



# **Integrated Transport Information System**

## **ITIS Desktop Project Information Module - User Manual**

**October 2025**

## Documentation Details

This document was developed for the South African National Road Agency (SANRAL). For content revisions, questions, or comments, contact the writer at [itisissues@nra.co.za](mailto:itisissues@nra.co.za).

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## Revision History

Revision	Description of Change	Author	Effective Date
0	Initial Release	M Wilgenbus	April 2013
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
4	Vendor Equity and overall update	M Wilgenbus	April 2016
5	Additional information required for dep of public works	K Niebuhr	April 2017
6	AG requirement software update	K Niebuhr	Jan 2022
7	Data Verification, Invoice, Timesheet and PoP	K Niebuhr	Feb 2024
8	OCR, Timesheet update, Minutes and Payment cert upload	K Niebuhr	March 2025
9	User Manual enhancements	K Niebuhr	May 2025
10	Updating Screens & Layout	W Liebenberg	Oct 2025

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## Technical Support

For technical support please send an email to ITIS Support at [itisissues@nra.co.za](mailto:itisissues@nra.co.za). The email needs to contain a short description of the problem in the Subject field. Please note that emails without a subject will be rejected. In the body of the email please describe your problem and provide your contact details.

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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 Desk Top> ITIS Desk Top; or
2. Double click on the ITIS Desk Top 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

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:

- i. Registration Management
- ii. User Management
- iii. Product Management
- iv. Download User Manuals

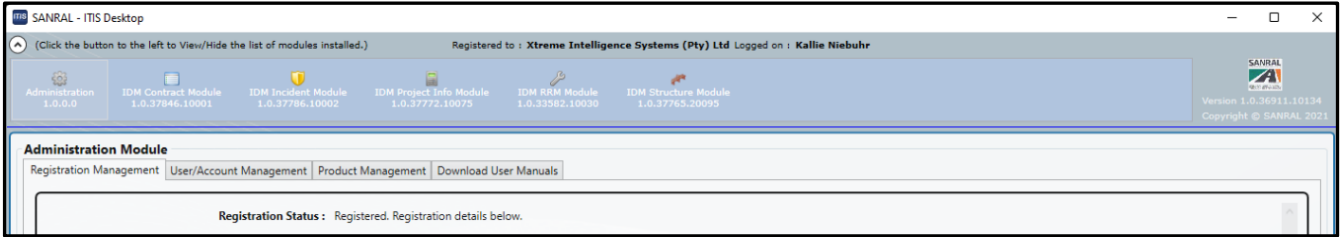


Figure 1: Administration Module

#### 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>

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

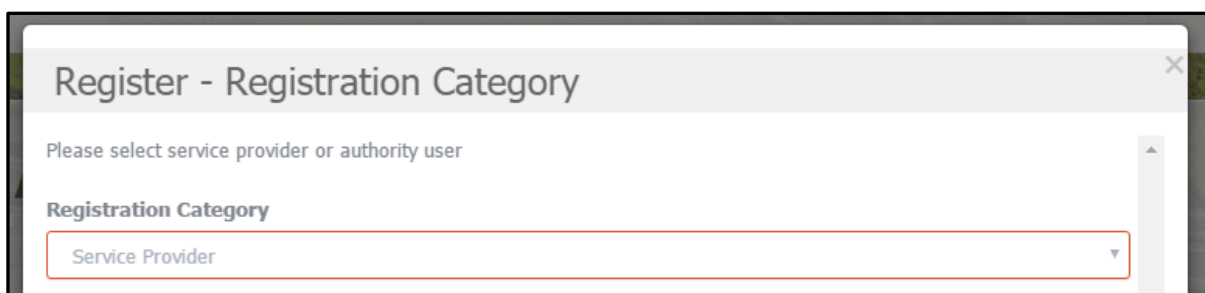


Figure 2: Registration Category

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

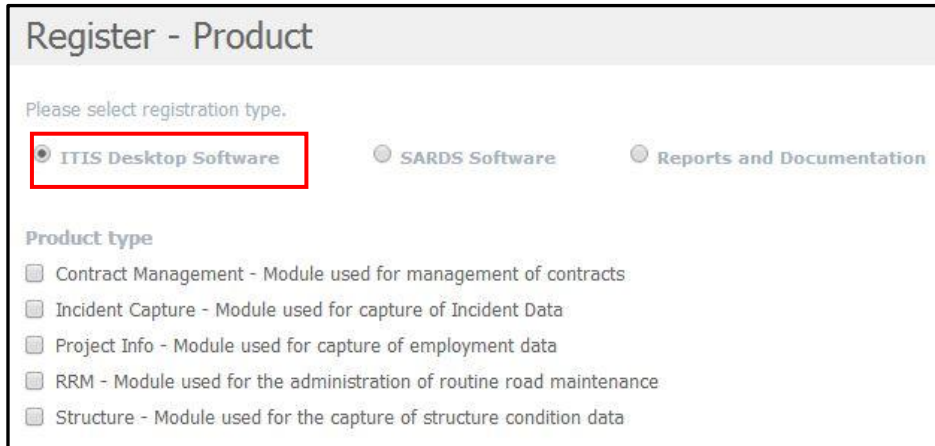


Figure 3: Product Information

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

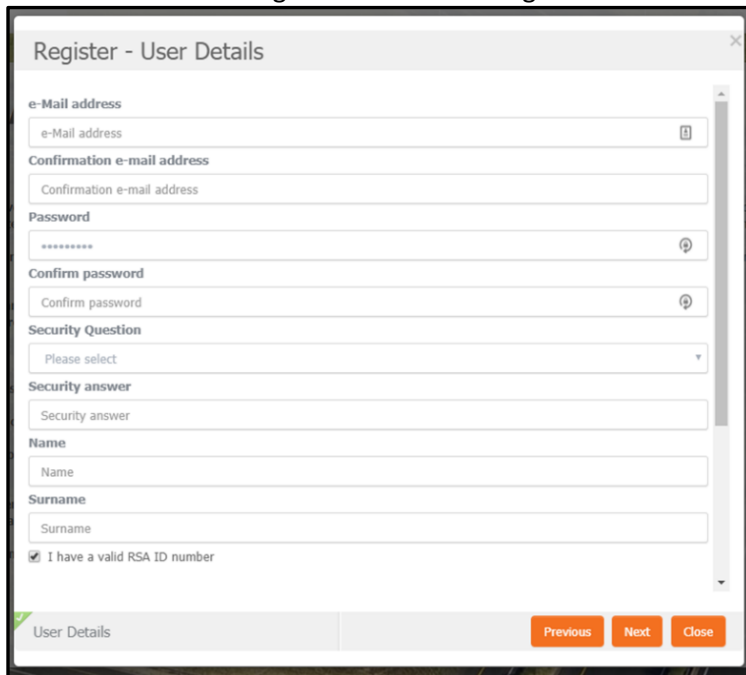


Figure 4: User Details

- **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

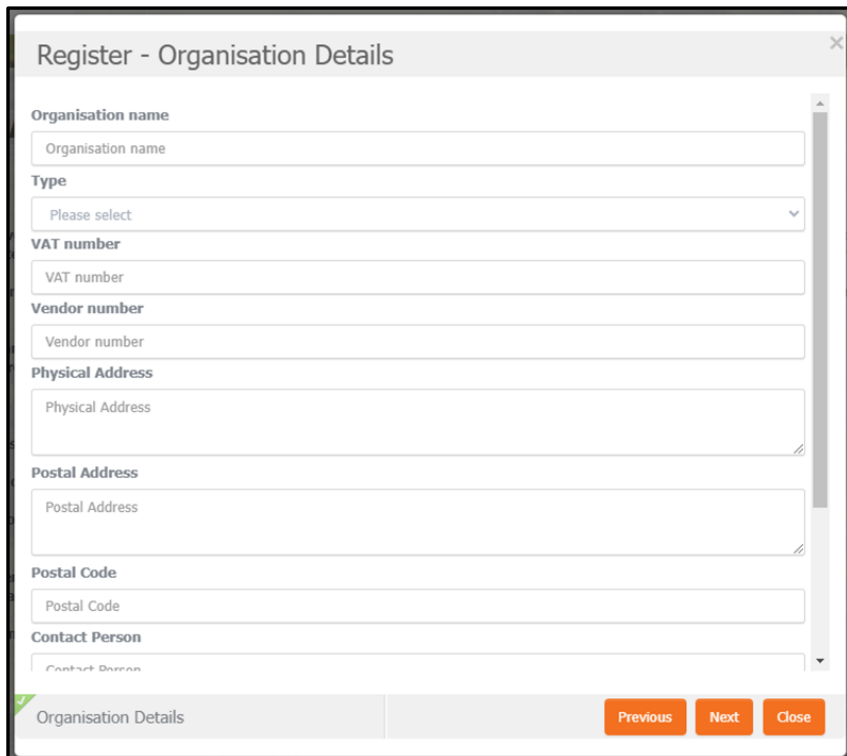
v. Click on Next

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". The form contains the following fields and controls:

- Organisation name:** A text input field.
- Type:** A dropdown menu with "Please select" as the current selection.
- VAT number:** A text input field.
- Vendor number:** A text input field.
- Physical Address:** A text input field.
- Postal Address:** A text input field.
- Postal Code:** A text input field.
- Contact Person:** A dropdown menu.

At the bottom of the form, there are three buttons: "Previous", "Next", and "Close". The "Next" button is highlighted in orange.

