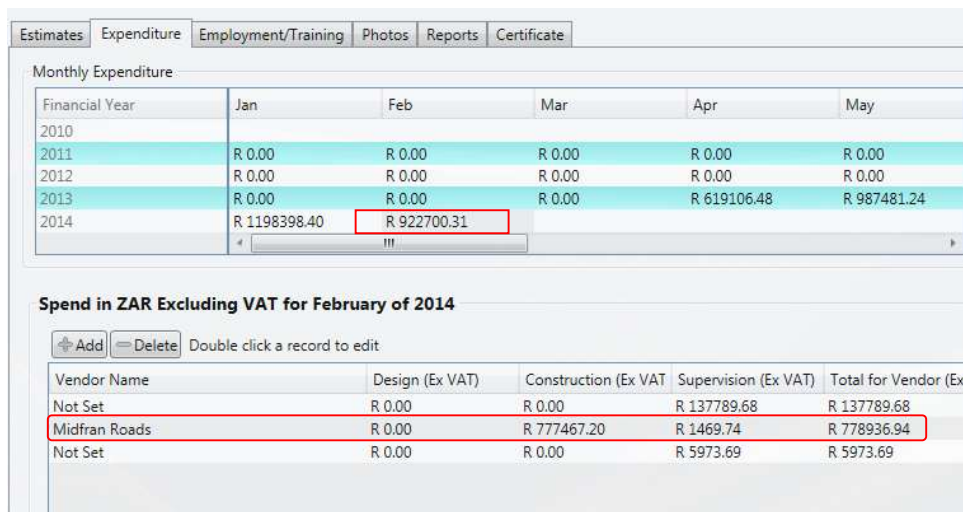


Figure 19: Vendor with validation errors

- v. Add your figures excluding VAT to the remaining 3 fields and click on Save
- vi. Once you have clicked on Save the figures will be calculated and the total Expenditure for February will be displayed in the *February* field:



Monthly Expenditure

Financial Year	Jan	Feb	Mar	Apr	May
2010					
2011	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2012	R 0.00	R 0.00	R 0.00	R 0.00	R 0.00
2013	R 0.00	R 0.00	R 0.00	R 619106.48	R 987481.24
2014	R 1198398.40	R 922700.31			

Spend in ZAR Excluding VAT for February of 2014

Double click a record to edit

Vendor Name	Design (Ex VAT)	Construction (Ex VAT)	Supervision (Ex VAT)	Total for Vendor (Ex VAT)
Not Set	R 0.00	R 0.00	R 137789.68	R 137789.68
Midfran Roads	R 0.00	R 777467.20	R 1469.74	R 778936.94
Not Set	R 0.00	R 0.00	R 5973.69	R 5973.69

Figure 20: Captured Expenditure

7.3.2. Edit Expenditure

- i. To edit Expenditure, click on the relevant project on the left, then click on the Expenditure tab (See Figure 13)
- ii. Click on month for the correct year (See Figure 14)
- iii. Double click on the expenditure record you wish to edit.
- iv. Make the require changes and click on Save or Cancel to revert

7.3.3. Import Expenditure

To do a bulk upload of expenditure click on Import Expenditure (See Figure 11 No 5). The Import wizard will now open with instructions on how to create your import file:

Expenditure Import Wizard

Step 1 : Select Import File

Instructions : Please read carefully.

- General Import Information**

What follows are guidelines for creating files to be used to import data into ITIS products. Some detail is provided on how such files are required to be structured and how they are typically processed. The aim is to provide the necessary information for import file creation as well as to assist in trouble shooting import problems.

All imports, unless specifically otherwise stated, are performed from text files. These files are what are called CSV or "Comma Separated Value" files.

a. **What is a CSV file?**

A CSV file is a text file that has data entered by the user in either a text editor or some form of computer system that has functionality available to export existing data from some source into the file.

CSV files to be used for importing data should consist of lines of data representing a row or record. Each line should be terminated with CR (Carriage Return – ASCII (13)) followed character, immediately by a LF (Line Feed – ASCII(10)) character. This specific combination of characters is used to indicate the end of a record to the software processing the import text file. This combination of characters is often

Select a file to import : ...

Select the relevant delimiter :

<< Back Next >> Cancel

The information is also displayed below for your convenience:

a. General Import Information

What follows are guidelines for creating files to be used to import data into ITIS products. Some detail is provided on how such files are required to be structured and how they are typically processed. The aim is to provide the necessary information for import file creation as well as to assist in trouble shooting import problems.

All imports, unless specifically otherwise stated, are performed from text files. These files are what are called CSV or "Comma Separated Value" files.


b. What is a CSV file?

A CSV file is a text file that has data entered by the user in either a text editor or some form of computer system that has functionality available to export existing data from some source into the file.

CSV files to be used for importing data should consist of lines of data representing a row or record. Each line should be terminated with CR (Carriage Return – ASCII (13)) followed character, immediately by a LF (Line Feed – ASCII(10)) character. This specific combination of characters is used to indicate the end of a record to the software processing the import text file. This combination of characters is often referred to as the End of Line Delimiter.

Within each row, each value for each column, is then separated by another delimiter. Although the name CSV suggests the use of the Comma (ASCII(49)) character, often importers support the use of other delimiters such as the Semi-colon (ASCII(59)) and pipe (Also known as Vertical Bar – ASCII(124)). These delimiters are used by the software processing the import to distinguish between columns of the row of data.

An important thing to remember is that the line MUST end with the End of Line delimiter. If your file contains a column delimiter immediately before the End of Line delimiter, the import functionality will assume there is an empty column of data there. This is fine if the empty column was supposed to be there, but if it was not, the importer might fail because of that "extra" column that now exists.

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c. File Layout Rules

Over and above the general discussion above, there are other rules applicable when considering how to format your text file for successful import.

Some import facilities in IT IS support column headers. This is where the first row in the import file is the name of the column. This allows the software processing the import text file to determine the order in which columns are present. In addition, this might allow in some cases the importing functionality to allow of the omission or addition of columns. But this is implementation specific.

Other facilities do not support column headers. In these cases, it will be essential to include ALL required columns and to include them in the order specified by the documentation for the implementation. If this is not done, the import functionality has no accurate information as what data is in what column and catastrophic failure is virtually inevitable.

Of course, omission of entire rows simply results in that row not being imported.

d. A Word or Two on Delimiters

What will be discussed here specifically revolves around COLUMN delimiters.

Firstly, we will handle columns that have no data. The answer here is quite simple if the documentation for the implementation specifies that the column “can be null”, “can be empty”, “not required” or “nullable”, the data in that column does not have to be populated. This might occur, for example, in the case of where a person perhaps does not possess a cellular telephone. Information about that person stored in the database would then have to accommodate the field being empty or not containing a value of being “null”.

So how do we specify this in the file? We simply place nothing in between the column delimiters. For example, if a line looked like this:

John Smith,Townhouse 13 23 Rio Road,Centurion,0157,,CRLF

In the example above, the 5th and last columns contain “null” data.

Secondly it is important to note that delimiters should not exist in fields in any line of data. This could cause the import functionality to discover an additional column. For example, the following row would indicate 5 columns to the importing functionality:

John Smith,Townhouse 13 23 Rio Road,Centurion,0157,01233344,07275555CRLF

If the line read as follows, the importer would detect 5 columns (note the comma in the address field between “Townhouse 13” and “23 Rio Road”):

John Smith,Townhouse 13, 23 Rio Road,Centurion,0157,01233344,07275555CRLF

Some import functionality might be more tolerant of this circumstance and some import functionality might use alternative delimiters in attempt to minimize this risk. But the documentation for each importer implementation will provide more accurate information.

e. Expenditure Import Rules

Now we get on to the specifics for importing Beneficiaries into the Project Information Module/s of IT IS.

The importer does NOT support column headers. All columns must be in place and the order as dictated in this document must be adhered to, to ensure the successful importing of data.

The importer supports alternative delimiters through the user interfaces but defaults to the use of the semi-colon as column delimiter.

End Of Line delimiter is the CRLF combination (ASCII(13) followed immediately by ASCII(10)).

The supports the use of start and end quotations of text fields. If quotes are in place they will be removed from the contents of the data record.

f. Expenditure Import Fields

Field Name	Data Type	Scale or Precision	Required	Lookup or format
Company registration no	Character	13	Required	
Project No	Character	30	Required	
Project month	Character	6	Required	MM-YYYY
Design	Number	10,2	Required	
Supervision	Number	10,2	Required	
Construction	Number	10,2	Required	

g. Record sample

A single record has no spaces between field delimiters and ends with the two characters Carriage return (CR) and Line Feed (LF). Below is a record sample and the table following it provides the data values represented by the record.

CK1922/120000/23;R.061-024-2010/1;04-2013;3000.00;0;0 (CR) (LF)
CK1922/120000/23;R.061-024-2010/1;05-2013;0;0;15000.00 (CR) (LF)

Sample Record 1 Value Table

Field Name	Data Value
Company registration no	7701015150086
Project No	R.061-024-2010/1
Training Month	April 2013
Design	R 3000.00
Supervision	R 0.00
Construction	R 0.00

Sample Record 2 Value Table

Field Name	Data Value
Company registration no	7701015150086
Project No	R.061-024-2010/1
Training Month	May 2013
Design	R 0.00
Supervision	R 0.00
Construction	R 15000.00

7.4. Project Employment Data

7.4.1. Add Employment Data

- Information is captured per Beneficiary.
- To capture Employment / Expenditure click on the relevant project on the left and click on the Employment/Training tab in the right:



Figure 21: Employment and Training

SELF HELP: Don't see the project on the project list, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct then please send an email to itisissues@nra.co.za with the relevant project number

- Click on the month for the correct year:

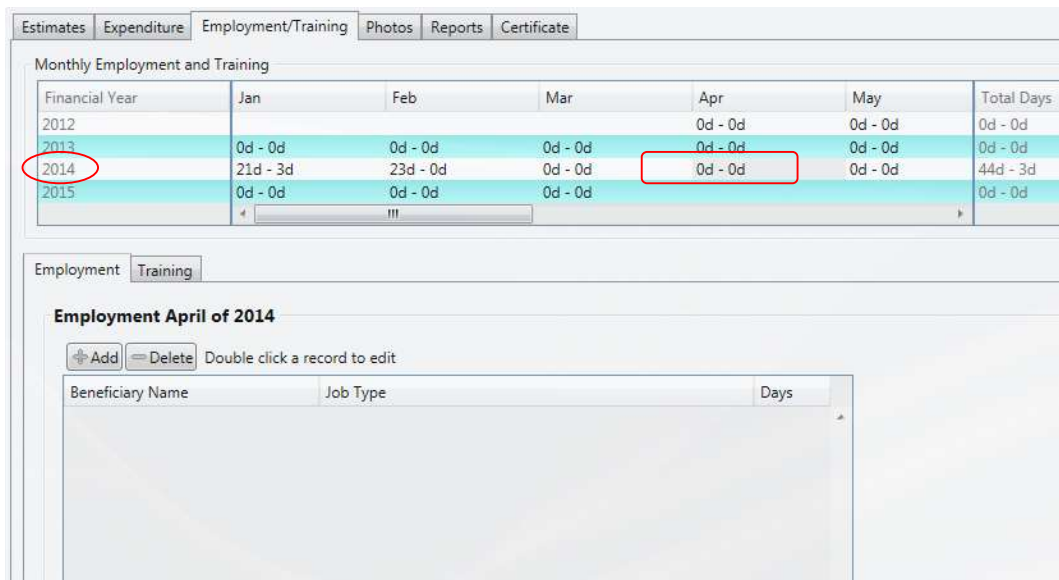


Figure 22: Project month


- Select either the Employment tab:
- Click on the  button. The following screen will pop up

Figure 23: Add Employment screen

- vi. Select the Beneficiary from the Dropdown list

SELF HELP: Don't see your beneficiary on the dropdown, then check the following:

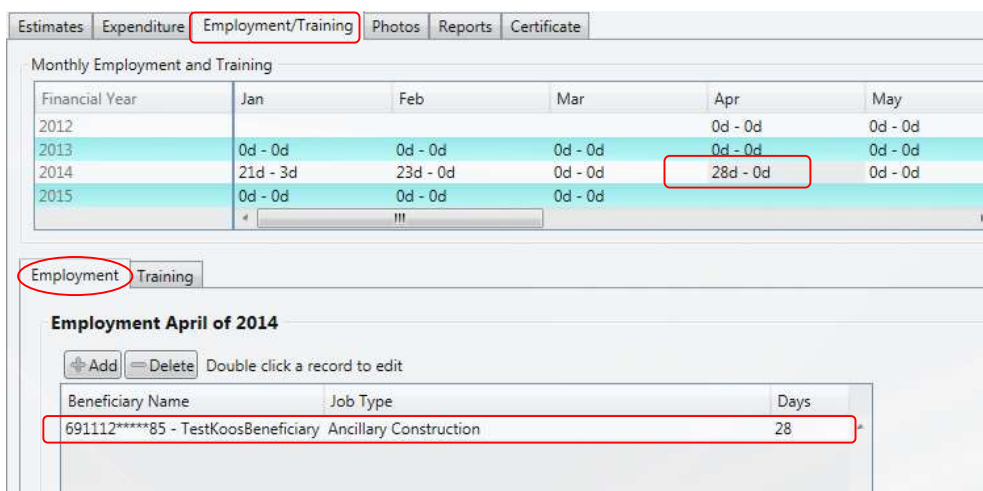
- Synchronize your lookups (Figure 11 No 4)
- Ensure the beneficiary exists and is linked to you project (See 8. Beneficiary)

SELF HELP: The beneficiary is on the dropdown, but is written in red, then check the following:

- The beneficiary has validation errors and errors must be fixed before the beneficiary can be used
- Edit beneficiary and synchronize lookups (See 8. Beneficiary)

Figure 24: Beneficiary with validation errors

- vii. Select the Job Type from the Dropdown list
- viii. Select the days that the beneficiary worked on the calendar, or make use of the toggle select all working days or deselect all working days and make further changes
- ix. Capture the total actual hours worked for the month
- x. Capture the gross salary/wage paid for the hours worked.
- xi. Click on Save
- xii. Once you have clicked on Save, the Wages will be visible in the *Employment* Tab:



Financial Year	Jan	Feb	Mar	Apr	May
2012				0d - 0d	0d - 0d
2013	0d - 0d	0d - 0d	0d - 0d	0d - 0d	0d - 0d
2014	21d - 3d	23d - 0d	0d - 0d	28d - 0d	0d - 0d
2015	0d - 0d	0d - 0d	0d - 0d		

Beneficiary Name	Job Type	Days
691112****85 - TestKoosBeneficiary	Ancillary Construction	28

Figure 25: Captured Employment data

- xiii. More Employment details can be captured by clicking on the *Add* button.

7.4.2. Edit Employment Data

- To edit employment data, click on the relevant project on the left, then click on the Employment/Training tab (See Figure 13)
- Click on month for the correct year (See Figure 14)
- Double click on the employment data record you wish to edit.
- Make the require changes and click on Save or Cancel to revert

NOTE: For security reasons only the person that added the record can edit the record.