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 Next

x. On the project details page capture your project number in the enter project section, then select the project from the select project dropdown

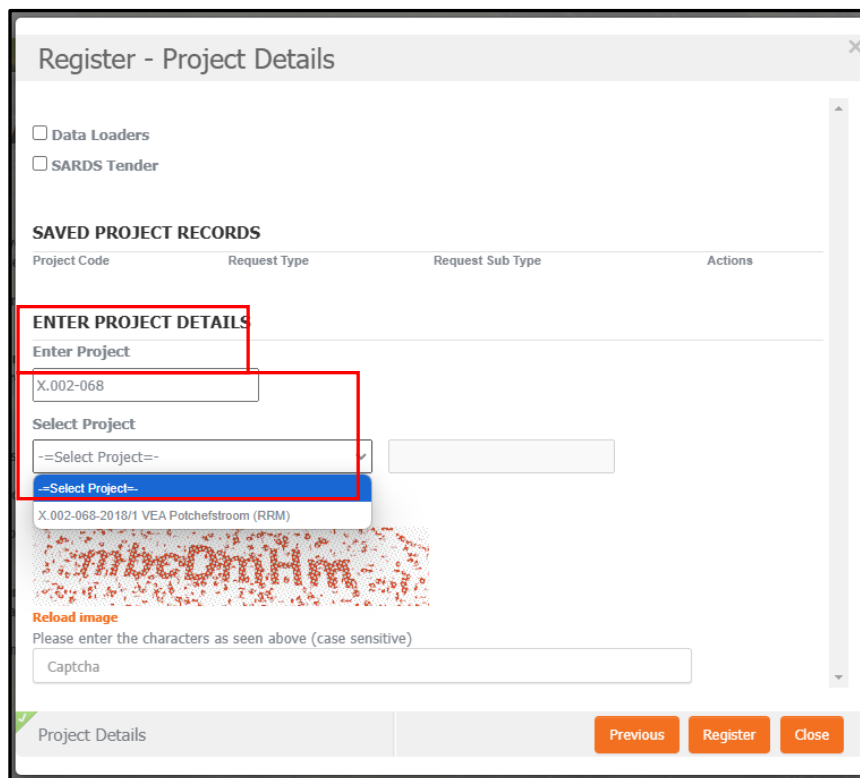


Figure 6: Project Details

- xi. Once you have your project selected, proceed to select your user type. The user type depends on who you work for: Do you work for the consultant, contractor or a subcontractor?
- xii. Select the sub-user type from the dropdown. The sub-user type represents the role you fulfil on the project.

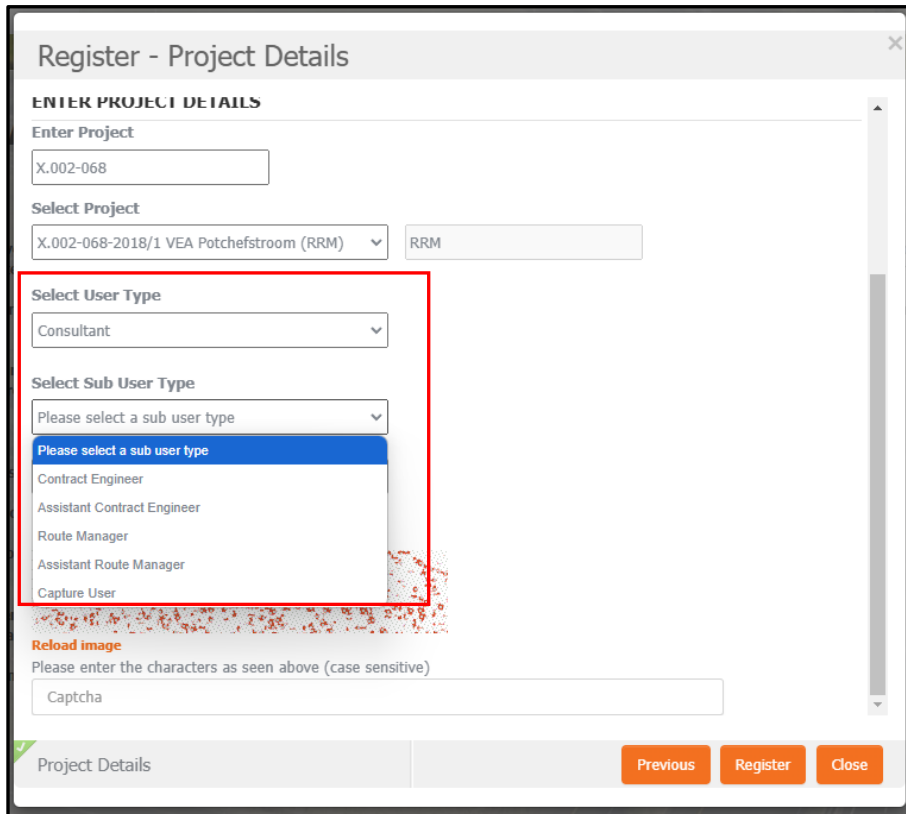
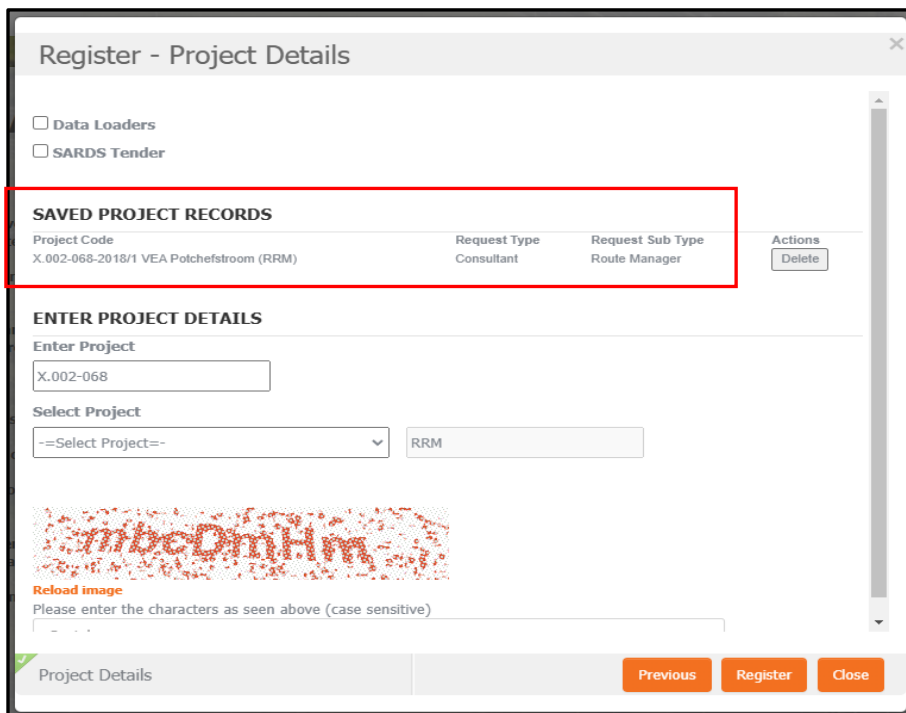


Figure 7: User Type


- xiii. Click on Add. This will add the project to the saved project list. Repeat step x. – xii. to add additional projects.



Project Code	Request Type	Request Sub Type	Actions
X.002-068-2018/1 VEA Potchefstroom (RRM)	Consultant	Route Manager	Delete

Figure 8: List of Projects the user request access too

- xiv. Click on Register
- xv. Clicking on Register will send a verification email to the email address you specified. Open the email and click on the email verification link.

	<b>Integrated Transport Information System</b>	Document #:	Rev.:
	Title: <b>ITIS Desktop Project Information Module – User Manual</b>		9

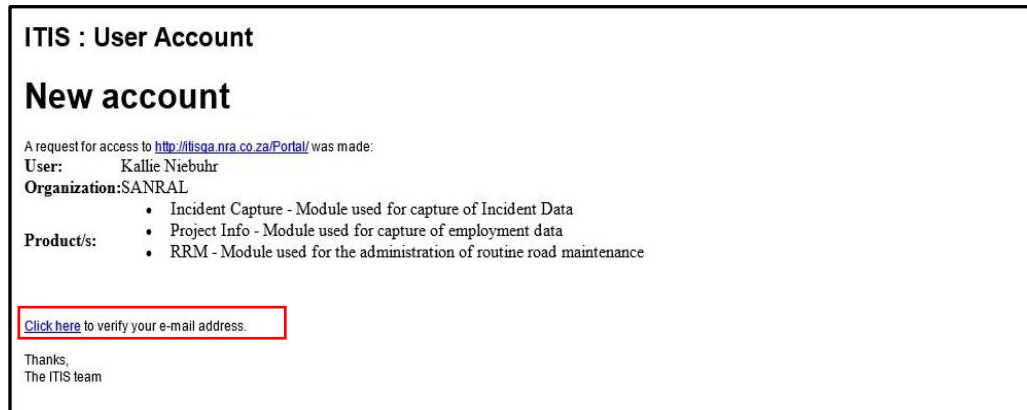


Figure 9: Verification Email

- xvi. 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

- To update your software simply click on *Synchronize and Check for Updates*.
- If there is an update available for download click on Yes.
- 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
- 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*.

### 3.5. User Manual Downloads

Use this tab to download all Desktop 1 User Manuals. Please note that you have to be online to be able to download and view the user manuals.

## 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.

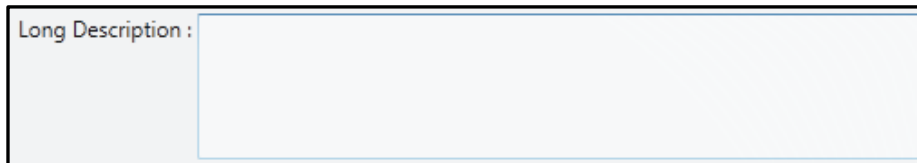


Figure 10: Text Box

### 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.

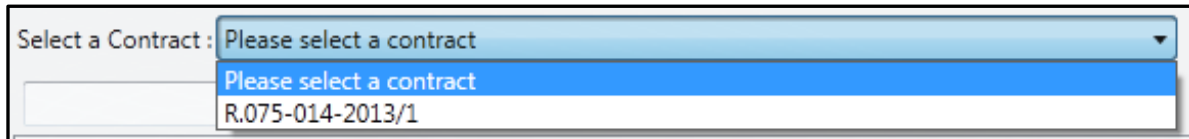


Figure 11: Dropdown

### 4.3. Check Box

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

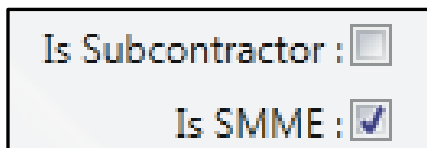



Figure 12: Check Box

### 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.

Base Date : 30 September 2008 


Start Date : 30 November 2008 

Figure 13: 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 14: PIM Module

1. **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 Synchronised manually.
2. **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.
3. **Synchronise 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.
4. **Synchronise Lookups:** Click this button to synchronize all the lookups. Lookups are used in dropdowns.
5. **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 14: No 11).
6. **Synchronisation:** Click this option to synchronize the selected project.

7. **Projects:** Click on this tab to capture project data, like estimates, expenditure, employment and training and other project related data.
8. **Beneficiaries:** Click on this tab to capture beneficiary information.
9. **Vendors/Service Providers:** Click on this tab to capture vendor/service provider information.
10. **Project List:** After synchronizing projects, all projects you have access to will appear on the project list.
11. **Estimates:** Click on this tab to capture the selected projects estimates.
12. **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. **Proof of Payment:** Click on this tab to upload the monthly proof of payments
15. **Timesheet:** Click on this tab to upload the monthly timesheets.
16. **Photo:** Click on this tab to upload project photos for the selected project
17. **Reports:** Click on this tab to download and view project reports.
18. **Contractor Performance:** Use this tab to capture the contractor's performance review.
19. **Site Minutes:** Use this tab to upload monthly site minute reports.
20. **Payment Certificates:** Use this tab to upload monthly payment certificates.
21. **Month/Year Grid:** Use this grid to select the applicable month for the relevant year, to capture estimates, expenditure, employment and training data.
22. **Data Window:** PIM data capture forms.

---

## 6. Synchronise & Commit

### 6.1. Synchronise Lookups

Click on this button to synchronise your data lookups, should any lookup values have changed then this will fetch the latest values form the server (See Figure 14: No 4).

### 6.2. Synchronise 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 14: 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 14: 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.

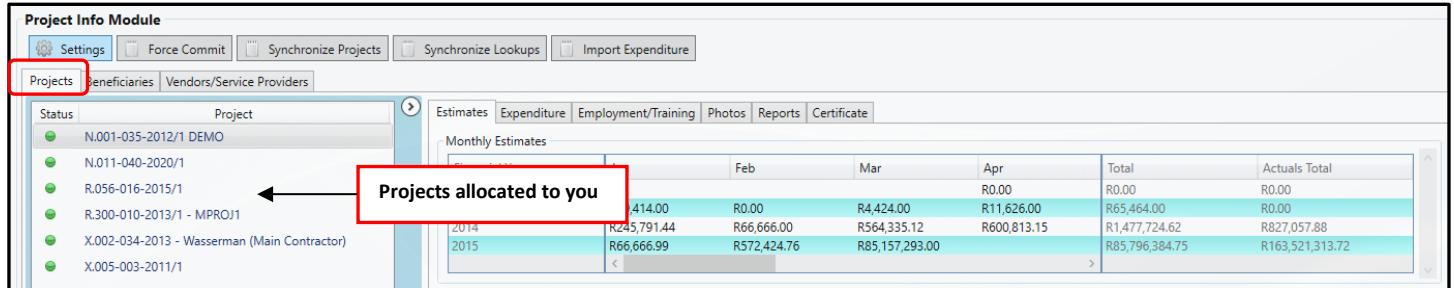





Figure 15: Projects Tab

### 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 [itisissues@nra.co.za](mailto:itisissues@nra.co.za) 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

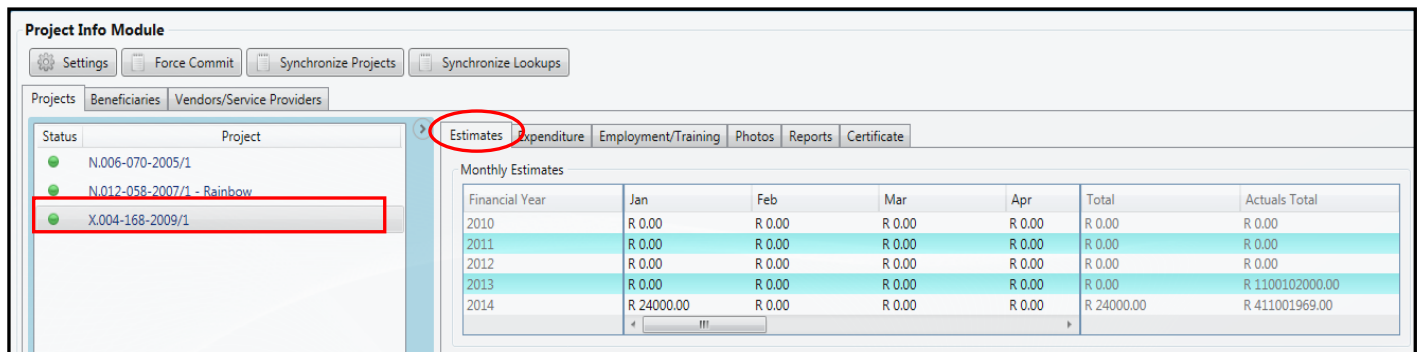
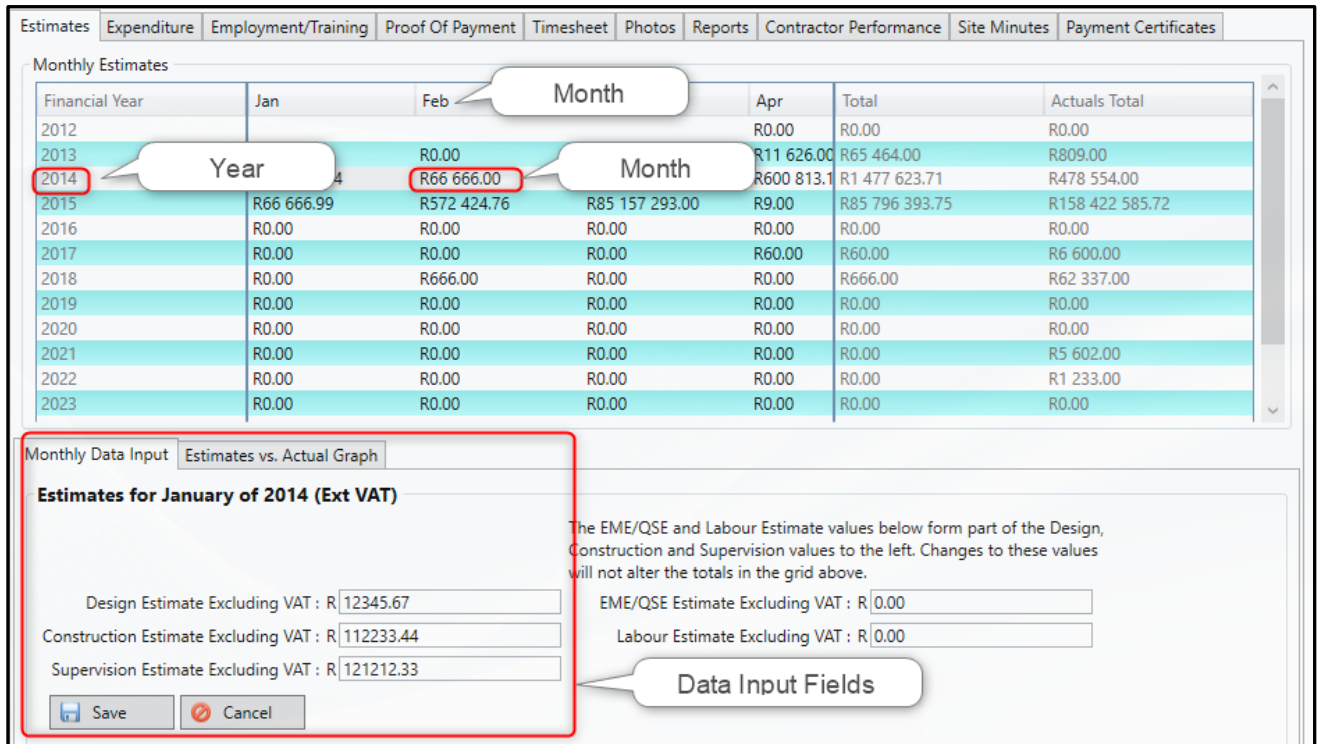


Figure 16: Project Estimates

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

- Click on Synchronize Projects (Figure 14 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



The screenshot displays the 'Monthly Estimates' grid and the 'Monthly Data Input' form. The grid shows estimates for various years and months. The 'Monthly Data Input' form is open for January 2014, showing fields for Design Estimate, Construction Estimate, Supervision Estimate, EME/QSE Estimate, and Labour Estimate, all excluding VAT. A callout box labeled 'Data Input Fields' points to these input fields.

Financial Year	Jan	Feb	Mar	Apr	Total	Actuals Total
2012				R0.00	R0.00	R0.00
2013		R0.00		R11 626.00	R65 464.00	R809.00
2014	R66 666.99	R66 666.00		R600 813.11	R1 477 623.71	R478 554.00
2015	R66 666.99	R572 424.76	R85 157 293.00	R9.00	R85 796 393.75	R158 422 585.72
2016	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00
2017	R0.00	R0.00	R0.00	R60.00	R60.00	R6 600.00
2018	R0.00	R666.00	R0.00	R0.00	R666.00	R62 337.00
2019	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00
2020	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00
2021	R0.00	R0.00	R0.00	R0.00	R0.00	R5 602.00
2022	R0.00	R0.00	R0.00	R0.00	R0.00	R1 233.00
2023	R0.00	R0.00	R0.00	R0.00	R0.00	R0.00

**Monthly Data Input** | Estimates vs. Actual Graph

**Estimates for January of 2014 (Ext VAT)**

The EME/QSE 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.