7.5. Project Training Data

7.5.1. Add Training Data

- Click on the Training Tab
- Click on the Add Button. The following screen will pop up

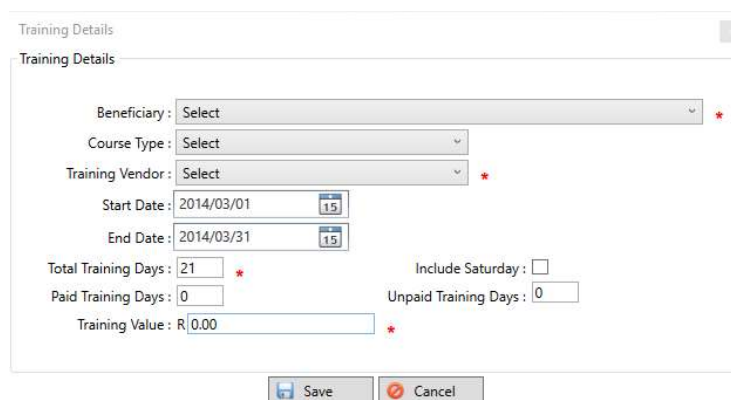


Figure 26: Add training screen

- Select the Beneficiary

SELF HELP: Don't see your beneficiary on the dropdown, then check the following:

- Synchronize your lookups (Figure 11 No 4)
- Ensure the beneficiary exists and is linked to you project (See 8. Beneficiary)

SELF HELP: The beneficiary is on the dropdown, but is written in red, then check the following:

- The beneficiary has validation errors and errors must be fixed before the beneficiary can be used
- Edit beneficiary and synchronize lookups (See 8. Beneficiary)

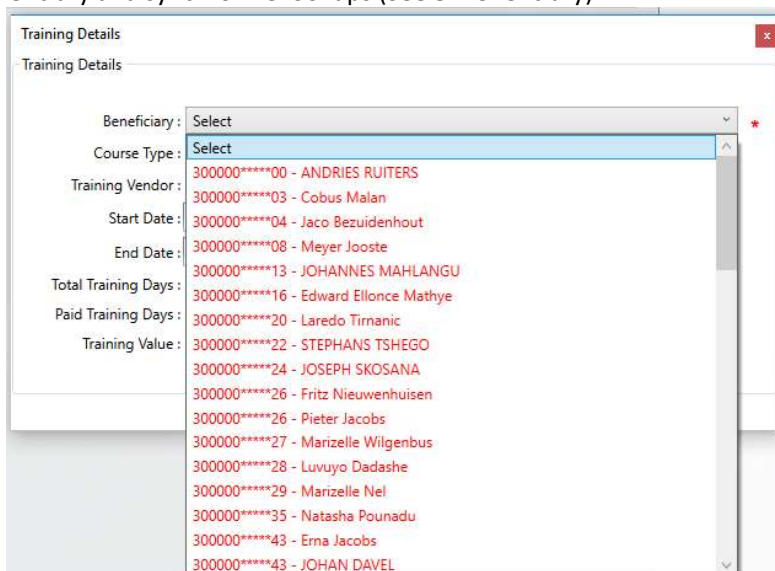


Figure 27: Beneficiary with validation errors

- iv. Select the Course Type
- v. Select the Training Vendor

SELF HELP: Don't see your vendor on the dropdown, then check the following:

- Synchronize your lookups (Figure 11 No 4)
- Ensure the vendor exists and is linked to you project (See 9. Vendors)

SELF HELP: The vendor is on the dropdown, but is written in red, then check the following:

- The vendor has validation errors and errors must be fixed before the vendor can be used
- Edit vendor and synchronize lookups (See 9. Vendors)

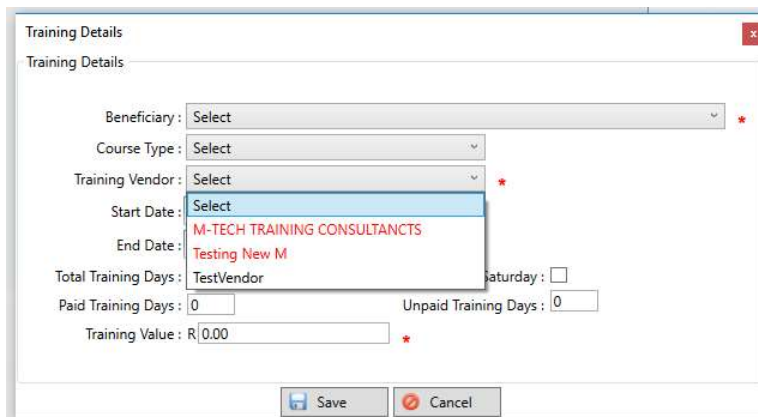


Figure 28: Vendor with validation errors

- vi. Select the training start and end date (See 4.4 Calendar on how to use the calendar)
- vii. Total training days will be calculated based on start and end date select

- viii. Check Include Saturdays if training was provided on a Saturday. **NOTE:** Sundays will always be excluded from total training days.
- ix. Capture Total paid and unpaid training days. **NOTE:** The sum of paid and unpaid training days must be the same as total training days.
- x. Add the Training amount
- xi. Click on Save

7.5.2. Edit Training Data

- v. To edit training data, click on the relevant project on the left, then click on the Employment/Training tab (See Figure 13)
- vi. Click on month for the correct year (See Figure 14)
- vii. Double click on the training data record you wish to edit.
- viii. Make the require changes and click on Save or Cancel to revert

7.6. Photos

- i. To add Photos to a project, select the relevant project on the left and click on the Photos tab on the right:

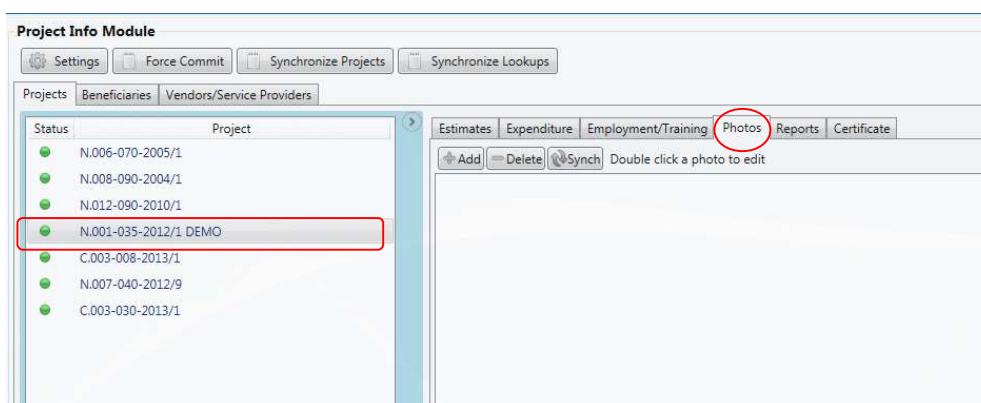


Figure 29: Project Photos

SELF HELP: Don't see the project on the project list, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

- ii. Click on the Add button. The following screen will pop up:

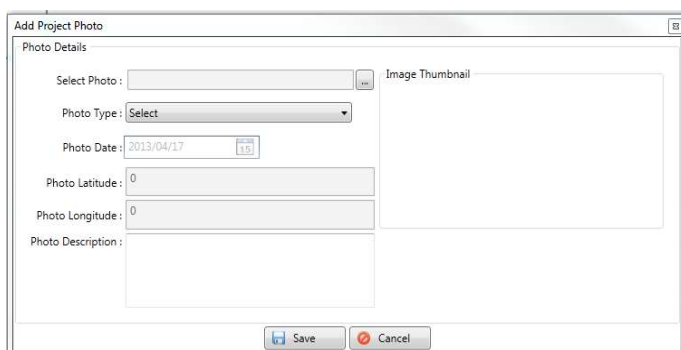



Figure 30: Add photo screen

- iii. Click on the  button
- iv. Select the photo to be added
- v. Select the Photo Type
- vi. Add a description
- vii. Click on Save

NOTE: The Photo Date will be added automatically

- viii. Once you have saved the photo will be displayed:

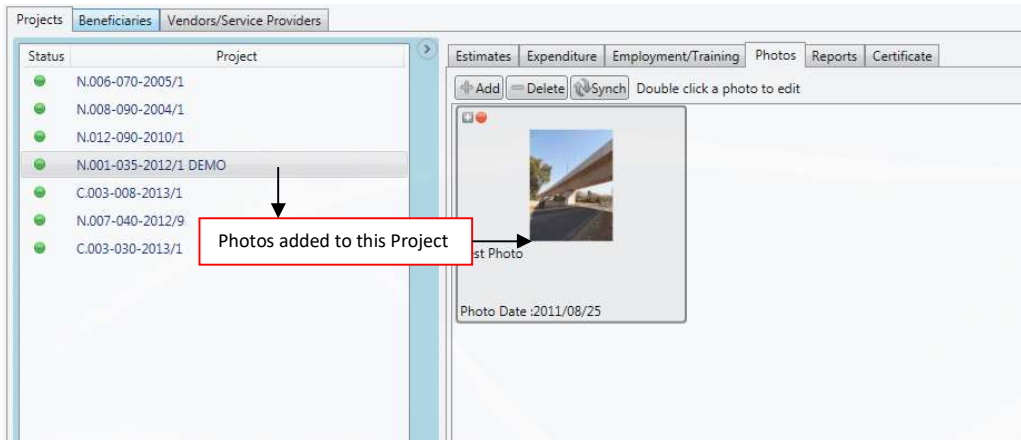


Figure 31: Photo not yet synced to server

- ix. Click on the  button. You will see this screen:

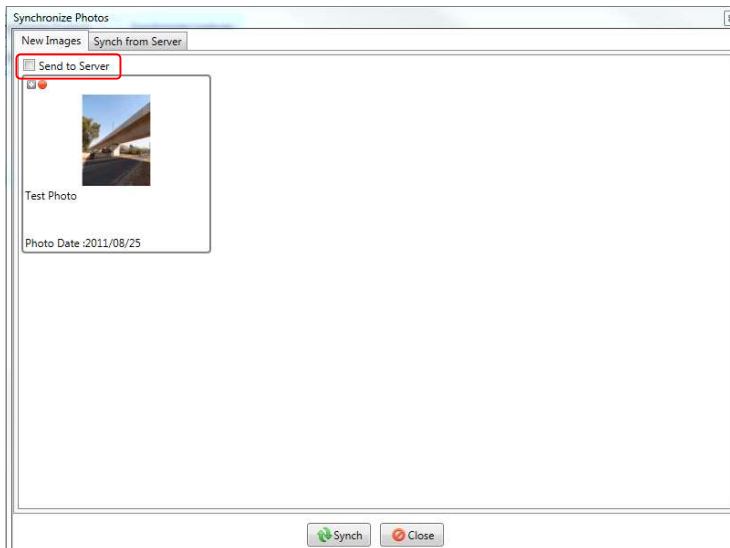


Figure 32: Photo synchronization

- x. Tick the *Send to Server* checkbox (Highlighted on the previous page) and Save to send the photo to the server.
- xi. Your photo(s) will now automatically show once you select the project:

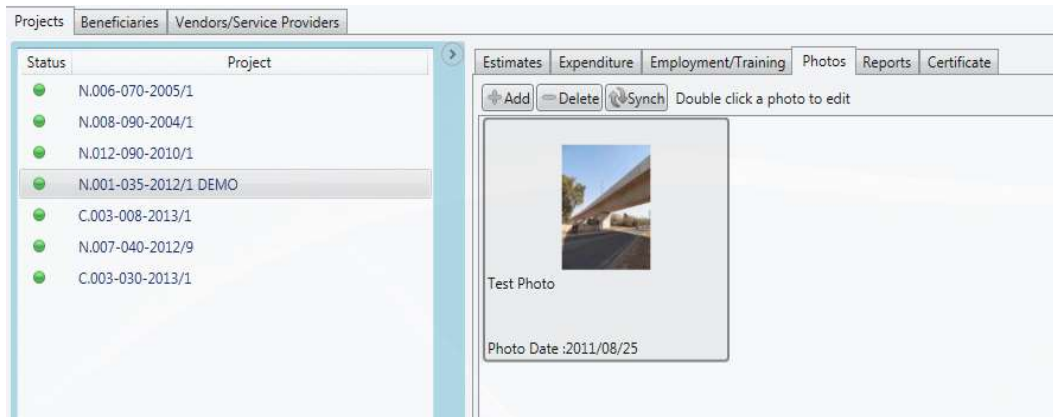


Figure 33: Synchronized photo

7.7. Reports

To download Project Reports, click on Reports Tab:

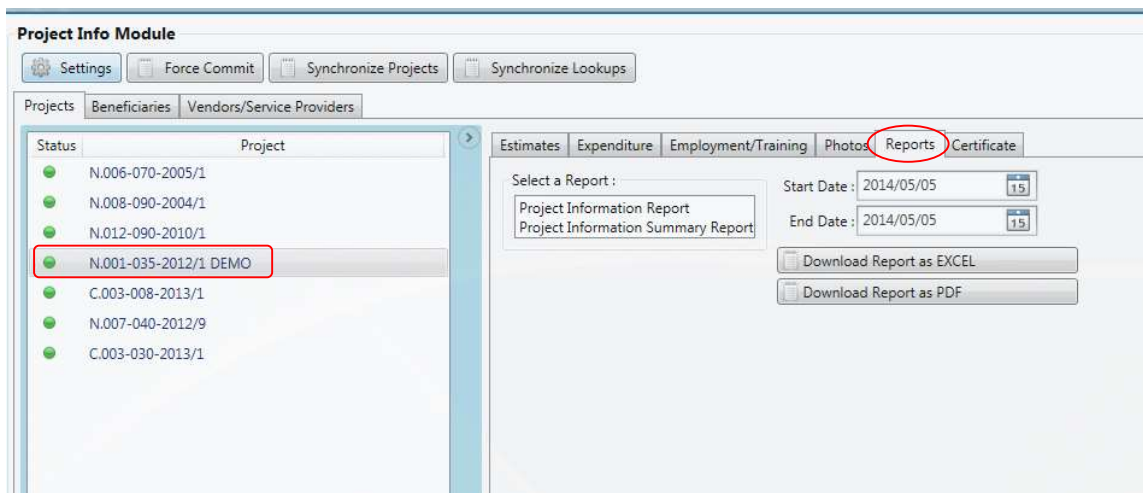



Figure 34: Project Reports

- Select a Report Type
- Select the date range by selecting a Start and End Date from the  buttons (See 4.4 Calendar on how to use the calendar)

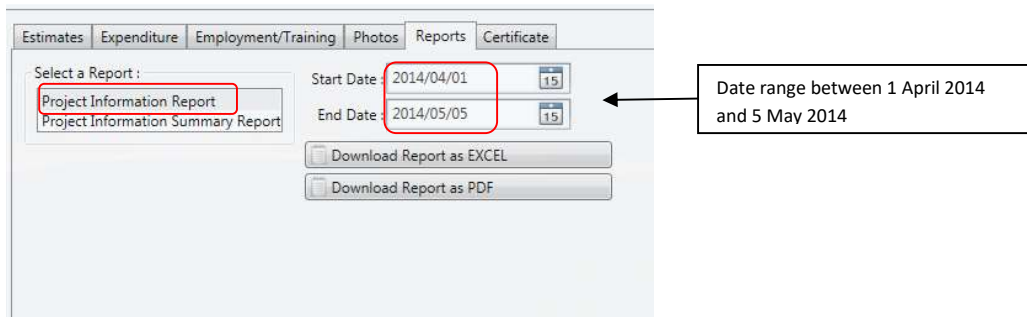


Figure 35: Report parameters

- Download the report in Excel or PDF format by clicking on the relevant button

8. Beneficiaries

A beneficiary is any person, working for the consultant, contractor and sub-contractor that receives a salary or wage on the applicable project.