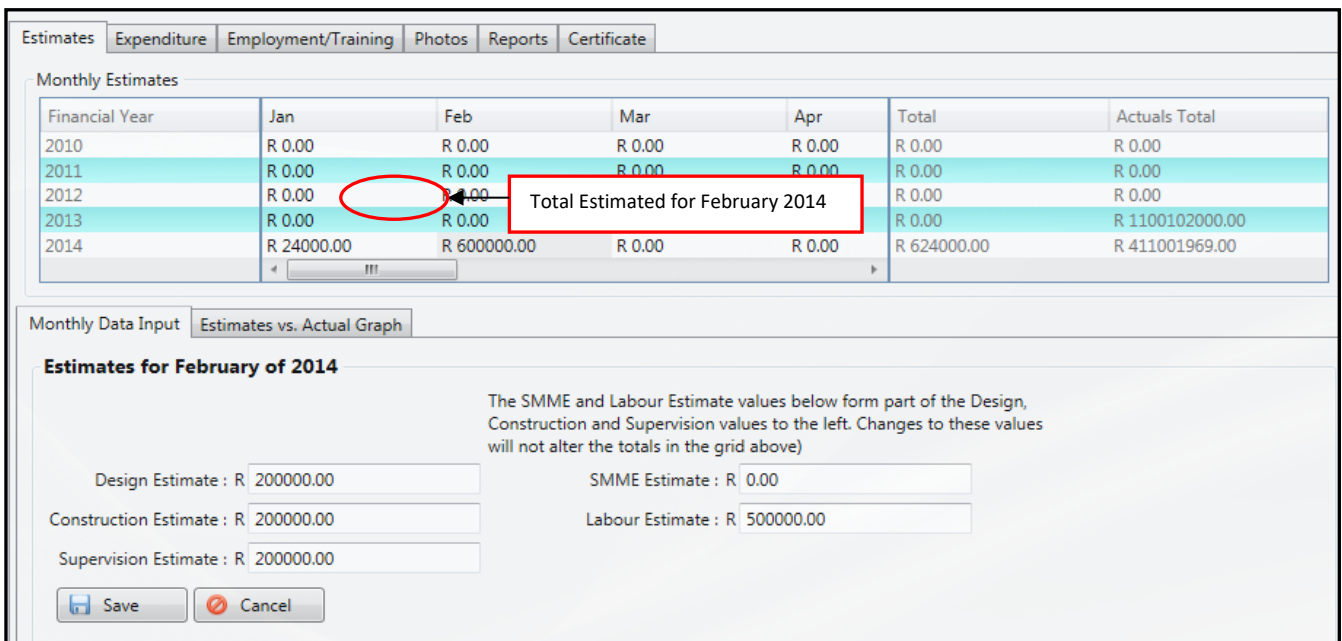
Design Estimate Excluding VAT : R 12345.67  
 Construction Estimate Excluding VAT : R 112233.44  
 Supervision Estimate Excluding VAT : R 121212.33  
 EME/QSE Estimate Excluding VAT : R 0.00  
 Labour Estimate Excluding VAT : R 0.00

Save | Cancel

Figure 17: 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 14 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:



The screenshot displays the 'Monthly Estimates' grid and the 'Monthly Data Input' form. The grid shows estimates for various years and months. The 'Monthly Data Input' form is open for February 2014, showing fields for Design Estimate, Construction Estimate, Supervision Estimate, SMME Estimate, and Labour Estimate, all excluding VAT. A callout box labeled 'Total Estimated for February 2014' points to the February 2014 cell in the grid.

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

**Monthly Data Input** | Estimates vs. Actual Graph

**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

Save | Cancel

Figure 18: Captured Estimate

**7.2.2. Edit Estimates**

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

**7.3. Project Expenditure**

**7.3.1. Add Expenditure**

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

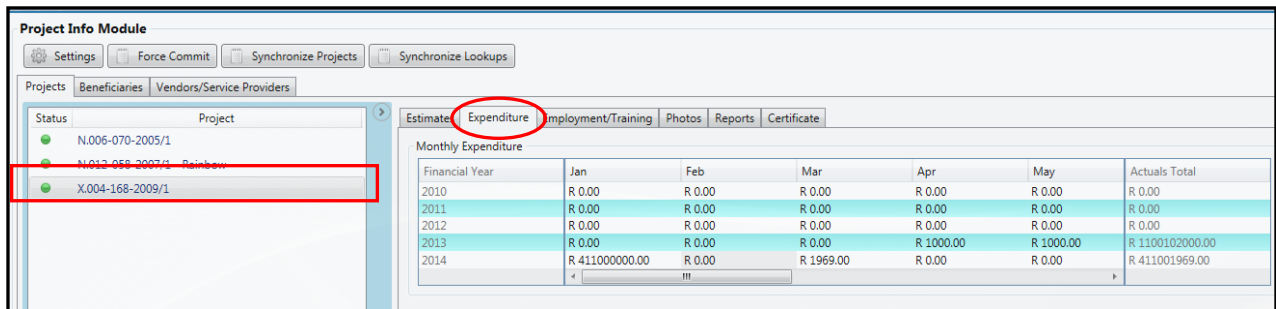


Figure 19: Project Expenditure

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

- Click on Synchronize Projects (Figure 14 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:

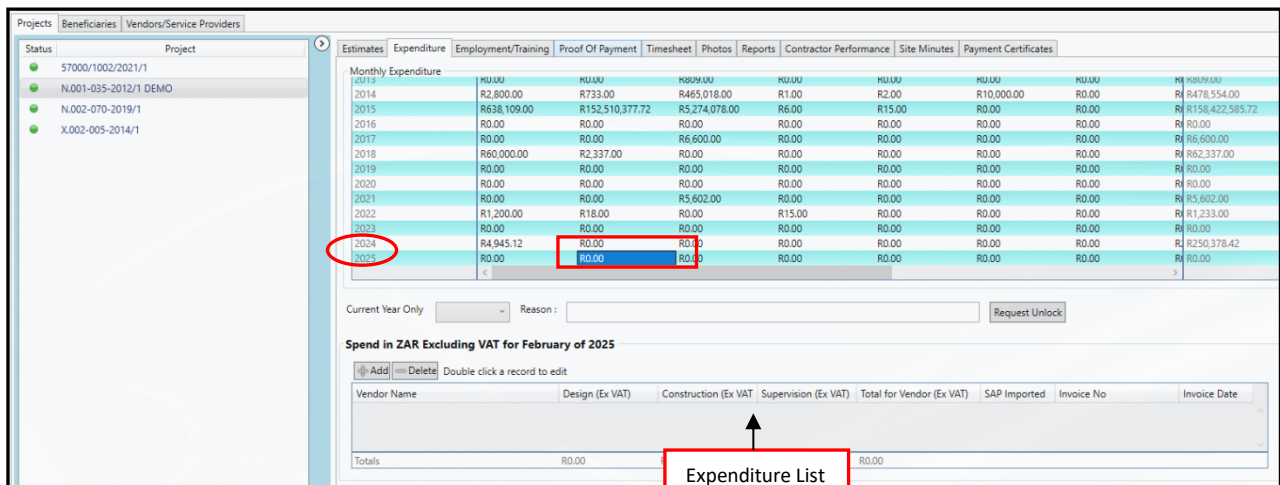


Figure 20: Project Month

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

Figure 21: 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 14 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 22: Vendor with validation errors

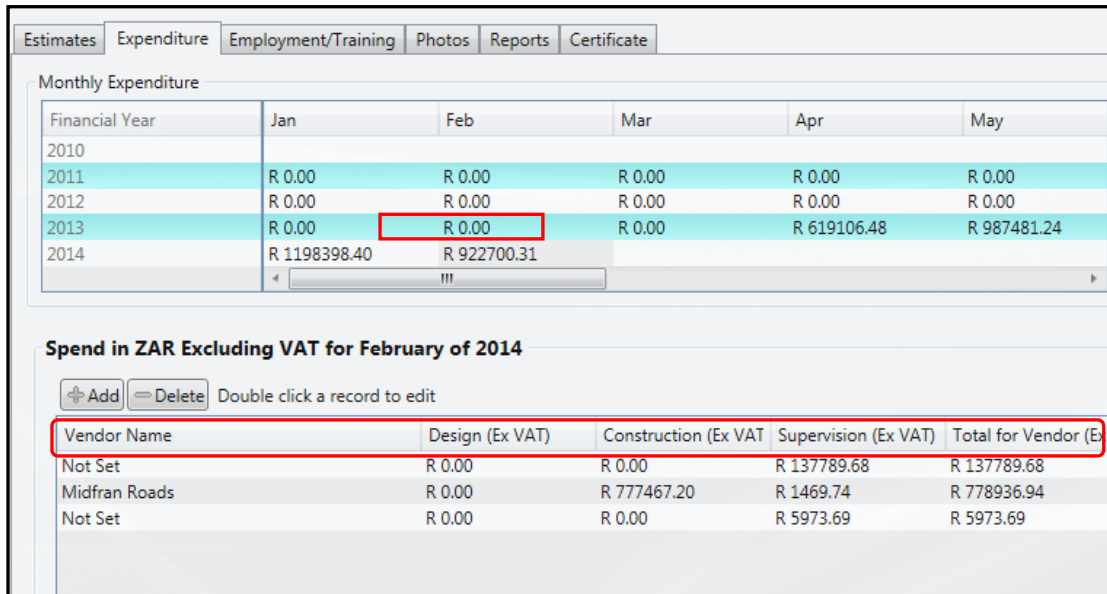
- v. Capture the Invoice Number, Invoice Date and upload a copy of the invoice.
- vi. Add your figures excluding VAT to the remaining 3 fields and click on Validate.
- vii. Clicking on Validate will verify the information captured against the document uploaded.
- viii. If no errors found, you can continue to save your record.

Figure 23: Expenditure data without errors

- ix. If any errors or discrepancies are found the system will inform you of these errors.

Figure 24: Expenditure data with errors

- x. Please check that your document uploaded is correct and that the data has been captured correctly. You must validate the data three times, if after the third attempt there are still errors, you can request manual verification by clicking on save.
- xi. Once you have clicked on Save the figures will be calculated and the total Expenditure for February will be displayed in the *February* field:



The screenshot shows a software interface with several tabs: Estimates, Expenditure, Employment/Training, Photos, Reports, and Certificate. The 'Expenditure' tab is active, displaying a 'Monthly Expenditure' table. Below this table is a section titled 'Spend in ZAR Excluding VAT for February of 2014' with 'Add' and 'Delete' buttons and a note 'Double click a record to edit'. A table below this section lists vendor expenditure details for February 2014.

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			

Vendor Name	Design (Ex VAT)	Construction (Ex VAT)	Supervision (Ex VAT)	Total for Vendor (E)
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 25: 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 19)
- ii. Click on month for the correct year (See Figure 20)
- iii. Double click on the expenditure record you wish to edit.
- iv. Make the require changes and click on Save or Cancel to revert.
- v. Making changes to expenditure will require the software to verify data captured against the document uploaded. If the system was not able to verify the information after three attempts, you will be able to request manual verification.

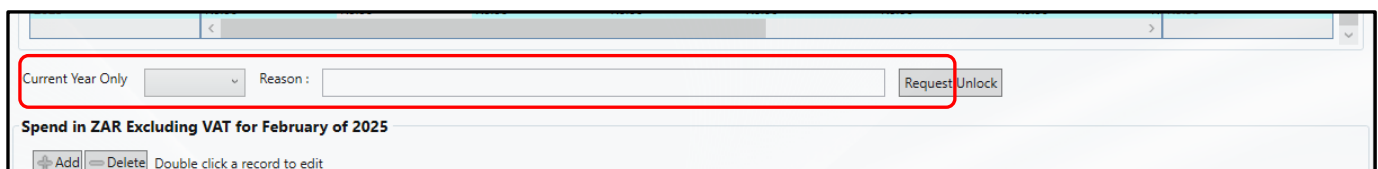
### 7.3.3. Delete Expenditure

- i. To delete Expenditure, click on the relevant project on the left, then click on the Expenditure tab (See Figure 19)
- ii. Click on month for the correct year (See Figure 20)
- iii. Click on the expenditure record you wish to delete and click on Delete.
- iv. The system will confirm your action, click Yes to continue and No to cancel the changes

### 7.3.4. Expenditure Lockdown

The system requires all users to capture their expenditure data within 21 days after the end of each month. After 21 days the month is automatically locked for capturing or editing of any data. If there are any correction or missing data to be captured, follow the steps below.

- i. To edit Expenditure, click on the relevant project on the left, then click on the Expenditure tab (See Figure 19)
- ii. Click on month for the correct year (See Figure 20)
- iii. Select the month required to be unlocked, state the reason for unlocking and click on Request Unlock.



The screenshot shows a form titled 'Request Unlock' with a red border. It contains a dropdown menu for 'Current Year Only', a text input field for 'Reason', and a 'Request Unlock' button. Below the form, there is a section titled 'Spend in ZAR Excluding VAT for February of 2025' with 'Add' and 'Delete' buttons and a note 'Double click a record to edit'.

Figure 26: Unlock request form

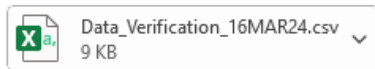
- iv. Clicking on Request Unlock will forward the request to SANRAL for approval.
- v. You will receive an email with confirmation on whether your request was approved or declined.
- vi. After receiving the confirmation email from SANRAL click on Synchronize projects (Figure 14 No 3) to update your software.
- vii. If the request to unlock is approved you will have 5 days to make the necessary updates before the system will lock again.

### 7.3.5. Expenditure Data Verification

As part of the audit requirements all expenditure information must be verified by SANRAL. The following data will be verified by SANRAL:

- **Invoice:** All data captured on the expenditure record will be verified against the uploaded invoice.

If any of the details are not correct the data will be declined with a reason for the decline. A daily email will be sent with all the information of the declined records.



Good day,

Please find attached data to be corrected.  
Attached data has been declined by the Data Verification process.  
Open attachment for more information.

[itisweb@nra.co.za](mailto:itisweb@nra.co.za)

\*\*\*\*  
D: | M:  
[itisweb@nra.co.za](mailto:itisweb@nra.co.za) | [www.sanral.co.za](http://www.sanral.co.za)  
Fraud Hotline Number - 0800 204 558



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Figure 27: Data Verification Email

The above email will be sent to the user that captured the expenditure record.

Please see 7.3.2 Edit expenditure on how to edit and correct the invalid data.



The screenshot shows the 'Add Employment' screen. It features several input fields: 'Beneficiary' (a dropdown menu with 'Select' and a red asterisk), 'Job Type' (a dropdown menu with a red asterisk), 'Days Worked' (a calendar for February 2020), 'Hours Worked' (a text box with a red asterisk), 'Work Opportunities' (a text box with '0'), and 'Gross wage/salary paid for hours worked' (a text box with 'R 0.00' and a red asterisk). At the bottom, there are 'Save' and 'Cancel' buttons.

Figure 30: 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 14 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:

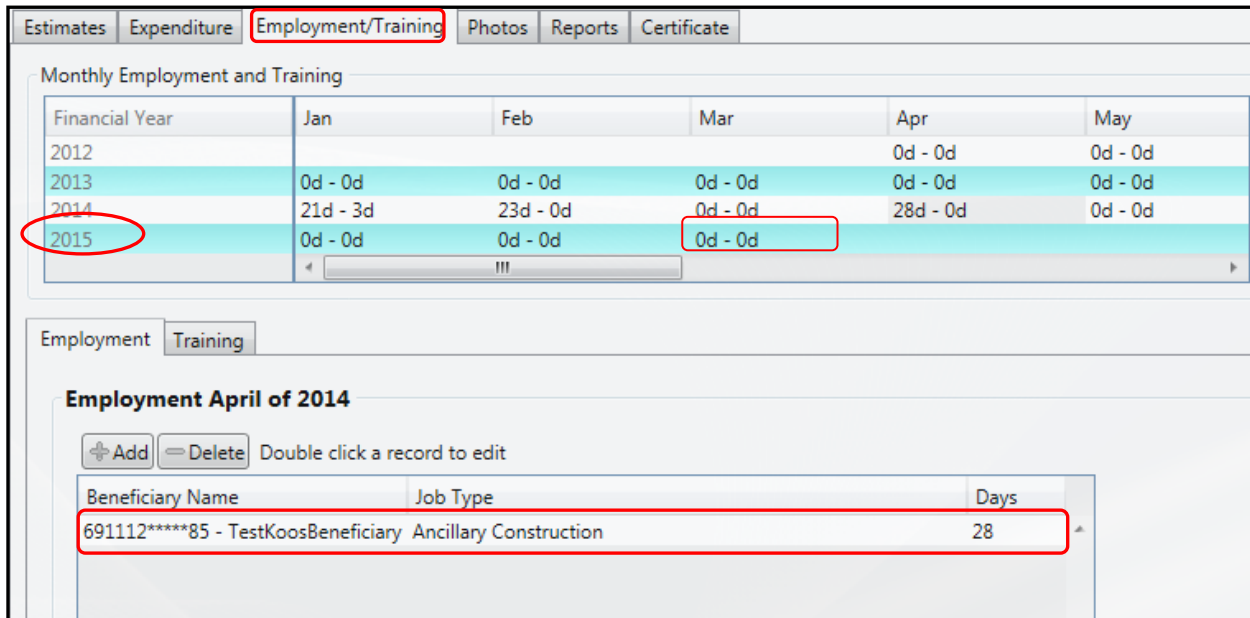
- The beneficiary has validation errors and errors must be fixed before the beneficiary can be used
- Edit beneficiary and synchronize lookups (See 8. Beneficiary)

The screenshot shows the 'Add Employment' screen with the 'Beneficiary' dropdown menu open. The list of beneficiaries is displayed in red text, indicating validation errors. The list includes names like ANDRIES RUITERS, Cobus Malan, Jaco Bezuidenhout, Meyer Jooste, JOHANNES MAHLANGU, Edward Ellonce Mathye, Laredo Tirnanic, STEPHANS TSHEGO, JOSEPH SKOSANA, Fritz Nieuwenhuisen, Pieter Jacobs, Marizelle Wilgenbus, Luvuyo Dadashe, Marizelle Nel, Natasha Pounadu, Erna Jacobs, and JOHAN DAVEL. The 'Job Type' dropdown is also open, showing 'Select'.

Figure 31: 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 32: Captured Employment data

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

#### 7.4.2. Edit Employment Data

- i. To edit employment data, click on the relevant project on the left, then click on the Employment/Training tab (See Figure 25)
- ii. Click on month for the correct year (See Figure 26)
- iii. Double click on the employment data record you wish to edit.
- iv. 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.

#### 7.4.3. Delete Employment Data

- i. To edit employment data, click on the relevant project on the left, then click on the Employment/Training tab (See Figure 25)
- ii. Click on month for the correct year (See Figure 26)
- iii. Click on the employment data record you wish to delete, and click on Delele
- iv. The system will confirm your action, click Yes to continue and No to cancel the changes.

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

#### 7.4.4. Bulk Add Employment Data

- i. To capture Employment in bulk, click on the relevant project on the left and click on the Employment/Training tab in the right (See Figure 25)

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

- Click on Synchronize Projects (Figure 14 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](mailto:itisissues@nra.co.za) with the relevant project number
- ii. Click on month for the correct year (See Figure 26)
  - iii. Click on Add Bulk/Upload Hours

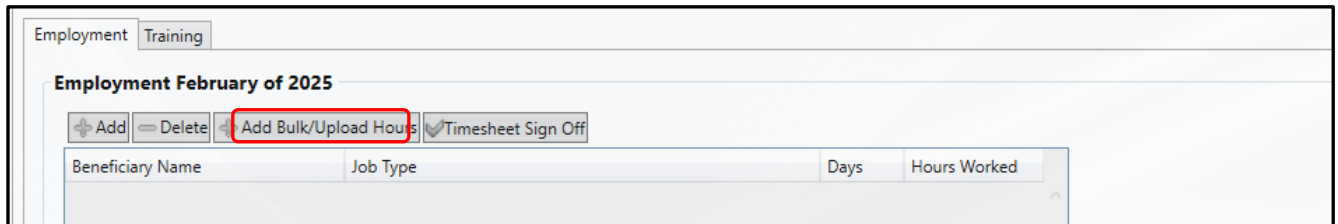


Figure 33: Bulk Upload / Hours Import Button

- iv. On the bulk capture/upload screen select the vendor from the dropdown (Figure 31 No 1)