Figure 36: Beneficiary tab

8.1. Add a Beneficiary using RSA ID or SmartIDcard

A Search needs to be done using the ID number to make sure that the beneficiary, to be added does not exist yet.

- i. Type the ID Number in the necessary field:

Figure 37: Search for beneficiary

- ii. Click on the Search icon
- iii. Should the system not find a beneficiary with the specified ID, you will get the following message:

Figure 38: No beneficiary found screen

- iv. Now you can click on the Add button
- v. Complete all the compulsory fields marked with an *

Add/Edit Beneficiary

Beneficiary Status: New Last updated: 30-01-2022

Beneficiary Details Projects

First Name(s): Qualification:

Last Name: Nat. Cert:

Initials: Address:

ID Doc Type: RSA ID Book City:

RSA ID Number: Code:

SA Citizen: Yes Municipality:

Date of Birth: 2022/01/30 Telephone Number:

Gender: Cellular Number:

Black Person: ☐

Disabled Person: ☐

Consent Form:

Home Language: Other Language 1: Other Language 2:

No. of people in household: 0 No. of dependants: 0 No. of schoolchildren: 0

Grant: Type:

Upload Photo

Upload ID

Verify Beneficiary

Save Cancel

Figure 39: Add/Edit beneficiary screen

- **First Name(s):** First name(s) as per the beneficiary's ID document
- **Last Name:** Last name as per the beneficiary's ID document
- **Initials:** Beneficiary's initials
- **ID Doc Type:** The software only accepts a RSA ID book, RSA smartIDcard or foreign passport as form of identification
- **RSA ID Number:** The beneficiary's ID number
- **Date of Birth:** The beneficiary's date of birth (See 4.4 Calendar on how to use the calendar)
- **Gender:** The beneficiary's gender

NOTE: The software will validate the beneficiary ID number to ensure it's a valid ID number. The software will also validate the date of birth and gender against the ID number to ensure the data has been captured correctly.

- **Black Person:** Select the checkbox if the beneficiary is considered a black person
- **Disabled Person:** Select the checkbox if the beneficiary is disabled
- **Qualification:** Select the beneficiary's highest qualification from the dropdown. If the beneficiary has a qualification less than grade 9, select Grade 9 from the dropdown
- **National Certificate:** The list contains only National Certificate according to construction seta
- **Address, City, Code, Municipality:** Capture the beneficiary's residential address
- **Telephone & Cell Number:** The beneficiary's contact details
- **Home Language & Other Languages:** Select the beneficiary's home language
- **Number of people in household:** This is the number of people staying in the beneficiary's household
- **Number of dependants:** Number of people dependant on the beneficiary
- **Number of schoolchildren:** Number of schoolchildren staying in the household
- **Grant & Type:** Does the beneficiary receive any grants and what type of grant.
- **Upload Photo and ID:** A photo of the beneficiary and copy of the ID document or Smartcard must be uploaded.
- **Upload Consent Form:** A beneficiary consent form for each beneficiary must be uploaded.

- **Verify Beneficiary:** Click this button to verify the data captured against the uploaded ID document. Only users with the correct role/permission can use this feature.

Photo of Beneficiary

- The photo must be a close-up of your head and top of your shoulders so that your face takes up 70 – 80% of the photo;
- Colour photo of high quality with no special effects;
- Show you looking directly at the camera;
- The photo must have appropriate brightness and contrast; and
- Size: Not bigger than 1MB
- Format: jpeg, png

Copy of ID Book/Smartcard

- High quality with no special effects;
- Clearly readable;
- Size: Not bigger than 2MB
- Format: jpeg, pdf

vi. Click on the Projects tab

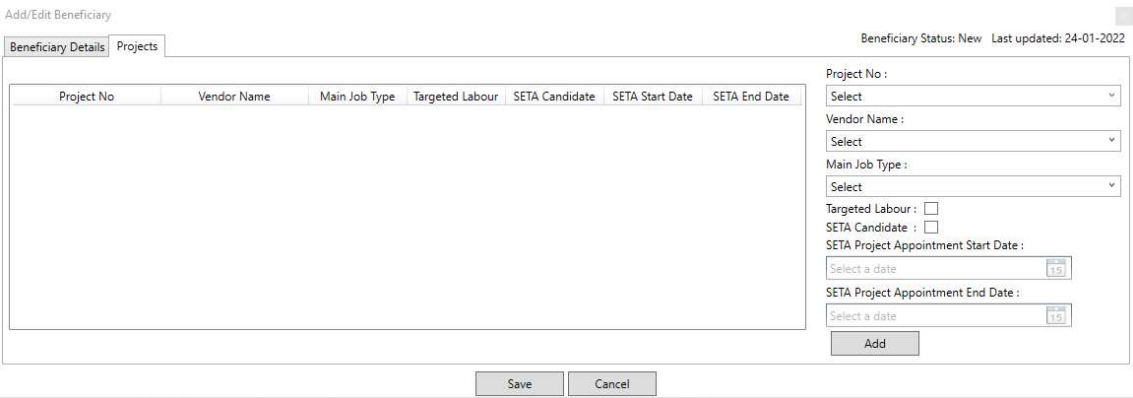


Figure 40: Link beneficiary to project

- vii. The beneficiary must be linked to at least one project before it can be saved.
- viii. Select the required fields from the dropdown:
- **Project No:** This is the project number the beneficiary must be linked to
 - **Vendor Name:** This is the vendor that the beneficiary is working for
 - **Main Job Type:** This is the beneficiary's main job type. This option will be the default option when capturing employment data, for the selected beneficiary.
 - **Targeted Labour:** Select this checkbox if the beneficiary is considered targeted labour as per the CPG agreement.
 - **SETA Candidate:** Select this checkbox if the beneficiary is a SETA candidate. If selected the appointments start date and end date must also be captured.

SELF HELP: Don't see the project on the project dropdown, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

- ix. Click on Add to link beneficiary
- x. Once you click on Save you will get a message asking you to confirm the Beneficiary details, click on Confirm.
- xi. Once you added all the required beneficiaries click on synchronize lookups to update your dropdowns

NOTE: You must be online to be able to search or add a beneficiary.

8.2. Add a Beneficiary using Foreign Passport

A Search needs to be done using the Passport number to make sure that the beneficiary to be added does not exist yet.

- i. Type the Passport Number in the necessary field:

Project Info Module

Settings Force Commit Synchronize Projects Synchronize Lookups Import Expenditure

Projects Beneficiaries Vendors/Service Providers

Please type ID number or Passport Number of the beneficiary below and click the search button. This is to prevent duplicates or altering the details of the incorrect beneficiary.

You must be online to manage beneficiaries.

RSA ID Number : or Passport Number : CP1000234D

NOTE: Please remember to lookups using the Lookup above when you have finish Beneficiaries.

First Name	Last Name	RSA ID	Passport No.	Gender	BP	Disability
Add new Beneficiary						

Figure 41: Search for beneficiary

- ii. Click on the *Search* icon
- iii. Should the system not find a beneficiary with the specified Passport, you will get the following message:

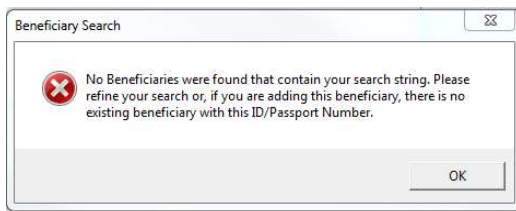




Figure 42: No beneficiary found screen


- iv. Now you can click on the *Add* button
- v. Complete all the compulsory fields marked with an *

Add/Edit Beneficiary

Beneficiary Status: New Last updated: 24-01-2022

Beneficiary Details		Projects	
First Name(s):	<input type="text"/>	Qualification:	Select
Last Name:	<input type="text"/>	Nat. Cert:	<input type="text"/>
Initials:	<input type="text"/>	Address:	<input type="text"/>
ID Doc Type:	Foreign Passport	City:	<input type="text"/>
Passport No:	<input type="text"/>	Code:	<input type="text"/>
Country of Origin:	Select	Municipality:	Select
Date of Birth:	2022/01/24	Telephone Number:	<input type="text"/>
Gender:	Select	Cellular Number:	<input type="text"/>
Black Person:	<input type="checkbox"/>	Consent Form: 	
Disabled Person:	<input type="checkbox"/>	<input type="button" value="Upload"/> <input type="button" value="Open"/>	
Visa Type:	Select	Control No:	<input type="text"/>
Enter on or before:	Select a date	Valid (months):	Select
Home Language:	Select	Other Language 1:	Select
No. of people in household:	0	Other Language 2:	Select
Grant:	Select	No. of dependants:	0
Type:	Select	No. of schoolchildren:	0








Figure 43: Add/Edit beneficiary screen

- **First Name(s):** First name(s) as per the beneficiary's Passport document
- **Last Name:** Last name as per the beneficiary's Passport document
- **Initials:** Beneficiary's initials
- **ID Doc Type:** The software only accepts a RSA ID book, RSA smartIDcard or foreign passport as form of identification
- **Passport Number:** The beneficiary's Passport number
- **Country of Origin:** Country of origin as per the passport
- **Date of Birth:** The beneficiary's date of birth (See 4.4 Calendar on how to use the calendar)
- **Gender:** The beneficiary's gender
- **Black Person:** Select the checkbox if the beneficiary is considered a black person
- **Disabled Person:** Select the checkbox if the beneficiary is disabled
- **Qualification:** Select the beneficiary's highest qualification from the dropdown. If the beneficiary has a qualification less than grade 9, select Grade 9 from the dropdown
- **National Certificate:** The list contains only National Certificate according to construction seta
- **Address, City, Code, Municipality:** Capture the beneficiary's residential address
- **Telephone & Cell Number:** The beneficiary's contact details
- **Visa Type:** Type of visa as per the visa
- **Control Number:** The visa's control number
- **Enter on or before:** Date as of when the visa will be valid
- **Valid:** The number of months the visa is valid for
- **Home Language & Other Languages:** Select the beneficiary's home language
- **Number of people in household:** This is the number of people staying in the beneficiary's household

- **Number of dependants:** Number of people dependant on the beneficiary
- **Number of schoolchildren:** Number of schoolchildren staying in the household
- **Grant & Type:** Does the beneficiary receive any grants and what type of grant.
- **Upload Photo, Passport and Visa:** A photo of the beneficiary, a copy of the passport and work visa must be uploaded.
- **Upload Consent Form:** A beneficiary consent form for each beneficiary must be uploaded.
- **Verify Beneficiary:** Click this button to verify the data captured against the uploaded ID document. Only users with the correct role/permission can use this feature.

Photo of Beneficiary

- The photo must be a close-up of your head and top of your shoulders so that your face takes up 70 – 80% of the photo;
- Colour photo of high quality with no special effects;
- Show you looking directly at the camera;
- The photo must have appropriate brightness and contrast; and
- Size: Not bigger than 1MB
- Format: jpeg, png

Copy of passport and visa

- High quality with no special effects;
- Clearly readable;
- Size: Not bigger than 2MB
- Format: jpeg, pdf

vi. Click on the Projects tab

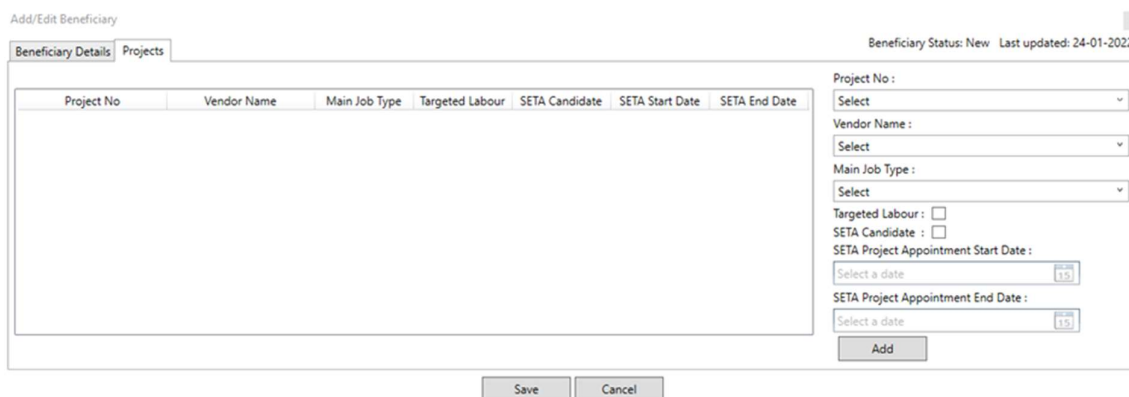


Figure 44: Link beneficiary to project screen

vii. The beneficiary must be linked to at least one project before it can be saved.


viii. Select the required fields from the dropdown:

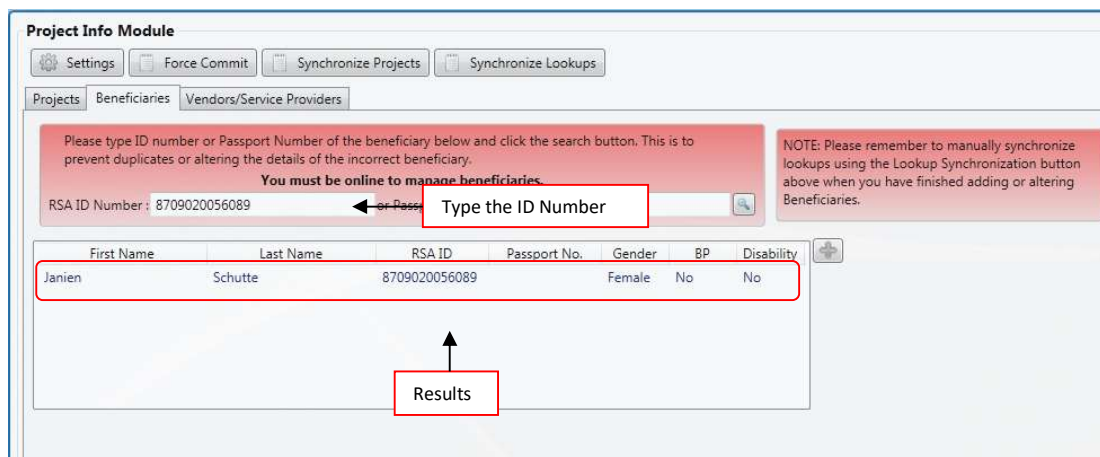
- **Project No:** This is the project number the beneficiary must be linked to
- **Vendor Name:** This is the vendor that the beneficiary is working for
- **Main Job Type:** This is the beneficiary's main job type. This option will be the default option when capturing employment data, for the selected beneficiary.
- **Targeted Labour:** Select this checkbox if the beneficiary is considered targeted labour as per the CPG agreement.
- **SETA Candidate:** Select this checkbox if the beneficiary is a SETA candidate. If selected the appointments start date and end date must also be captured.

SELF HELP: Don't see the project on the project dropdown, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
 - Restart your software
 - If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number
- ix. Click on Add to link beneficiary
- x. Once you click on Save you will get a message asking you to confirm the Beneficiary details, click on Confirm.
- xi. Once you added all the required beneficiaries click on synchronize lookups to update your dropdowns

8.3. Edit a Beneficiary

- i. Click on the Beneficiary Tab
- ii. Enter the ID or Passport number in the applicable field
- iii. Click on the Search icon 




Project Info Module

Settings Force Commit Synchronize Projects Synchronize Lookups

Projects Beneficiaries Vendors/Service Providers

Please type ID number or Passport Number of the beneficiary below and click the search button. This is to prevent duplicates or altering the details of the incorrect beneficiary.

You must be online to manage beneficiaries.

RSA ID Number : 8709020056089 

NOTE: Please remember to manually synchronize lookups using the Lookup Synchronization button above when you have finished adding or altering Beneficiaries.


First Name	Last Name	RSA ID	Passport No.	Gender	BP	Disability
Janien	Schutte	8709020056089		Female	No	No

Results

Figure 45: Search for a beneficiary

- iv. Click on a Beneficiary to view the beneficiary details
- v. Make the required changes and click on Save
- vi. Click on synchronize lookups to update your dropdowns

8.4. Link existing Beneficiary to a Project

- i. Click on the Beneficiary Tab
- ii. Enter the ID or Passport number in the applicable field
- iii. Click on the Search icon 

Project Info Module

Settings Force Commit Synchronize Projects Synchronize Lookups

Projects Beneficiaries Vendors/Service Providers

Please type ID number or Passport Number of the beneficiary below and click the search button. This is to prevent duplicates or altering the details of the incorrect beneficiary.

You must be online to manage beneficiaries.

RSA ID Number : 8709020056089

Type the ID Number

NOTE: Please remember to manually synchronize lookups using the Lookup Synchronization button above when you have finished adding or altering Beneficiaries.

First Name	Last Name	RSA ID	Passport No.	Gender	BP	Disability
Janien	Schutte	8709020056089		Female	No	No

Results

Figure 46: Search for a beneficiary

- iv. Click on a Beneficiary to view the beneficiary details
- v. Click on the Projects tab

Add/Edit Beneficiary

Beneficiary Status: New Last updated: 24-01-2022

Beneficiary Details Projects

Project No	Vendor Name	Main Job Type	Targeted Labour	SETA Candidate	SETA Start Date	SETA End Date
------------	-------------	---------------	-----------------	----------------	-----------------	---------------

Project No: Select

Vendor Name: Select

Main Job Type: Select

Targeted Labour: ☐

SETA Candidate: ☐

SETA Project Appointment Start Date: Select a date (15)

SETA Project Appointment End Date: Select a date (15)

Add

Save Cancel

Figure 47: Link beneficiary to project screen

- vi. The beneficiary must be linked to at least one project before it can be saved.
- vii. Select the required fields from the dropdown:
 - **Project No:** This is the project number the beneficiary must be linked to
 - **Vendor Name:** This is the vendor that the beneficiary is working for
 - **Main Job Type:** This is the beneficiary's main job type. This option will be the default option when capturing employment data, for the selected beneficiary.
 - **Targeted Labour:** Select this checkbox if the beneficiary is considered targeted labour as per the CPG agreement.
 - **SETA Candidate:** Select this checkbox if the beneficiary is a SETA candidate. If selected the appointments start date and end date must also be captured.

SELF HELP: Don't see the project on the project dropdown, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

- viii. Click on Add to link beneficiary
- ix. Once you click on Save you will get a message asking you to confirm the Beneficiary details
- x. Click on synchronize lookups to update your dropdowns

8.6. Verify Beneficiary Information




Before a beneficiary can be used to capture employment and training data the beneficiary's personal information must be verified. The beneficiary's information must only be verified once and after each change made to the beneficiary's personal information. The following data must be verified by the Contracts Engineer (CE) or Resident Engineer (RE):

- i. Beneficiary with an ID document or SmartIDcard

Verify Beneficiary

WARNING!!
Please verify that RSA ID No : is correct and that the beneficiary's details captured matches the ID document/Passport of the Beneficiary. This information will be supplied to SARS for verification and you will be held accountable for any incorrect information supplied.

Photo Document
Identification Document
Consent Document

First Name(s) :
Last Name :
Initials :
ID Doc Type : RSA ID Book
RSA ID Number :

SA Citizen : Yes
Date of Birth : 2022/01/30
Gender : Select
Black Person : ☐
Disabled Person : ☐

Figure 50: Verify Beneficiary screen using RSA ID info

- First Names
- Last Name
- Initials
- ID Number
- Date of Birth
- Gender
- Black Person
- Disabled Person
- Beneficiary Photo
- Beneficiary ID Document
- Consent Document

ii. Beneficiary with a Foreign Passport

Verify Beneficiary

WARNING!!


Please verify that Passport No : is correct and that the beneficiary's details captured matches the ID document/Passport of the Beneficiary. This information will be supplied to SARS for verification and you will be held accountable for any incorrect information supplied.


Photo Document


Passport Document


Consent Document

Visa Document









First Name(s) :

Last Name :

Initials :

ID Doc Type :

Foreign Passport

Passport No :

Visa Type :

Select

Enter on or before :

Select a date

Country of Origin :

Select

Date of Birth :

2022/01/30

Gender :

Select

Black Person :

☐

Disabled Person :

☐

Control No :

Valid (months) :

Select

Confirm Verification

Figure 51: Verify Beneficiary screen using Passport info

- First Names
- Last Name
- Initials
- Passport Number
- Country of Origin
- Date of Birth
- Gender
- Black Person
- Disabled Person
- Beneficiary Photo
- Beneficiary ID Document
- Consent Document
- Visa Information

A beneficiary can be verified by the CE/RE in two ways:

8.6.1. Method 1

- Open the Beneficiary tab
- Search for the beneficiary using their ID or Passport number
- Click on the beneficiary in the search result grid

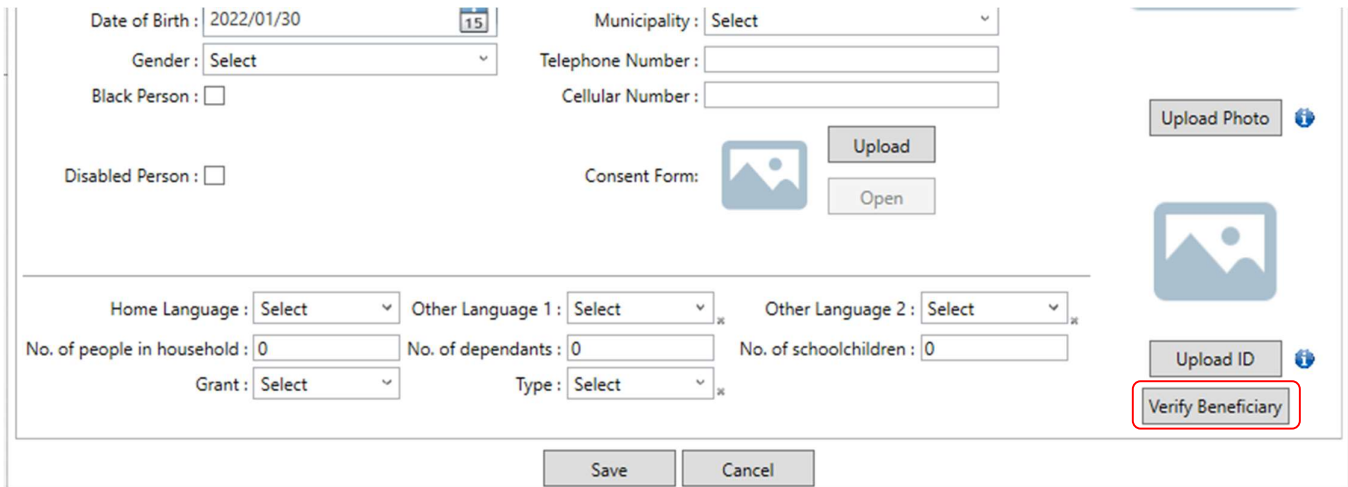


Figure 52: Open Verify screen

- Click on Verify Beneficiary
- On the Verify Beneficiary screen ensure that all the data is captured correctly, make the required changes, or request the capture user to make the required changes. If all the data is correct, then click on Confirm Verification

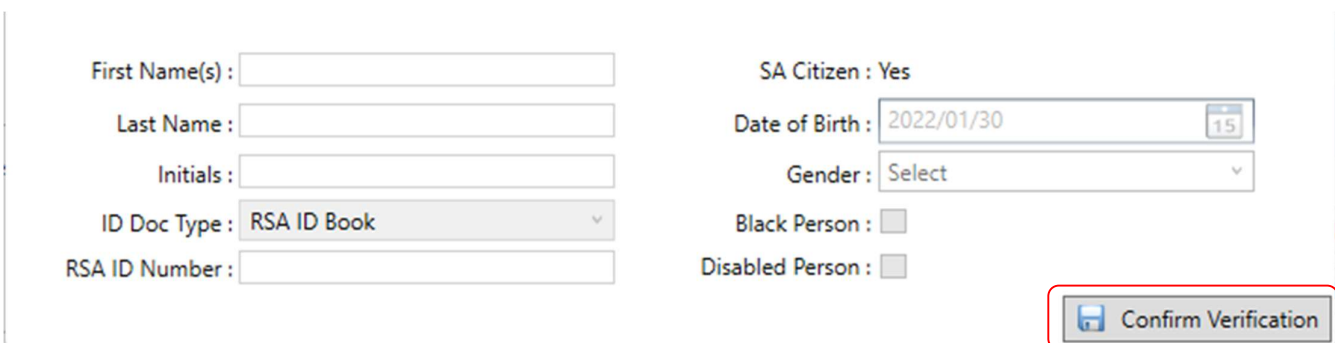


Figure 53: Confirming Verification

- Once all the required beneficiaries have been verified then click on synchronize lookups to update your dropdowns

NOTE: You must be online to be able to verify a beneficiary

8.6.2. Method 2

- Open the Verify Beneficiary/Vendors Tab

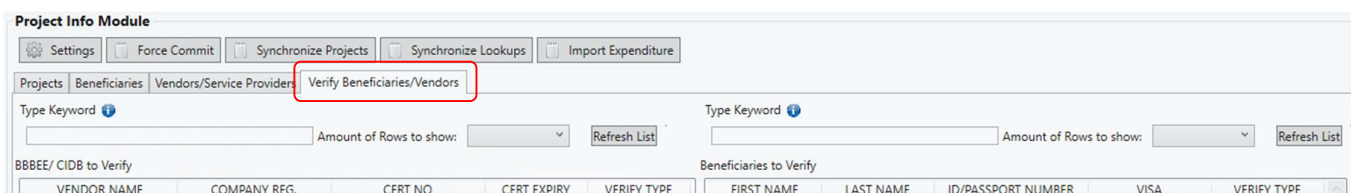



Figure 54: Verify Beneficiary/Vendor tab

NOTE: This tab can only be accessed by the RE/CE on a project

Type Keyword 

Amount of Rows to show: Refresh List

Beneficiaries to Verify

FIRST NAME	LAST NAME	ID/PASSPORT NUMBER	VISA	VERIFY TYPE
Karl	Arnold	300000000944		RSA ID
Sello	Mokoena	3000000030981		RSA ID
William	Mpuru	3000000090747		RSA ID
Asanda	August	3000000070625		RSA ID
Madillo	Moloi	3000000077431		RSA ID
Maria	Malinga	3000000019543		RSA ID
Emily	Rampoli	3000000007610		RSA ID
Lizzy	Gumede	3000000046751		RSA ID
Piet	Moshasha	3000000044733		RSA ID
Neilan	Naidoo	3000000077135		RSA ID


Figure 55: List of Beneficiaries that must be verified

- ii. On the Verify Beneficiaries/Vendors tab you will see all the beneficiaries that must be verified. By default, the list will only return 10 records for verification. This can be changed by selecting the number of rows in the amount of Rows to show dropdown, then click on refresh list.
- iii. Click on the beneficiary in the search result grid

Date of Birth : 2022/01/30 Municipality : Select

Gender : Select Telephone Number :

Black Person : ☐ Cellular Number :

Disabled Person : ☐ Consent Form:  Upload Open

Home Language : Select Other Language 1 : Select Other Language 2 : Select

No. of people in household : 0 No. of dependants : 0 No. of schoolchildren : 0

Grant : Select Type : Select

Upload Photo Upload ID

Verify Beneficiary

Save Cancel

Figure 56: Open Verify screen

- iv. Click on Verify Beneficiary
- v. On the Verify Beneficiary screen ensure that all the data is captured correctly, make the required changes, or request the capture user to make the required changes. If all the data is correct, then click on Confirm Verification

First Name(s) :	<input type="text"/>	SA Citizen : Yes	
Last Name :	<input type="text"/>	Date of Birth :	<input type="text" value="2022/01/30"/> <input type="button" value="15"/>
Initials :	<input type="text"/>	Gender :	<input type="text" value="Select"/> ▼
ID Doc Type :	<input type="text" value="RSA ID Book"/> ▼	Black Person :	<input type="checkbox"/>
RSA ID Number :	<input type="text"/>	Disabled Person :	<input type="checkbox"/>

Figure 57: Confirming Verification

- vi. Once all the required beneficiaries have been verified then click on synchronize lookups to update your dropdowns

9. Vendors / Service Providers

A vendor is any organization or supplier that received a payment from the consultant, contractor or sub-contractor on the applicable project, excluding payments made to beneficiaries.