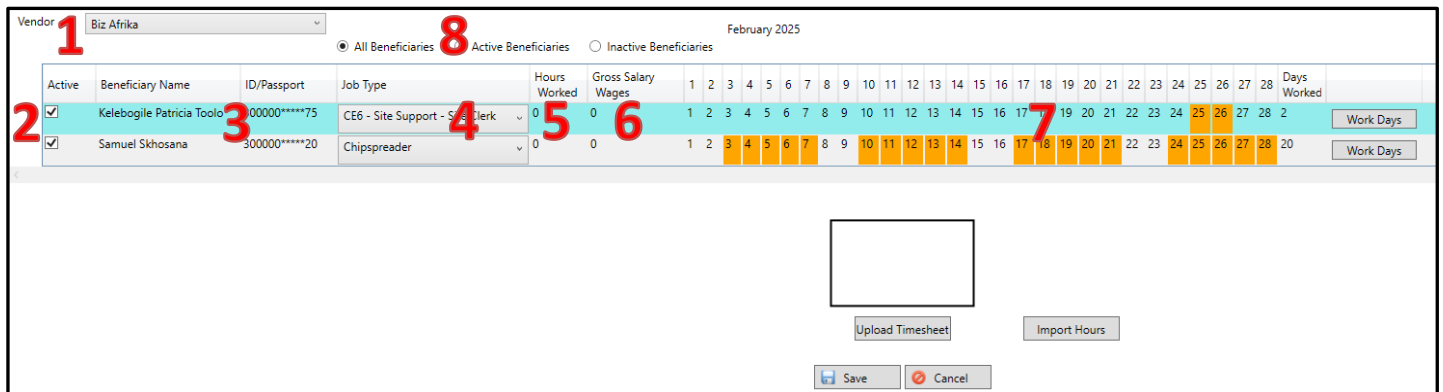


Figure 34: Bulk Capture Screen

1. **Vendor:** Select the vendor from the dropdown
2. **Active:** Mark a beneficiary active/inactive on a project by selecting or deselecting the checkbox. Marking a beneficiary as inactive will remove the beneficiary from all dropdowns in the software.

**NOTE:** Remember to synchronize lookups to update your software after changing any active flags

3. **Beneficiary List:** List of beneficiaries linked to the vendor on the selected project

**SELF HELP:** Don't see the beneficiaries linked to the vendor, then please check the following:

- Ensure that the active flag is set correctly
- Ensure that the beneficiary is correctly linked to the vendor on the project. See 8.4. Link existing Beneficiary to a Project for more information.
- Synchronize Lookups
- Restart your software. If all the above are correct then please send an email to [itisissues@nra.co.za](mailto:itisissues@nra.co.za) with the relevant project number

4. **Job Type:** Ensure correct job type is selected from the dropdown
  5. **Hours Worked:** Capture the total actual hours worked for the month
  6. **Gross Salary/Wage:** Capture the gross salary/wage paid for the hours worked.
  7. **Calendar:** Select the days that the beneficiary worked on the calendar, or make use of the button work days, selecting all working days or deselect all working days.
  8. **Beneficiary Active/Inactive toggle:** Update the Beneficiary list (3) based on the selected option
- v. Upload the timesheet
  - vi. Click on Save

#### 7.4.5. Import Employment Data

- i. To import Employment data, click on the relevant project on the left and click on the Employment/Training tab in the right (See Figure 25)

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

- Click on Synchronize Projects (Figure 14 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](mailto:itisissues@nra.co.za) with the relevant project number
- ii. Click on month for the correct year (See Figure 26)
  - iii. Click on Add Bulk/Upload Hours

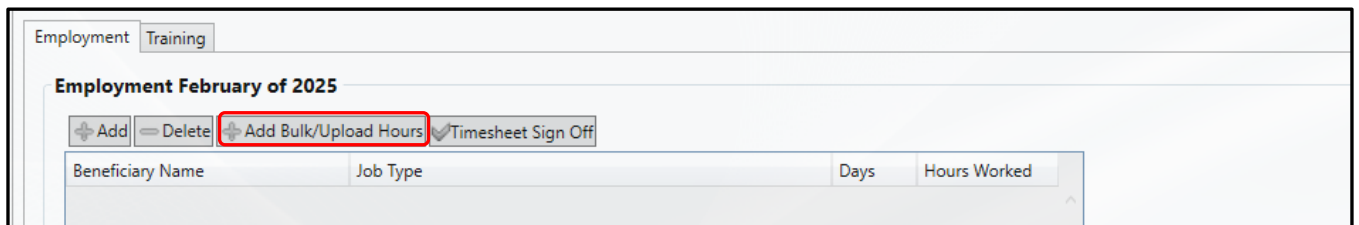


Figure 35: Bulk Upload / Hours Import Button

- v. On the bulk capture/upload screen select the vendor from the dropdown (Figure 31 No 1)
- vi. The Import wizard will now open with instructions on how to create your import file

Figure 36: Hours import screen

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

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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.

### 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 5<sup>th</sup> 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
ID Number	Number	13	Can be null	Optional if a passport no is present
Passport No	Character	30	Can be null	Optional if an ID no is present
Project No	Character	30	Required	
Work Month	Character	6	Required	MM-YYYY
Job Type	Number	5	Required	Job Types
Days of work	Number	10,2	Required	
Tender Value	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.

```
7701015150086;;R.061-024-2010/1;04-2013;2;22;15000.23 (CR) (LF)
7701015150086;;R.061-024-2010/1;05-2013;2;21;14500.63 (CR) (LF)
```

**Sample Record 1 Value Table**

Field Name	Data Value
Id Number	7701015150086
Passport No	null
Project No	R.061-024-2010/1
Work Month	April 2013
Job Type	2 = Roadworks; Labour Based
Days of work	22
Tender Value	R 15 000.23

**Sample Record 2 Value Table**

Field Name	Data Value
Id Number	7701015150086
Passport No	null
Project No	R.061-024-2010/1
Work Month	May 2013
Job Type	2 = Roadworks; Labour Based
Days of work	21
Tender Value	R 14 500.63

**7.4.6. Jop Type List**

Job Type Description	Job Type ID
AMR - Brand Manager	135
AMR - CRM Manager	142
AMR - Content Marketing Manager	138
AMR - Content Writer	129
AMR - Digital Marketing Manager	136
AMR - Email Marketing Specialist	133
AMR - Event Marketing Manager	140
AMR - Graphic Designer (Marketing)	132
AMR - Market Research Analyst	141
AMR - Marketing Assistant	127
AMR - Marketing Coordinator	126
AMR - Marketing Manager	134
AMR - PPC Specialist	131
AMR - Public Relations (PR) Manager	139
AMR - SEO Specialist	130
AMR - Social Media Coordinator	128
AMR - Social Media Manager	137
Ancillary Construction	11
BMS - Capture User	161
BMS - Structure Inspector	159
BMS - Technician	160
Building Maintenance	22
CE1 - General - General Worker	94
CE1 - General - Watchman	93
CE2 - Concrete - Reinforcing Steel Bending Machine Operator	92
CE2 - Concrete - Structures Construction Hand	212
CE2 - General - Civil Construction Bricklayer Gr 2	68
CE2 - Plant Operators, Drivers - Boomscraper Operator	213
CE2 - Plant Operators, Drivers - Crusher Assistant	214
CE2 - Plant Operators, Drivers - Hoist/Lift Operator	215
CE2 - Plant Operators, Drivers - Pedestrian Roller Operator	78
CE2 - Rail Construction - Perway Construction Hand	216

CE2 - Roads, Earthworks, Drainage - Premix Paving Checker/Tallyman	217
CE2 - Site Support - Artisan Aid	218
CE2 - Site Support - Materials Tester Assistant	219
CE2 - Site Support - Safety Watcher	220
CE2 - Site Support - Survey Assistant	221
CE3 - Concrete - Concrete Hand Gr 2	101
CE3 - Concrete - Shutterhand Gr 3	222
CE3 - Piling - Bore Pile Operator	223
CE3 - Piling - Frontman	224
CE3 - Piling - Nozzleman	225
CE3 - Plant Operators, Drivers - Track Rig Operator	227
CE3 - Plant Operators, Drivers - Winch Operator	226
CE3 - Roads, Earthworks, Drainage - Pipelayer Gr 2	228
CE3 - Roads, Earthworks, Drainage - Rakerman	229
CE3 - Site Support - Banksmann/Rigger Assistant	230
CE3 - Site Support - Junior Site Clerk	231
CE3 - Site Support - Welder Semi-Skilled	232
CE3 - Tailings - Mudguard Reclamation Attendant	233
CE4 - Concrete - Concrete Hand Gr 1	234
CE4 - Concrete - Reinforcing Hand Gr 2	235
CE4 - Concrete - Scaffold Erector	236
CE4 - Concrete - Shutterhand Gr 2	66
CE4 - Piling - Continuous Flight Auger Operator	237
CE4 - Plant Operators, Drivers - Articulated Dumper Truck Operator	238
CE4 - Plant Operators, Drivers - Bulldozer Operator	77
CE4 - Plant Operators, Drivers - Concrete Dumper Operator	239
CE4 - Plant Operators, Drivers - Concrete Mixer Operator	83
CE4 - Plant Operators, Drivers - Concrete Pump Operator	240
CE4 - Plant Operators, Drivers - Crusher Operator	241
CE4 - Plant Operators, Drivers - Driver Operator	242
CE4 - Plant Operators, Drivers - Excavator Operator	82
CE4 - Plant Operators, Drivers - Forklift Operator	243
CE4 - Plant Operators, Drivers - Front End Loader Operator	244
CE4 - Plant Operators, Drivers - Grader Operator (General)	75
CE4 - Plant Operators, Drivers - Hauler Driver (Bituminous)	245
CE4 - Plant Operators, Drivers - Heavy Duty Driver/Extra Heavy Duty Driver (Rigid)	246
CE4 - Plant Operators, Drivers - Light Motor Vehicle Driver	247
CE4 - Plant Operators, Drivers - Mechanical Broom Operator	89
CE4 - Plant Operators, Drivers - Milling Machine Operator	88
CE4 - Plant Operators, Drivers - Motorcycle Driver	248
CE4 - Plant Operators, Drivers - Paver Operator	80
CE4 - Plant Operators, Drivers - Road Recycler Operator	85
CE4 - Plant Operators, Drivers - Roller Operator	87
CE4 - Plant Operators, Drivers - TLB Operator	86
CE4 - Plant Operators, Drivers - Tower Crane Operator	81
CE4 - Plant Operators, Drivers - Tractor Driver	76