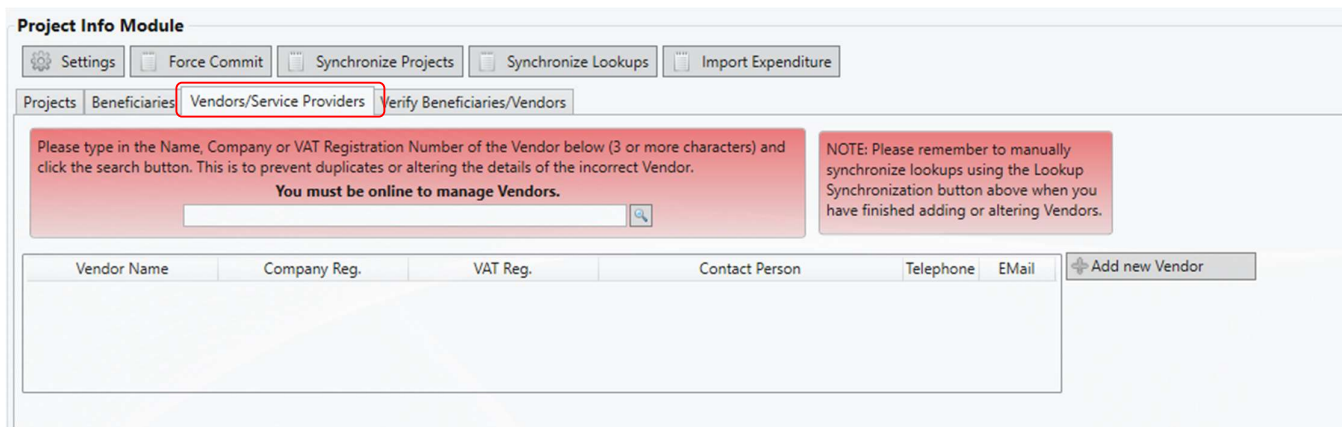


Figure 58: Vendor / Service Provider tab

9.1. Add a Vendor / Service Provider

A Search needs to be done to make sure that the Vendor / Service Provider does not exist yet

- In the Text field type in the Vendor / Service Provider name, company or VAT registration number:

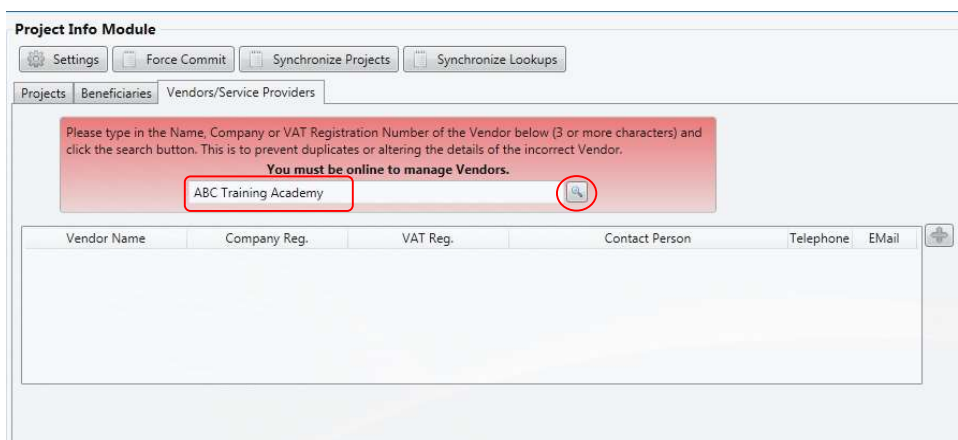


Figure 59: Search for a vendor

- Click on the Search icon 
- Should the system not find the Vendor / Service Provider you will get the following message:

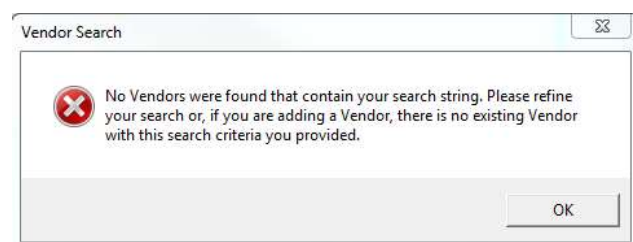


Figure 60: No vendor found screen

- Now you can click on the **Add** button

v. Complete all compulsory fields marked with an *

Figure 61: Add/Edit Vendor screen

- **Vendor Name:** Registered name of the vendor
- **Entity Type:** The type of entity
- **Registration No:** The vendor registration number. If the vendor has no registration number, like some JV's then check not registered.
- **Listed Company:** Check this if the company is listed on the JSE
- **Not VAT Registered:** Check this if the vendor is not registered for VAT
- **VAT Number:** The vendor's VAT number
- **Provides Training:** Check this if the vendor provides accredited training
- **Accreditation No:** This is the vendors training accreditation number
- **Designation Group:** Select the applicable group
- **BBBEE Status:** Select the BBBEE level as per BBBEE certificate, if applicable
- **Scorecard Type:** This is the type of scorecard used to calculate the BBBEE Level
- **BBBEE Affidavit:** Check if a BBBEE affidavit was used instead of a certificate
- **BBBEE Cert No:** The BBBEE certificate no as per the certificate
- **BBBEE Cert Exp:** The BBBEE certificate expiry date as per the certificate

NOTE: The capturing of BBBEE information has moved to new tab – BBBEE – See 9.1.3 BBBEE Certificate

- **CIBD Grading and Level:** This is the vendor's CIBD grading and level as per CIBD certificate, if applicable
- **CIBD Cert No:** The CIBD certificate no as per the certificate
- **CIBD Expiry:** The CIBD certificate expiry date as per the certificate

NOTE: The capturing of CIBD information has moved to new tab – CIBD – See 9.1.2 CIBD Certificate

- **Vendor Division and Group:** Select the applicable vendor division and group

- **Not Registered at CSD:** Check this option if the vendor is not registered at the CSD
- **CSD Vendor No:** The vendors CSD vendor number
- **% Ownership:** The % must be captured if company is listed company or when vendor has a BBBEE certificate. The % black and % black woman owned will be as per BBBEE certificate. An affidavit will be required for the other percentages, and must be captured as per affidavit.
- **Contact Detail:** The vendor's contact details
- **JV / Partnership Agreement Upload:** If the vendor is JV or partnership the agreement must be uploaded
- **Upload BBBEE certificate:** Copy of BBBEE certificate must be uploaded
- **Upload Additional Affidavit:** Affidavit of the other ownership percentages must be uploaded
- **Upload CIDB certificate:** Copy of the CIDB certificate must be uploaded

- vi. Capture Vendor Equity details on the Vendor Equity Details tab. This will be required if the vendor is not Listed and has no BBBEE certificate.

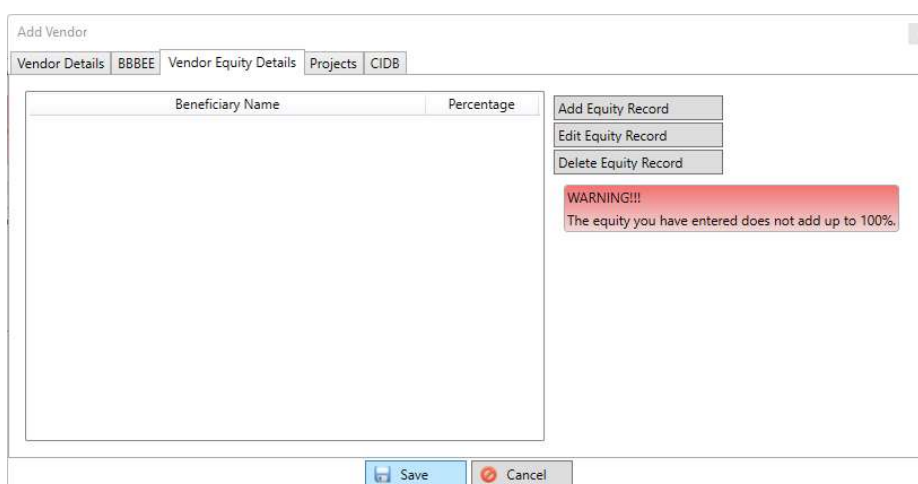


Figure 62: Link vendor to a project

- vii. Click on Add Equity Record and search for the beneficiary using their RSA ID or foreign passport number. Can't find the beneficiary then please refer to 8. Beneficiaries on how to add a beneficiary.

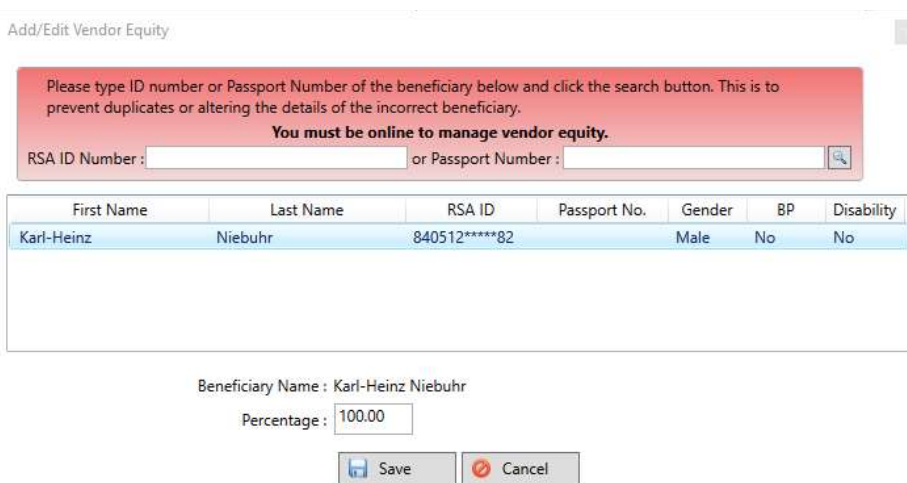


Figure 63: Search for beneficiary

- viii. Click on the beneficiary, capture percentage ownership and click on Save
- ix. Click on the Projects tab and link the vendor to the applicable project(s)

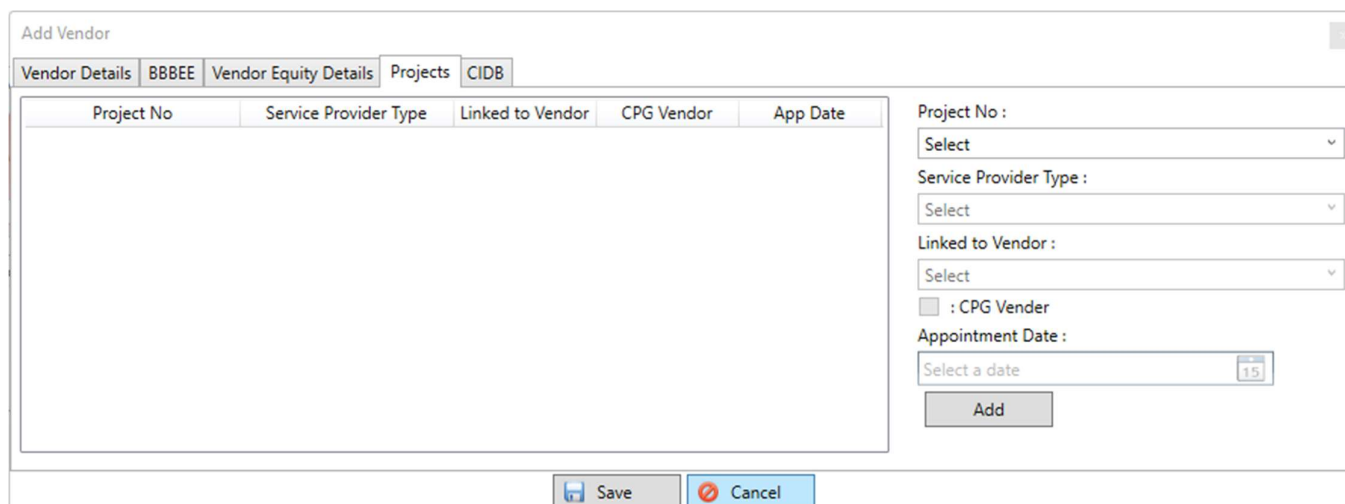


Figure 64: Link vendor to a project

- x. Select the required fields from the dropdown:
 - **Project No:** This is the project number the vendor must be linked to
 - **Service Provider Type:** A vendor can be any one of the following types: Consultant, Contractor, Sub-contractor or Supplier
 - **Linked to Vendor:** If the vendor type is set to Sub-contractor or Supplier then the vendor must be linked to the vendor that they are a sub-contractor or supplier of. This is important to calculate the CPG correctly.
 - **CPG Vendor:** Select this checkbox if the vendor was appointed under the 14-point plan and must be included in the CPG calculations
 - **Tender Closure Date:** If this vendor was appointed under the 14-point plan and the CPG vendor checkbox has been selected then the tender closure date under which this vendor was appointed, must be captured. When this date is set the system will check if a BBBEE certificate for this date has been uploaded. If not it will be required that the BBBEE certificate/affidavit that was valid at closing date of tender/quotation, to be uploaded. See 9.1.3 BBBEE Certificate for more information on how to upload a BBBEE certificate.
- xi. Click on Add
- xii. Click on Save to add or Cancel to cancel
- xiii. Once you added all the required beneficiaries click on synchronize lookups to update your dropdowns

NOTE: You must online to be able to search or add a vendor / service provider.

9.1.1. Entity Types

The following options will be available on the dropdown, and depending on the option selected, other information might be required:

- Company
- CC
- Trust
- Joint Venture
- Sole Proprietor
- Partnership

Company, CC & Trust

A registration number must be captured for a Company, CC or Trust. This number must be unique and can only exist once in the Database.

Joint Venture & Partnership

If the joint venture or partnership is registered the registration number must be captured. If not the not registered checkbox must be checked, then the registration number will not be required and the joint venture or partnership agreement must be uploaded.

Sole Proprietor

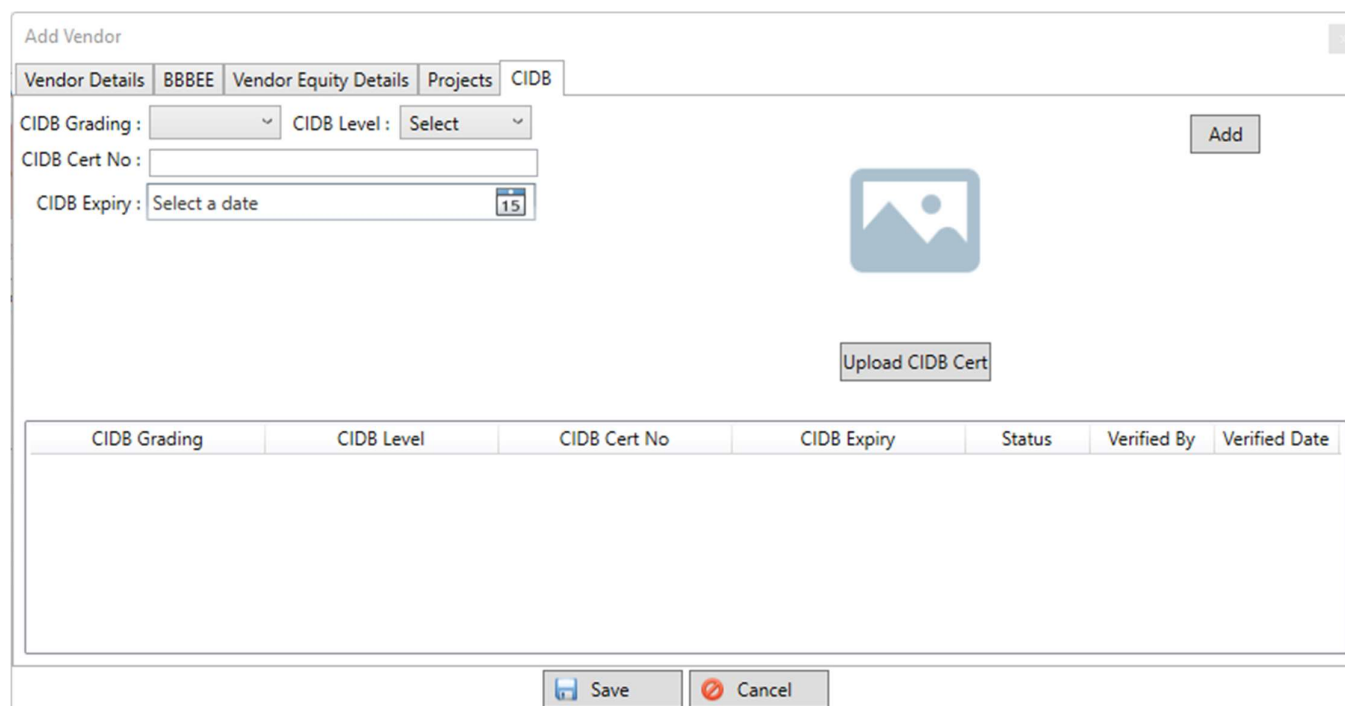
The owner must be linked to the vendor. Before the owner can be linked, he/she must be added as a beneficiary first. Only one beneficiary can be linked, but a beneficiary can be linked to more than one vendors.

9.1.2. CIDB Registration

Not every vendor will be registered at the CIDB, if not then Ungraded must be selected on the CIDB Grading dropdown.

If registered the correct grading and level must be selected, the certificate number and expiry date captured and a copy of the CIDB certificate must be uploaded.

To enable the software to keep history of CIDB data a new tab was added for the capturing of CIDB information





Add Vendor

Vendor Details | BBEE | Vendor Equity Details | Projects | **CIDB**

CIDB Grading: CIDB Level:

CIDB Cert No:

CIDB Expiry: 



CIDB Grading	CIDB Level	CIDB Cert No	CIDB Expiry	Status	Verified By	Verified Date

Figure 65: CIDB tab

ADD CIDB CERTIFICATE

- i. Capture the following info
 - a. CIDB Grading
 - b. CIDB Level
 - c. CIDB Certificate Number
 - d. CIDB Expiry Date

- ii. Click on Upload CIDB cert to upload the CIDB Certificate (See document requirement 9.1.5 Supporting Documents Upload)
- iii. Click on Add

EDIT CIDB CERTIFICATE


Add Vendor

Vendor Details
BBBEE
Vendor Equity Details
Projects
CIDB

CIDB Grading: CE
CIDB Level: Level 2

CIDB Cert No: CW459/89/2012

CIDB Expiry: 2022/02/10



Upload CIDB Cert

Cancel
Update
Delete
Verify

CIDB Grading	CIDB Level	CIDB Cert No	CIDB Expiry	Status	Verified By	Verified Date
CE	Level 2	CW459/89/2012	10/02/2022	New		

Save
Cancel

Figure 66: CIDB tab

- i. To edit a CIDB entry click on the record you wish to edit, in the list at the bottom
- ii. Make the required changes
- iii. Click on Update to update the record; Cancel to cancel the update; Delete to delete the record
- iv. Click on Save

9.1.3. BBBEE Certificate

A vendor can either be non-compliant or have a level 1 – 8 BBBEE certificate. The certificate can be obtained with one of the three score cards:

- Generic
- QSE
- EME

If a vendor used the generic scorecard, the BBBEE certificate number and expire date must be captured and a copy of the certificate must be uploaded. BBBEE Affidavit cannot be checked.

If the QSE and EME scorecard was used, the vendor must either produce an affidavit or a BBBEE certificate. If the affidavit option was checked the expiry date must be captured and a copy of the affidavit must be. If not the BBBEE certificate number and expire date must be captured and a copy of the certificate must be uploaded.

No further BBBEE information must be captured if the BBBEE certificate is set to non-compliant.

The vendor equity is also linked to the BBBEE status. If the status is set to non-compliant the % black owned, % black female owned, % black youth owned and % disabled owned must be disabled, unless listed company is checked, and the

vendor equity must be captured on the equity tab. If the status is set to level 1 – 8, the black, woman, youth and disabled fields must be captured and equity tab be disabled.

BBBEE Certificate

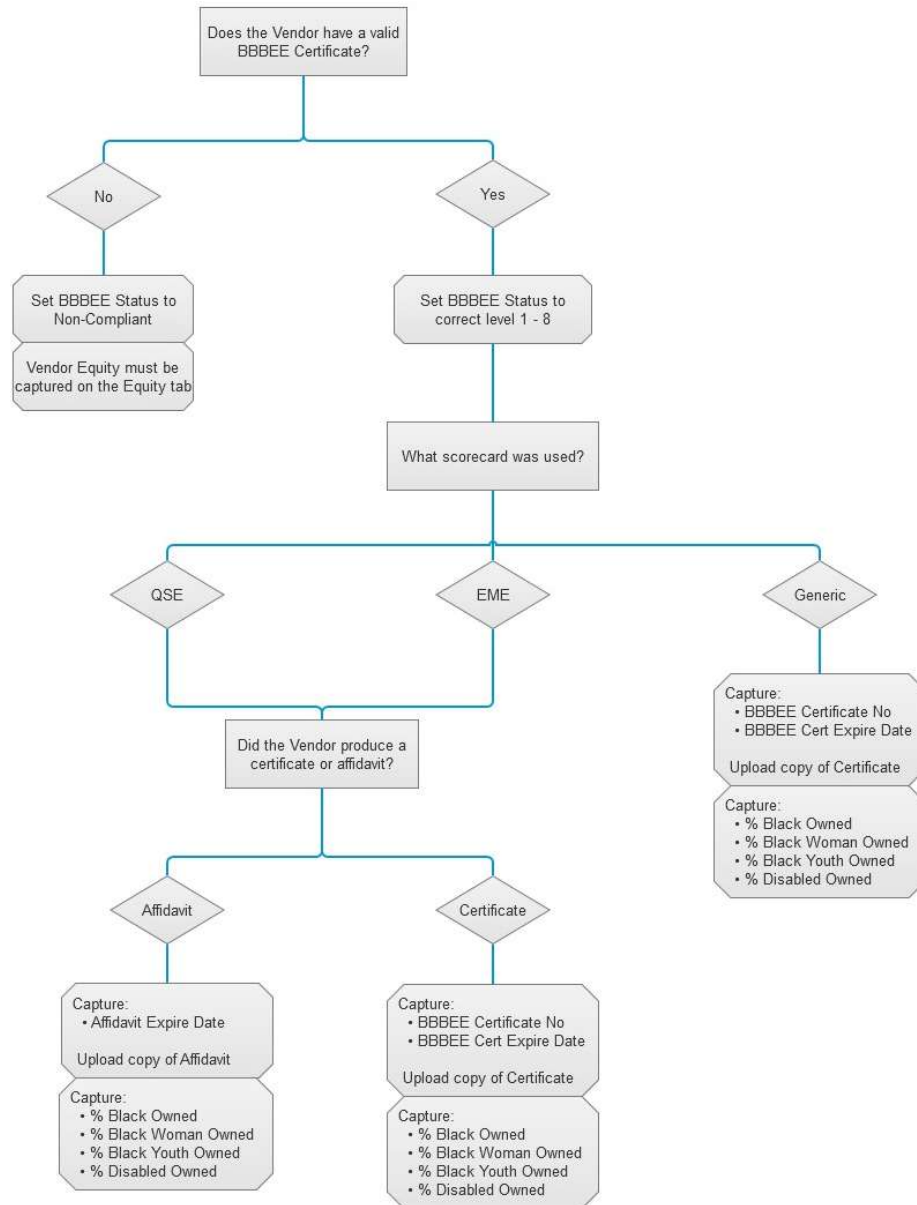


Figure 67: BBBEE workflow

To enable the software to keep history of BBBEE data a new tab was added for the capturing of BBBEE information

Figure 68: BBBEE tab

ADD BBBEE CERTIFICATE

- i. Capture the following information
 - a. BBBEE Status
 - b. Scorecard Type
 - c. BBBEE Affidavit if applicable
 - d. BBBEE Certificate Number
 - e. BBBEE Certificate/Affidavit Expiry date
 - f. % Ownership as per the BBBEE certificate
- ii. Click on Upload BBBEE certificate to upload the BBBEE certificate (See document requirement 9.1.5 Supporting Documents Upload)
- iii. Click on Add

EDIT BBBEE CERTIFICATE

BBBEE Status	Scorecard Type	BBBEE Affidavit	Cert No	Cert Exp	% Black	% Woman	% Youth	% Pw Disabilities	% Rural	% Military Veterans	Status	Verified By	Verified Date
Level 4	EME	False	BBE25637/2021	01/04/2022	80,00	30,00	0	10,00	0	0	New		

Figure 69: BBBEE tab

- i. To edit a BBBEE entry click on the record you wish to edit, in the list at the bottom
- ii. Make the required changes

- iii. Click on Update to update the record; Cancel to cancel the update; Delete to delete the record
- iv. Click on Save

9.1.4. Vendor Division and Vendor Group

Vendor type will consist of 2 dropdown options. The first dropdown, Vendor Division, only has the top 10 level options as seen below:

- 1 Agriculture, hunting, forestry and fishing
- 2 Mining and quarrying
- 3 Manufacturing
- 4 Electricity, gas and water supply
- 5 Construction
- 6 Wholesale and retail trade; repair of motor vehicles, motor cycles and personal and household goods; hotels and restaurants
- 7 Transport, storage and communication
- 8 Financial intermediation, insurance, real estate and business services
- 9 Community, social and personal services
- 10 Private household extraterritorial organisations, representatives of foreign governments and other activities not adequately defined

The second dropdown, Vendor Group, will depend on what was selected in the first dropdown. Below are the options for the second dropdown for each of the above 10 items.

For more information on vendor types, visit STATSSA: http://www.statssa.gov.za/additional_services/sic/contents.htm

1 Agriculture, hunting, forestry and fishing

- 11110 Growing of cereals and other crops n.e.c.
- 11120 Growing of vegetables, horticultural specialities and nursery products
- 11130 Growing of fruit, nuts, beverage and spice crops
- 11210 Farming of cattle, sheep, goats, horses, asses, mules and hinnies; dairy farming
- 11220 Other animal farming; production of animal products n.e.c.
- 11300 Growing of crops combined with farming of animals (mixed farming)
- 11400 Agricultural and animal husbandry services, except veterinary activities
- 11510 Game propagation
- 11520 Hunting and trapping, including related services
- 11600 Production of organic fertilizer
- 12100 Forestry and related services
- 12200 Logging and related services

2 Mining and quarrying

- 21000 Mining of coal and lignite
- 22110 Extraction of crude petroleum and natural gas
- 22120 Service activities incidental to oil and gas extraction, excluding surveying
- 23000 Mining of gold and uranium ore
- 24100 Mining of iron ore
- 24210 Mining of chrome
- 24220 Mining of copper

24230 Mining of manganese
24240 Mining of platinum group metals
24290 Other metal ore mining, except gold and uranium
25110 Quarrying: Dimension stone (granite, marble, slate, and wonderstone)
25120 Quarrying: Limestone and limeworks
25190 Other stone quarrying, including stone crushing and clay and sandpits
25200 Mining of diamonds (including alluvial diamonds)
25311 Mining of phosphates
25319 Other chemical and fertilizer mineral mining
25320 Extraction and evaporation of salt
25391 Mining of precious and semi-precious stones, except diamonds
25392 Mining of asbestos
25399 Mining of other minerals and materials n.e.c
25900 Services activities incidental to mining of minerals


3 Manufacturing

30111 Slaughtering, dressing and packing of livestock, including poultry and small game for meat
30112 Manufacture of prepared and preserved meat, including sausage; by-products (hides, bones, etc.)
30113 Production of lard and other edible fats
30120 Manufacture of canned, preserved and processed fish, crustacea and similar foods (except soups)
30130 Manufacture of canned, preserved, processed and dehydrated fruit and vegetables (except soups), including fruit juices, juice extracts and potato flour meal
30141 Manufacture of crude oil and oilseed cake and meal
30142 Manufacture of compound cooking fats, margarine and edible oils
30201 Processing of fresh milk (pasteurising, homogenising, sterilising and vitaminising)
30202 Manufacture of butter and cheese
30203 Manufacture of ice cream and other edible ice, whether or not containing cream or chocolate
30204 Manufacture of milk powder, condensed milk and other edible milk products, e.g. ghee, casein or lactose
30311 Manufacture of flour and grain mill products, including rice and vegetable milling; grain mill residues
30312 Manufacture of breakfast foods
30320 Manufacture of starches and starch products
30330 Manufacture of prepared animal feeds
30410 Manufacture of bakery products
30420 Manufacture of sugar, including golden syrup and castor sugar
30430 Manufacture of cocoa, chocolate and sugar confectionery
30440 Manufacture of macaroni, noodles, couscous and similar farinaceous products
30491 Manufacture of coffee, coffee substitutes and tea
30492 Manufacture of nut foods
30499 Manufacture of spices, condiments, vinegar, yeast, egg products, soups and other food products n.e.c.
30510 Distilling, rectifying and blending of spirits; ethyl alcohol production from fermented materials; manufacture of wine
30521 Breweries, except sorghum beer breweries
30522 Sorghum beer breweries
30523 Manufacture of malt
30530 Manufacture of soft drinks; production of mineral waters
30600 Manufacture of tobacco products
31111 Preparatory activities in respect of animal fibres, including washing, combing and carding of wool
31112 Preparatory activities in respect of vegetable fibres
31113 Spinning, weaving and finishing of yarns and fabrics predominantly of wool and other animal fibres
31114 Spinning, weaving and finishing of yarns and fabrics predominantly of vegetable fibres
31120 Finishing of purchased yarns and fabrics

31211 Manufacture of blankets, made-up furnishing articles and stuffed articles
31212 Manufacture of tents, tarpaulins, sails and other canvas goods
31213 Manufacture of automotive textile goods (including safety belts, and seat covers)
31219 Manufacture of other textile articles (except apparel)
31220 Manufacture of carpets, rugs and mat
31230 Manufacture of cordage, rope, twine and netting
31290 Manufacture of other textiles n.e.c.
31301 Garment and hosiery knitting mills
31309 Other knitting mills
31401 Manufacture of men's and boys' clothing
31402 Manufacture of women's, girls' and infants' clothing
31403 Bespoke tailoring
31404 Manufacture of hats, caps and ties
31500 Dressing and dyeing of fur, manufacture of artificial fur, fur apparel and other articles of fur
31610 Tanning and dressing of leather
31621 Manufacture of travel goods and ladies' handbags
31629 Manufacture of other general and small goods of leather and leather substitutes, including harness and saddlery
31700 Manufacture of footwear
32101 Sawmilling and preserving of timber
32109 Other mill products, including wattle bark grinding and compressing
32210 Manufacture of veneer sheets; manufacture of plywood, laminboard, particle board and other panels and boards
32220 Manufacture of builders' carpentry and joinery
32230 Manufacture of wooden containers
32291 Manufacture of coffins (excluding the manufacture of coffins by funeral undertakers)
32292 Manufacture of Picture frames and framing
32299 Other articles of wood, cork, straw and plaiting materials, including woodcarving and woodturning
32310 Manufacture of pulp, paper and paperboard
32321 Manufacture of corrugated paper and paperboard
32322 Manufacture of containers of paper and paperboard
32391 Stationery
32399 Other paper products
32410 Publishing of books, brochures, musical books and other publications
32420 Publishing of newspapers, journals and periodicals
32430 Publishing of recorded media
32490 Other publishing
32510 Printing
32520 Service activities related to printing
32600 Reproduction of recorded media
33100 Manufacture of coke oven products
33210 Petrol, fuel oils, lubricating oils and greases, primarily from crude oil
33220 Petrol, fuel oils, lubricating oils and greases, primarily from coal
33230 Petrol, fuel oils, lubricating oils and greases, primarily from natural gas
33240 Lubricating oils and greases, primarily from other organic products
33250 Compounded and blended lubricating oils and greases from purchased materials other than crude petroleum
33290 Other petroleum/synthesised products n.e.c.
33300 Processing of nuclear fuel
33410 Manufacture of basic chemicals, except fertilizers and nitrogen compounds
33420 Manufacture of fertilizers and nitrogen compounds
33430 Manufacture of plastics in primary form and of synthetic rubber
33510 Manufacture of pesticides and other agro-chemical products