CE4 - Roads, Earthworks, Drainage - Blasting Assistant	249
CE4 - Roads, Earthworks, Drainage - Fence Erector	250
CE4 - Roads, Earthworks, Drainage - Guard Rail Erector	251
CE4 - Roads, Earthworks, Drainage - Sprayer Operator (Bituminous)	252
CE4 - Site Support - Formwork Controller	91
CE4 - Site Support - Formwork Controller	253
CE4 - Site Support - Materials Tester	104
CE4 - Site Support - Storeman	74
CE4 - Site Support - Tools and Small Plant Repairer	254
CE4 - Site Support - Wedge Welder	255
CE5 - Concrete - Reinforcing Hand Gr 1	256
CE5 - Concrete - Scaffold Inspector	257
CE5 - Concrete - Shutterhand Gr 1	258
CE5 - General - Civil Construction Bricklayer Gr 1	259
CE5 - Piling - Piling Auger Machine Operator	260
CE5 - Plant Operators, Drivers - Batch Plant Operator	261
CE5 - Plant Operators, Drivers - Heavy Duty Driver/Extra Heavy Duty Driver (Articulated)	262
CE5 - Plant Operators, Drivers - Mobile Crane Operator	263
CE5 - Plant Operators, Drivers - Scraper Operator	264
CE5 - Plant Operators, Drivers - Screed Operator	265
CE5 - Roads, Earthworks, Drainage - Kerblayer	277
CE5 - Roads, Earthworks, Drainage - Pipelayer Gr 1	67
CE5 - Site Support - Assistant Surveyor	266
CE5 - Site Support - Extrusion Welder	267
CE6 - Plant Operators, Drivers - Grader Operator (Final Levels)	72
CE6 - Plant Operators, Drivers - Sprayer Driver (Bituminous)	84
CE6 - Site Support - Senior Materials Tester (Field)	268
CE6 - Site Support - Senior Materials Tester (Lab)	103
CE6 - Site Support - Site Clerk	73
CE6 - Supervisors - Team Leader Gr 2	71
CE7 - Site Support - Plant Serviceman	269
CE7 - Supervisors - Supervisor Gr 2	270
CE8 - Supervisors - Supervisor Gr 1	271
CE9 - Artisan - Auto Electrician	274
CE9 - Artisan - Boilermaker	275
CE9 - Artisan - Diesel Mechanic	272
CE9 - Artisan - Filter and Turner	273
CE9 - Artisan - Spray Painter	276
Chipspreader	79
Contract Liasson Officer	110
Contracts Manager	40
Conveyancing	23
DEV - Intermediate Developer	108
DEV - Junoir Developer	107
DEV - Manager	109
DEV - Senior Developer	106

Designer	29
Drainage & Services: Labour Based	1
Drainage Forman	60
Drivers, Tipper Trucks (6m3/10m3) ADT	90
Environmental Officer	56
Fencing	8
Foremen - Earthworks	46
Foremen - Plant	49
Foremen - Structures	47
Foremen - Surfacing	48
General Foreman - Earthworks	44
General Foreman - Structures	45
HSE Coordinator	100
Health Officer	55
Horticulture	24
Junior Soils Technician	62
Junior Surveyor	59
LEG - Attorney	144
LEG - Compliance Officer	153
LEG - Contract Manager	154
LEG - Corporate Counsel	147
LEG - General Counsel	148
LEG - Lawyer	143
LEG - Legal Advisor	145
LEG - Legal Analyst	152
LEG - Legal Assistant	149
LEG - Legal Consultant	146
LEG - Legal Researcher	157
LEG - Legal Secretary	151
LEG - Litigation Attorney	155
LEG - Notary Public	158
LEG - Paralegal	150
LEG - Regulatory Affairs Specialist	156
Nursery Management	10
OS - Accounts Clerk	204
OS - Administrative Assistant	195
OS - Administrative Coordinator	210
OS - Cleaning Staff	211
OS - Contract Documentation and Tendering	6
OS - Customer Service Representative	201
OS - Data Capturer	98
OS - Document Controller	97
OS - Executive Assistant	5
OS - Executive Assistant	196
OS - Filing Clerk	206
OS - Front Desk Officer	200

OS - Human Resources Assistant	202
OS - Human Resources Manager	65
OS - Mailroom Clerk	208
OS - Office Administrator	193
OS - Office Clerk	198
OS - Office Coordinator	207
OS - Office Manager	194
OS - Office Manager	4
OS - Office Support Staff	209
OS - Payroll Clerk	203
OS - Personal Assistant	199
OS - Procurement Clerk	205
OS - Receptionist	64
OS - Secretary	197
OS - Site Management	7
OS - Site Staff	21
OS - Tea Lady	99
PMS - Agricultural Land Valuator	174
PMS - Cartographer	181
PMS - Commercial Property Valuator	172
PMS - Development Planner	178
PMS - Engineering Surveyor	167
PMS - Environmental Planner	179
PMS - GIS Specialist (Geographic Information Systems)	180
PMS - Geodetic Surveyor	168
PMS - Heritage Planner	190
PMS - Housing Development Planner	192
PMS - Hydrographic Surveyor	169
PMS - Infrastructure Planner	185
PMS - Junior Quantity Surveyor	51
PMS - Land Economist	184
PMS - Land Surveyor	27
PMS - Land Use Planner	177
PMS - Mine Surveyor	170
PMS - Planning Consultant	183
PMS - Property Development Manager	188
PMS - Property Valuator	28
PMS - Real Estate Appraiser	171
PMS - Regional Planner	176
PMS - Residential Property Valuator	173
PMS - Rural Development Planner	189
PMS - Senior Quantity Surveyor	50
PMS - Site Development Planner	187
PMS - Spatial Data Analyst	182
PMS - Town Planner	30
PMS - Transport Planner	191

PMS - Urban Planner	175
PMS - Zoning and Land Use Specialist	186
Plasterer	69
Project Liasson Officer	105
Property Negotiator	31
RRM Consultant Engineer	17
RRM Contractor	16
RRM Route Manager	18
RRM Route Patrol	19
RRM Site Staff	20
Roadworks - Flag Person	102
Roadworks: Labour Based	2
SANRAL Buildings	25
SEC - Alarm Monitoring Operator	124
SEC - Security Guard	26
SEC - Security Manager	122
SEC - Security Officer	120
SEC - Security Supervisor	121
SEC - Security Trainer	125
SEC - Surveillance Operator	123
Safety Officer	54
Senior Soils Technician	61
Senior Surveyor	58
Site Administration Officer	52
Site Agent - Earthworks	41
Site Agent - Structures	42
Site Engineer - Earthworks	95
Site Engineer - Structures	96
Steel Fixer	70
Structures	3
TMS - Traffic Data Analyst	166
TMS - Traffic Engineer	162
TMS - Traffic Modeling Specialist	165
TMS - Traffic Planner	164
TMS - Traffic Technician	163
TOLL - Toll Account Specialist	119
TOLL - Toll Booth Attendant	111
TOLL - Toll Cashier	13
TOLL - Toll Customer Service Representative	118
TOLL - Toll Enforcement Officer	117
TOLL - Toll Equipment Maintenance Technician	113
TOLL - Toll Fraud Prevention Specialist	116
TOLL - Toll Infrastructure Engineer	114
TOLL - Toll Operations Manager	12
TOLL - Toll Plaza Maintenance Worker	115
TOLL - Toll Plaza Manager	112

TOLL - Toll Supervisor	14
TOLL - Toll System Technician	15
Technician - Structures	43
Traffic Officer	53
Trainees	63
Weed Eradication	9
Workshop Manager	57

#### 7.4.7. Employment Signoff and Timesheet upload

- i. To signoff Employment data, click on the relevant project on the left and click on the Employment/Training tab in the right (See Figure 25)

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

- Click on Synchronize Projects (Figure 14 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](mailto:itisissues@nra.co.za) with the relevant project number

- ii. Click on month for the correct year (See Figure 26)
- iii. Click on Timesheet Sign Off