33520 Manufacture of paints, varnishes and similar coatings, printing ink and mastics
 33530 Manufacture of pharmaceuticals, medicinal chemicals and botanical products
 33541 Manufacture of soap and other cleaning compounds
 33542 Manufacture of perfumes, cosmetics and other toilet preparations
 33549 Manufacture of other preparations such as polishes, waxes and dressings
 33591 Manufacture of edible salt
 33592 Manufacture of explosives and pyrotechnic products
 33593 Manufacture of adhesives, glues, sizes and cements
 33599 Manufacture of other chemical products n.e.c.
 33600 Manufacture of man-made fibres
 33711 Manufacture of tyres and tubes
 33712 Rebuilding and retreading of tyres
 33790 Manufacture of other rubber products
 33800 Manufacture of plastic products
 34111 Manufacture of sheet and plate glass, glass blocks, tubes and rods; glass fibres and glass wool
 34112 Manufacture of glass containers; glass kitchenware and tableware; scientific and laboratory glassware, clock and watch glasses and other glass products n.e.c.
 34210 Manufacture of non-structural non-refractory ceramicware
 34220 Manufacture of refractory ceramic products
 34230 Manufacture of structural non-refractory clay and ceramic products
 34240 Manufacture of cement, lime and plaster
 34250 Manufacture of articles of concrete, cement and plaster
 34260 Cutting, shaping and finishing of stone
 34291 Manufacture of Abrasives
 34299 Manufacture of Other non-metallic mineral products n.e.c.
 35101 Basic iron and steel industries, except steel pipe and tube mills
 35102 Steel pipe and tube mills
 35201 Refining of precious metals, e.g. gold, silver, platinum
 35202 Manufacture of primary non-ferrous metal products, excluding precious metals
 35310 Casting of iron and steel
 35320 Casting of non-ferrous metals
 35411 Manufacture of metal structures or parts thereof
 35419 Other structural metal products, e.g. metal doors, windows and gates
 35420 Manufacture of tanks, reservoirs and similar containers of metal
 35430 Manufacture of steam generators, except central heating hot water boilers
 35510 Forging, pressing, stamping and roll-forming of metal; powder metallurgy
 35521 Treating and coating of metals
 35522 General mechanical engineering on a fee or contract basis
 35530 Manufacture of cutlery, hand tools and general hardware
 35591 Manufacture of metal containers, e.g. cans and tins
 35592 Manufacture of cables and wire products
 35593 Manufacture of springs (all types)
 35594 Manufacture of metal fasteners
 35599 Manufacture of other metal products n.e.c.
 35610 Manufacture of engines and turbines, except aircraft, vehicle and motor cycle engines
 35620 Manufacture of pumps, compressors, taps and valves
 35630 Manufacture of bearings, gears, gearing and driving elements
 35640 Manufacture of ovens, furnaces and furnace burners
 35650 Manufacture of lifting and handling equipment
 35690 Manufacture of other general purpose machinery
 35710 Manufacture of agricultural and forestry machinery
 35720 Manufacture of machine tools
 35730 Manufacture of machinery for metallurgy

35740 Manufacture of machinery for mining, quarrying and construction
35750 Manufacture of machinery for food, beverage and tobacco processing
35760 Manufacture of machinery for textile, apparel and leather production
35770 Manufacture of weapons and ammunition
35790 Manufacture of other special purpose machinery
35800 Manufacture of household appliances
35900 Manufacture of office, accounting and computing machinery
36100 Manufacture of electric motors, generators and transformers
36200 Manufacture of electricity distribution and control apparatus
36300 Manufacture of insulated wire and cable
36400 Manufacture of accumulators, primary cells and primary batteries
36501 Manufacture of electric bulbs and fluorescent tubes
36502 Manufacture of illuminated signs and advertising displays
36503 Manufacture of lamps and lampshades
36600 Manufacture of other electrical equipment n.e.c.
37100 Manufacture of electronic valves and tubes and other electric components
37200 Manufacture of television and radio transmitters and apparatus for line telephony and line telegraphy
37300 Manufacture of television and radio receivers, sound or video recording or reproducing apparatus and associated goods
37411 Manufacture of Orthopaedic appliances
37412 Manufacture of surgical, medical and dental supplies
37420 Manufacture of instruments and appliances for measuring, checking, testing, navigating and for other purposes, except industrial process control equipment
37430 Manufacture of industrial process control equipment
37500 Manufacture of optical instruments and photographic equipment
37600 Manufacture of watches and clocks
38100 Manufacture of motor vehicles
38200 Manufacture of bodies (coachwork) for motor vehicles; manufacture of trailers and semi-trailers
38301 Manufacture of radiators
38302 Activities of specialised automotive engineering workshops working primarily for the motor trade
38309 Manufacture of other motor vehicle parts and accessories
38410 Building and repairing of ships
38420 Building and repairing of pleasure and sporting boats
38500 Manufacture of railway and tramway locomotives and rolling stock
38600 Manufacture of aircraft and space craft
38710 Manufacture of motor cycles
38720 Manufacture of bicycles and invalid carriages
38790 Manufacture of other transport equipment n.e.c.
39101 Manufacture of furniture made predominantly of metal
39102 Manufacture of furniture made predominantly of plastic materials
39103 Manufacture of furniture made predominantly of materials other than metal, plastic or concrete
39211 Jewellery and related articles composed of precious metals, precious and semi-precious stones and pearls
39212 Diamond cutting and polishing
39219 Other precious and semi-precious stone cutting and polishing
39220 Manufacture of musical instruments
39230 Manufacture of sports goods
39240 Manufacture of games and toys
39291 Manufacture of brushes and brooms
39292 Manufacture of crayons, chalk, pens and pencils
39293 Manufacture of buttons, buckles, slide fasteners, etc
39294 Manufacture of number plates, signs and advertising displays, that are not electrical
39295 Engraving

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39299 Other industries not elsewhere classified, including rubber stamps, taxidermists, ostrich feathers, costume jewellery and novelties, umbrellas and canes
39510 Recycling of metal waste and scrap n.e.c.
39520 Recycling of non-metal waste and scrap n.e.c.

4 Electricity, gas and water supply

41111 Generation of electricity
41112 Distribution of purchased electric energy only
41113 Generation and/or distribution of electricity for own use
41200 Manufacture of gas; distribution of gaseous fuels through mains
41300 Steam and hot water supply
42000 Collection, purification and distribution of water

5 Construction

50211 Construction of homes
50219 Construction of other buildings
50220 Construction of civil engineering structures
50230 Construction of other structures
50240 Construction by specialist trade contractors
50310 Plumbing
50320 Electrical contracting
50330 Shop fitting
50390 Other building installation n.e.c.
50410 Painting and decorating
50490 Other building completion n.e.c.
50500 Renting of construction or demolition equipment with operators

6 Wholesale and retail trade; repair of motor vehicles, motor cycles and personal and household goods; hotels and restaurants

61101 Sales by commission agents
61102 Sales by commodity brokers
61103 Sales by auctioneers
61109 Other wholesale trade on a fee or contract basis
61210 Wholesale trade in agricultural raw materials and livestock
61221 Wholesale trade in foodstuffs
61222 Wholesale trade in beverages
61223 Wholesale trade in tobacco products
61310 Wholesale trade in textiles, clothing and footwear
61391 Wholesale trade in household furniture requisites and appliances
61392 Wholesale trade in books and stationery
61393 Wholesale trade in precious stones, jewellery and silverware
61394 Wholesale trade in pharmaceuticals, toiletries and medical equipment
61399 Wholesale trade in other household goods n.e.c
61410 Wholesale trade in solid, liquid and gaseous fuels and related products
61420 Wholesale trade in metal and metal ores
61430 Wholesale trade in construction materials, hardware, plumbing and heating equipment and supplies
61490 Wholesale trade in other intermediate products, waste and scrap


61501 Wholesale trade in office machinery and equipment including computers
61509 Wholesale trade in other machinery
61901 General wholesale trade
61909 Other wholesale trade n.e.c.
62110 Retail trade in non-specialised stores with food, beverages and tobacco predominating
62190 Other retail trade in non-specialised stores
62201 Retail trade in fresh fruit and vegetables
62202 Retail trade in meat and meat products
62203 Retail trade in bakery products
62204 Retail trade in beverages (bottle stores)
62209 Other retail trade in food, beverages and tobacco n.e.c.
62310 Retail trade in pharmaceutical and medical goods, cosmetic and toilet articles
62321 Retail trade in men's and boys' clothing
62322 Retail trade in ladies' and girls' clothing
62323 Retail trade by general outfitters and by dealers in piece goods, textiles, leather and travel accessories
62324 Retail trade in shoes
62330 Retail trade in household furniture appliances, articles and equipment
62340 Retail trade in hardware, paints and glass
62391 Retail trade in reading matter and stationery
62392 Retail trade in jewellery, watches and clocks
62393 Retail trade in sports goods and entertainment requisites
62399 Retail trade by other specialised stores
62400 Retail trade in second-hand goods in stores
62511 Retail trade in books via mail-order houses
62519 Other retail trade via mail-order houses
62520 Retail trade via stalls and markets
62590 Other retail trade not in stores
62601 Repair of footwear and leather goods
62602 Repair, servicing and installation of household and personal appliances
62609 Other repair services for the general public, n.e.c.
63110 Wholesale sale of motor vehicles
63121 Retail sale of new motor vehicles
63122 Retail sale of used motor vehicles
63201 Motor vehicle general repairs
63202 Motor vehicle electrical repairs
63203 Motor vehicle radiator repairs
63204 Motor vehicle body repairs
63209 Other motor vehicle maintenance and repairs n.e.c.
63311 Sale of tyres
63319 Sale of other new motor vehicle parts and accessories
63320 Sale of used motor vehicle parts and accessories
63400 Sale, maintenance and repair of motor cycles and related parts and accessories
63500 Retail sale of automotive fuel
64101 Hotels, motels, botels and inns registered with the SA Tourism Board
64102 Caravan parks and camping sites
64103 Guest-houses and guest-farms
64109 Other accommodation n.e.c.
64201 Restaurants or tearooms with liquor licence
64202 Restaurants or tearooms without liquor licence
64203 Take-away counters
64204 Caterers
64209 Other catering services n.e.c.

7 Transport, storage and communication

- 71111 Inter-urban railway transport
- 71112 Railway commuter services
- 71211 Urban, suburban and inter-urban bus and coach passenger lines
- 71212 School buses
- 71221 Taxis
- 71222 Safaris and sightseeing bus tours
- 71229 Other passenger road transport, including the renting of passenger motor vehicles with drivers
- 71231 Transport of furniture by road
- 71239 Other freight transport by road
- 71300 Transport via pipelines
- 72111 Coastal shipping
- 72112 Ocean shipping
- 72200 Inland water transport
- 73000 Air transport
- 74110 Cargo handling
- 74120 Storage and warehousing
- 74131 Parking garages and parking lots
- 74132 Salvaging of distressed vessels and cargoes
- 74133 Maintenance and operation of harbour works, lighthouses, etc., pilotage
- 74134 Operation of airports, flying fields and air navigation facilities
- 74135 Operation of roads and toll roads
- 74139 Other supporting transport activities n.e.c.
- 74140 Travel agency and related activities
- 74190 Activities of other transport agencies
- 75110 National postal activities
- 75120 Courier activities other than national postal activities
- 75200 Telecommunications

8 Financial intermediation, insurance, real estate and business services

- 81110 Central banking
- 81121 Discount houses and commercial and other banking
- 81122 Building society activities
- 81910 Lease financing
- 81920 Other credit granting
- 81990 Other financial intermediation n.e.c.
- 82110 Life insurance
- 82120 Pension funding
- 82130 Medical aid funding
- 82190 Other insurance n.e.c.
- 83110 Administration of financial markets
- 83120 Security dealing activities
- 83190 Activities auxiliary to financial intermediation n.e.c.
- 83200 Activities auxiliary to insurance and pension funding
- 84110 Property owning and letting
- 84120 Developing real estate, subdividing real estate into lots and residential development on own account
- 84130 Owning and/or sale of own fixed property
- 84210 Activities of estate agencies, rent collectors, appraisers and valuers
- 84220 Subletting of fixed property
- 85110 Renting of land transport equipment

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85120 Renting of water transport equipment
85130 Renting of air transport equipment
85210 Renting of agricultural machinery and equipment
85220 Renting of construction and civil engineering machinery and equipment
85230 Renting of office machinery and equipment (including computers)
85290 Renting of other machinery and equipment n.e.c.
85300 Renting of personal and household goods n.e.c.
86100 Hardware consultancy
86200 Software consultancy and supply
86300 Data processing
86400 Data base activities
86500 Maintenance and repair of office, accounting and computing machinery
86900 Other computer related activities
87110 General research
87120 Agricultural and livestock research
87130 Medical and veterinary research
87140 Industrial research
87190 Other research n.e.c.
88111 Activities of attorneys, notaries and conveyancers
88112 Activities of advocates
88121 Activities of accountants and auditors registered in terms of the Public Accountants and Auditors Act
88122 Activities of cost and management accountants
88123 Bookkeeping activities, including relevant data processing and tabulating activities
88130 Market research and public opinion polling
88140 Business and management consultancy activities
88211 Consulting engineering activities
88212 Architectural activities
88213 Activities of quantity surveyors
88214 Activities of land surveyors
88215 Geological and prospecting activities on a fee or contract basis
88216 Activities of non-registered architects, e.g. tracers and draughts-men of plans for dwellings
88220 Other activities - engineering and other commercial research, developing and testing
88311 Activities of advertising agents
88312 Signwriting and industrial and commercial artistry
88319 Other activities - window-dressing, etc.
88911 Activities of employment agencies and recruiting organisations
88912 Hiring out of workers (labour-broking activities)
88920 Investigation and security activities
88930 Building and industrial plant cleaning activities
88940 Photographic activities
88950 Packaging activities
88991 Credit rating agency activities
88992 Debt collecting agency activities
88993 Stenographic, duplicating, addressing, mailing list and similar activities
88999 Other business activities n.e.c.

9 Community, social and personal services

91101 Government departments
91102 Provincial administrations
91103 Self-governing territories and their lower authorities
91109 Other Central Government activities

91200 Regional services council activities
 91300 Local authority activities
 92001 Pre-primary education and activities of after-school centres
 92002 Primary and secondary education
 92003 Special education and training of mentally retarded children
 92004 Education by technical colleges and technical institutions
 92005 Education by Technikons
 92006 Education by teachers' training colleges of education for further training
 92007 Education by universities
 92008 Education by correspondence and private vocational colleges
 92009 Other educational services - own account teachers, motor vehicle driving schools/tutors and music, dancing and other art schools, etc.
 93111 General hospitals
 93112 Maternity homes
 93113 Tuberculosis hospitals
 93114 Psychiatric hospitals
 93115 Detached operation theatres
 93119 Other hospitals, n.e.c.
 93121 Medical practitioner and specialist activities
 93122 Dentist and specialist dentist activities
 93191 Supplementary health services or paramedical staff (practitioners)
 93192 Clinics and related health care services
 93193 Nursing services
 93194 Chiropractors and other associated health care services
 93199 Other health services
 93200 Veterinary activities
 93300 Social work activities
 95110 Activities of business and employers' organisations
 95120 Activities of professional organisations
 95200 Activities of trade unions
 95910 Activities of religious organisations
 95920 Activities of political organisations
 95990 Activities of other membership organisations n.e.c.
 96111 Motion picture and video production and distribution
 96112 Related activities - film and tape renting to other industries, booking, delivery and storage
 96121 Motion picture projection by cinemas
 96122 Motion picture projection by drive-in cinemas
 96130 Radio and television activities
 96140 Dramatic arts, music and other arts activities
 96190 Other entertainment activities n.e.c.
 96310 Library and archives activities
 96320 Museum activities and preservation of historical sites and buildings
 96330 Botanical and zoological gardens and nature reserve activities
 96410 Sporting activities
 96490 Other recreational activities
 99010 Washing and (dry-) cleaning of textiles and fur products
 99021 Men's hairdressing
 99022 Ladies' hairdressing
 99023 Men's and ladies' hairdressing
 99024 Beauty treatment
 99030 Funeral and related activities
 99090 Other service activities n.e.c.

10 Private household extraterritorial organisations, representatives of foreign governments and other activities not adequately defined


01000 Private households with employed persons
02000 Extraterritorial organisations
03000 Representatives of foreign governments
09000 Other activities not adequately defined

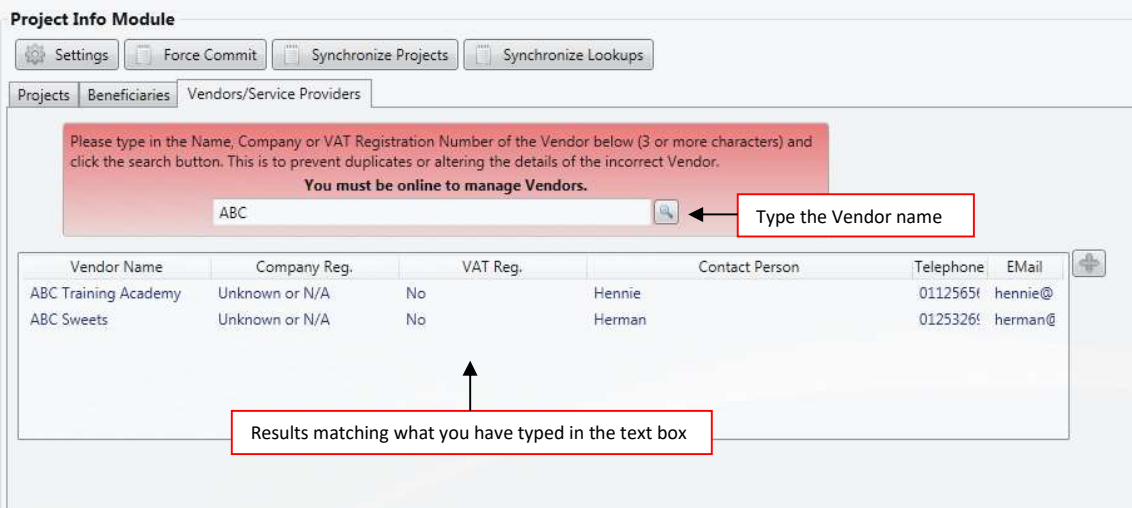
9.1.5. Supporting Documents Upload

If applicable a copy of BBEE certificate, affidavit(s), CIDB certificate and/or partnership agreement must be uploaded:

- High quality with no special effects;
- Clearly readable;
- Size: Not bigger than 2MB
- Format: jpeg, pdf

9.2. Edit for a Vendor / Service Provider

- Click on the Vendors / Service Providers Tab
- Enter the Vendor name in the Text field
- Click on the Search icon 




Project Info Module

Settings Force Commit Synchronize Projects Synchronize Lookups

Projects Beneficiaries Vendors/Service Providers

Please type in the Name, Company or VAT Registration Number of the Vendor below (3 or more characters) and click the search button. This is to prevent duplicates or altering the details of the incorrect Vendor.

You must be online to manage Vendors.

ABC 

Type the Vendor name


Vendor Name	Company Reg.	VAT Reg.	Contact Person	Telephone	E-Mail
ABC Training Academy	Unknown or N/A	No	Hennie	01125651	hennie@
ABC Sweets	Unknown or N/A	No	Herman	01253261	herman@

Results matching what you have typed in the text box

Figure 70: Search for a vendor

- You may get a few results matching what you have typed in
- Click on a Vendor, make the required changes and click on Save to save
- Click on synchronize lookups to update your dropdowns

9.3. Link existing Vendor / Service Provider to a project


- Click on the Vendors / Service Providers Tab
- Enter the Vendor name in the Text field
- Click on the Search icon 

Project Info Module

Settings Force Commit Synchronize Projects Synchronize Lookups

Projects Beneficiaries Vendors/Service Providers

Please type in the Name, Company or VAT Registration Number of the Vendor below (3 or more characters) and click the search button. This is to prevent duplicates or altering the details of the incorrect Vendor.
You must be online to manage Vendors.

ABC  Type the Vendor name

Vendor Name	Company Reg.	VAT Reg.	Contact Person	Telephone	E-Mail
ABC Training Academy	Unknown or N/A	No	Hennie	01125651	hennie@
ABC Sweets	Unknown or N/A	No	Herman	01253261	herman@

Results matching what you have typed in the text box

Figure 71: Search for a vendor

- You may get a few results matching what you have typed in
- Click on the Vendor and go to the Projects tab

Add Vendor

Vendor Details BBBEE Vendor Equity Details Projects CIDB

Project No	Service Provider Type	Linked to Vendor	CPG Vendor	App Date

Project No :

Service Provider Type :

Linked to Vendor :

☐ : CPG Vendor

Appointment Date : 15

Add

Save Cancel

Figure 72: Link vendor to a project

- Select the required fields from the dropdown:
 - Project No:** This is the project number the vendor must be linked to
 - Service Provider Type:** A vendor can be any one of the following types: Consultant, Contractor, Sub-contractor or Supplier
 - Linked to Vendor:** If the vendor type is set to Sub-contractor or Supplier then the vendor must be linked to the vendor that they are a sub-contractor or supplier of. This is important to calculate the CPG correctly.
 - CPG Vendor:** Select this checkbox if the vendor was appointed under the 14-point plan and must be included in the CPG calculations

- **Tender Closure Date:** If this vendor was appointed under the 14-point plan and the CPG vendor checkbox has been selected then the tender closure date under which this vendor was appointed, must be captured. When this date is set the system will check if a BBBEE certificate for this date has been uploaded. If not it will be required that the BBBEE certificate/affidavit that was valid at closing date of tender/quotation, to be uploaded. See 9.1.3 BBBEE Certificate for more information on how to upload a BBBEE certificate.

- vii. Click on Add
- viii. Click on synchronize lookups to update your dropdowns

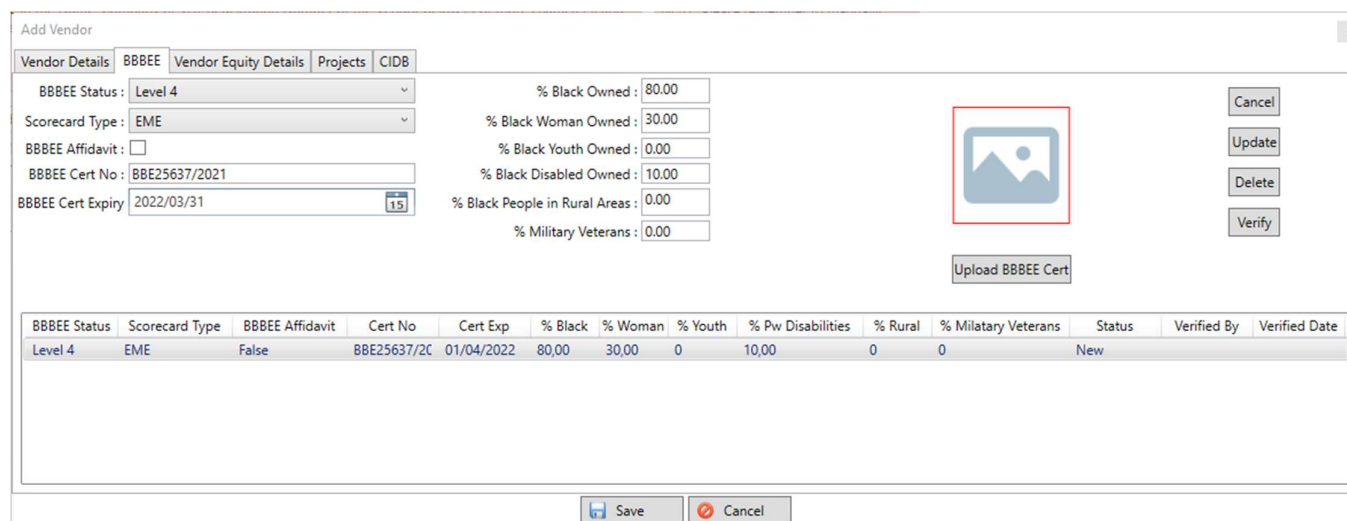
SELF HELP: Don't see the project on the project list, then please check the following:

- Click on Synchronize Projects (Figure 11 No 3) to update your project list
- Restart your software
- If all the above are correct, then please create your issue on the [Service Desk Website](#) with the relevant project number

9.4. Verify Vendor Information

Before a vendor can be used to capture expenditure and training data the vendors BBBEE and CIDB information must be verified. The vendor's information must only be verified once and after each change made to the vendor's BBBEE and CIDB information. The following data must be verified by the Contracts Engineer (CE) or Resident Engineer (RE):

i. BBBEE information



BBBEE Status	Scorecard Type	BBBEE Affidavit	Cert No	Cert Exp	% Black	% Woman	% Youth	% Pw Disabilities	% Rural	% Military Veterans	Status	Verified By	Verified Date
Level 4	EME	False	BBE25637/2021	01/04/2022	80,00	30,00	0	10,00	0	0	New		

Figure 73: BBBEE tab

- BBBEE status
- Scorecard Type
- BBBEE Certificate or Affidavit
- BBBEE Certificate Number
- BBBEE Certificate or Affidavit Expiry date
- Ownership %
- Uploaded BBBEE certificate or affidavit

ii. CIDB information


Add Vendor

Vendor Details | BBBEE | Vendor Equity Details | Projects | **CIDB**

CIDB Grading : CE CIDB Level : Level 2

CIDB Cert No : CW459/89/2012

CIDB Expiry : 2022/02/10



Upload CIDB Cert

Cancel
Update
Delete
Verify

CIDB Grading	CIDB Level	CIDB Cert No	CIDB Expiry	Status	Verified By	Verified Date
CE	Level 2	CW459/89/2012	10/02/2022	New		

Save Cancel

Figure 74: CIDB tab

- CIDB Grading
- CIDB Level
- CIDB Certificate Number
- CIDB Certificate Expiry Date
- Uploaded CIDB certificate

A vendor's BBBEE and CIDB information can be verified by the CE/RE in two ways:

9.4.1. Method 1


- Open the Vendors/Service Providers tab
- Search for the vendor using the company name, registration or VAT number
- Click on the vendor in the search result grid
- Click on the BBBEE or CIDB tab

Add Vendor

Vendor Details | **BBBEE** | Vendor Equity Details | Projects | CIDB

BBBEE Status: Level 4
Scorecard Type: EME
BBBEE Affidavit: ☐
BBBEE Cert No: BBE25637/2021
BBBEE Cert Expiry: 2022/03/31

% Black Owned: 80.00
% Black Woman Owned: 30.00
% Black Youth Owned: 0.00
% Black Disabled Owned: 10.00
% Black People in Rural Areas: 0.00
% Military Veterans: 0.00


Upload BBBEE Cert

Cancel
Update
Delete
Verify

BBBEE Status	Scorecard Type	BBBEE Affidavit	Cert No	Cert Exp	% Black	% Woman	% Youth	% Pw Disabilities	% Rural	% Military Veterans	Status	Verified By	Verified Date
Level 4	EME	False	BBE25637/20	01/04/2022	80,00	30,00	0	10,00	0	0	New		


Save Cancel

Figure 75: BBBEE information

Add Vendor

Vendor Details | BBBEE | Vendor Equity Details | Projects | **CIDB**

CIDB Grading: CE
CIDB Level: Level 2
CIDB Cert No: CW459/89/2012
CIDB Expiry: 2022/02/10


Upload CIDB Cert

Cancel
Update
Delete
Verify

CIDB Grading	CIDB Level	CIDB Cert No	CIDB Expiry	Status	Verified By	Verified Date
CE	Level 2	CW459/89/2012	10/02/2022	New		

Save Cancel

Figure 76: CIDB information

- v. Click on the certificate the must be verified
- vi. Ensure that all the data is captured correctly, make the required changes, or request the capture user to make the required changes. If all the data is correct, then click on Verify

NOTE: You must online to be able to verify the vendor / service provider information.

9.4.2. Method 2

- i. Open the Verify Beneficiary/Vendors Tab

Project Info Module

Settings Force Commit Synchronize Projects Synchronize Lookups Import Expenditure

Projects Beneficiaries Vendors/Service Providers **Verify Beneficiaries/Vendors**

Type Keyword Amount of Rows to show: Refresh List

BBBEE/ CIDB to Verify

VENDOR NAME	COMPANY REG.	CERT NO	CERT EXPIRY	VERIFY TYPE
Smeezyomuhle Trading En	2018/231205/07		01/12/2021	BBBEE
Candy Bar Salon B3 and G	MAAA0980986		17/11/2021	BBBEE
Environmental Assessment	2020/178799/07		30/10/2021	BBBEE
LABCO (PTY) LTD	2005/006835/07	21345674321	06/04/2022	CIDB
SMEC South Africa	1989/007013/07	123123	10/08/2022	CIDB
SABC	2003/023915/06	65987	29/10/2021	CIDB
		1234567890-09876543	27/10/2021	CIDB
		214141241	29/10/2021	CIDB

Figure 77: Verify Beneficiary/Vendor tab

NOTE: This tab can only be accessed by the RE/CE on a project

Type Keyword Amount of Rows to show: Refresh List

BBBEE/ CIDB to Verify

VENDOR NAME	COMPANY REG.	CERT NO	CERT EXPIRY	VERIFY TYPE
Smeezyomuhle Trading En	2018/231205/07		01/12/2021	BBBEE
Candy Bar Salon B3 and G	MAAA0980986		17/11/2021	BBBEE
Environmental Assessment	2020/178799/07		30/10/2021	BBBEE
LABCO (PTY) LTD	2005/006835/07	21345674321	06/04/2022	CIDB
SMEC South Africa	1989/007013/07	123123	10/08/2022	CIDB
SABC	2003/023915/06	65987	29/10/2021	CIDB
		1234567890-09876543	27/10/2021	CIDB
		214141241	29/10/2021	CIDB

Figure 78: List of vendors that must be verified

- ii. On the Verify Beneficiaries/Vendors tab you will see all the vendors that must be verified. By default, the list will only return 10 records for verification. This can be changed by selecting the number of rows in the amount of Rows to show dropdown, then click on refresh list.
- iii. Click on the vendor in the search result grid