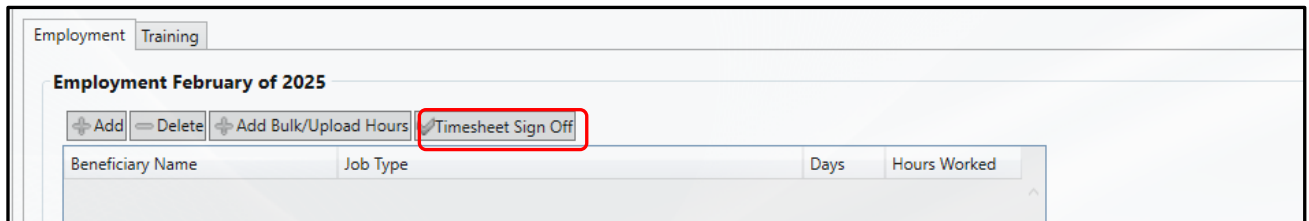


Figure 37: Timesheet Sign off

- vii. Select the vendor from the dropdown

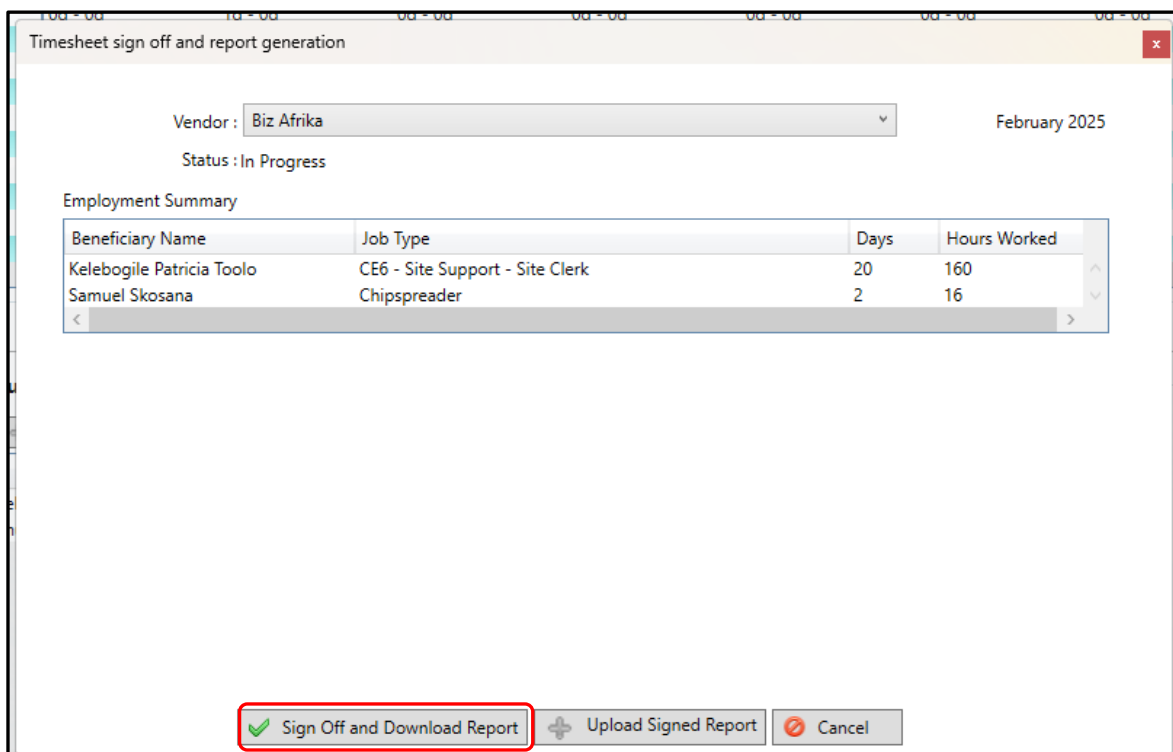


Figure 38: Timesheet Sign off Screen

- viii. Click on Sign Off and Download Report
- ix. This will download a pdf report from the server. This report must be checked for correctness and be signed by the line manager and payroll manager from the selected vendor.

Project Timesheet																											
Project No : N 001-035-2012/1 DEMO - RRM N1 SEC 3-5 test demo																											
Vendor Name : Biz Afrika																											
From : 1 February, 2025														To : 28 February, 2025													
D2496D2D6CDD2947BB4D00F284211F40																											
Beneficiary Name	Job Type	Hours	Work Days	03	04	05	06	07	10	11	12	13	14	17	18	19	20	21	24	25	26	27	28				
Skosana, Samuel	Chipsreader	16	2							✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
Toolo, Kelebogile Patricia	CE6 - Site Support - Site Clerk	160	20	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				
Vendor Line Manager _____														Vendor Payrol Manager _____													

Figure 39: Project Timesheet Report

**SELF HELP:** Is there a problem with the data on the report, then please correct the data before proceeding:

- Refer to section 7.4.2 Edit Employment Data on how to update incorrect beneficiary information
- Once corrected you will have to restart the Employment signoff and timesheet upload process

Timesheet sign off and report generation

Vendor: Biz Afrika February 2025

Status: Report Downloaded

Employment Summary

Beneficiary Name	Job Type	Days	Hours Worked
Kelebogile Patricia Toolo	CE6 - Site Support - Site Clerk	20	160
Samuel Skosana	Chipsreader	2	16

Figure 40: Upload signed report

- x. Once signed click on upload signed report
- xi. Select the signed pdf and click on Open
- xii. Click on Save.

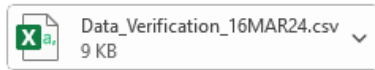
**NOTE:** This process will replace the upload of timesheets on the timesheet tab

### 7.4.8. Employment Data Verification

As part of the audit requirements all hours information must be verified by SANRAL. The following data will be verified by SANRAL:

- **Timesheet:** The hours captured for a beneficiary will be verified against the uploaded timesheet.
- **Proof of payment:** A proof of payment must be uploaded for the month in which any hours are captured against a beneficiary.

If any of the details are not correct the data will be declined with a reason for the decline. A daily email will be sent with all the information of the declined records.



Good day,

Please find attached data to be corrected.  
Attached data has been declined by the Data Verification process.  
Open attachment for more information.

[itisweb@nra.co.za](mailto:itisweb@nra.co.za)

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Figure 41: Data Verification Email

The above email will be sent to the user that captured the employment data, uploaded the timesheet and proof of payment.

Please see 7.4.2 Edit Employment Data, 7.6.2 Edit Timesheet and 7.7.2 Edit Timesheet on how to edit and correct the invalid data of the hours captured.

## 7.5. Project Training Data

### 7.5.1. Add Training Data

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

Figure 42: Add training screen

- iii. Select the Beneficiary

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

- Synchronize your lookups (Figure 14 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 43: Beneficiary with validation errors

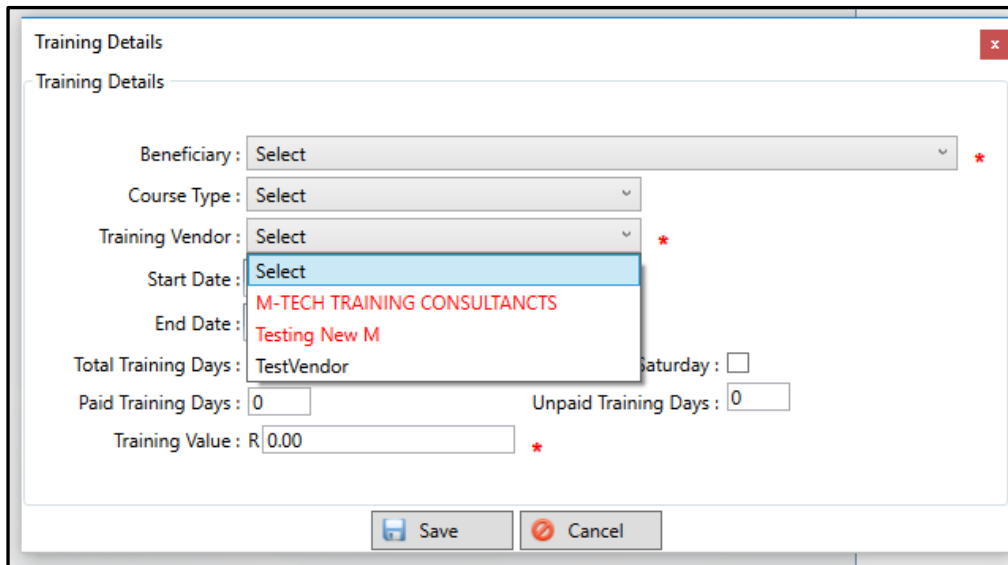
- iv. Select the Course Type
- v. Select the Training Vendor

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

- Synchronize your lookups (Figure 14 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)



The screenshot shows a 'Training Details' form with the following fields and values:

- Beneficiary: Select (with a red asterisk)
- Course Type: Select
- Training Vendor: Select (with a red asterisk)
- Start Date: Select
- End Date: M-TECH TRAINING CONSULTANCTS (in red text)
- Total Training Days: TestVendor
- Paid Training Days: 0
- Unpaid Training Days: 0
- Training Value: R 0.00 (with a red asterisk)

Buttons for 'Save' and 'Cancel' are visible at the bottom.

Figure 44: 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

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

## 7.6. Timesheets

As part of the audit requirements timesheets for all hours captured must be uploaded onto ITIS.

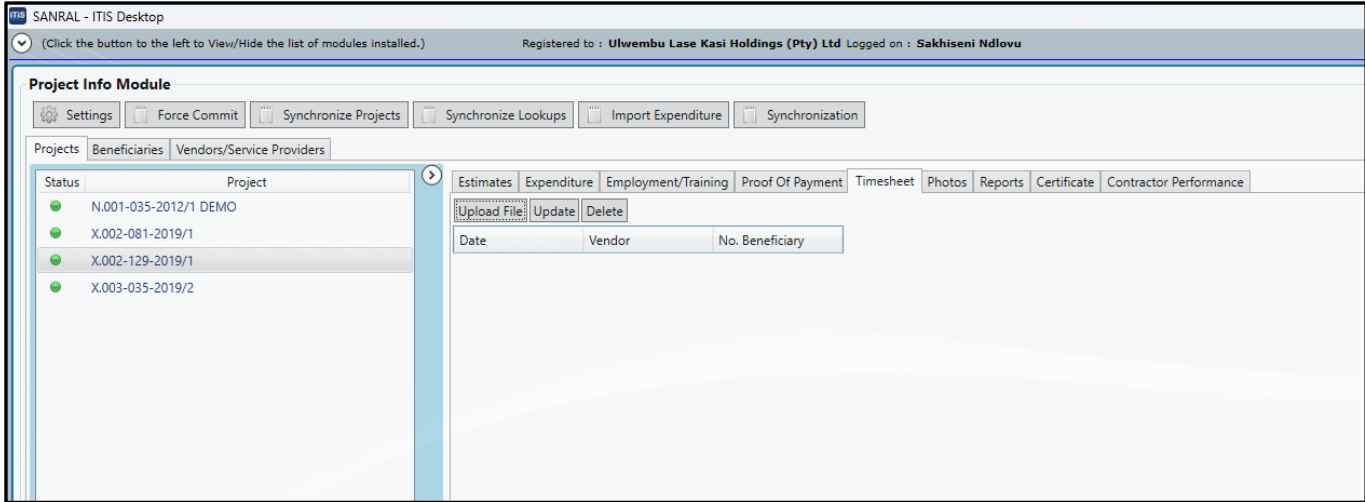


Figure 45: Timesheet tab

### 7.6.1. Upload Timesheet


**NOTE:** Please refer to 7.4.7. Employment Signoff and Timesheet upload for the updated process on how to sign off timesheets and uploaded signed reports

### 7.6.2. Timesheet Verification

As part of the audit requirements all hour's information must be verified by SANRAL. The following data will be verified by SANRAL:

- **Timesheet:** The hours captured for a beneficiary will be verified against the uploaded timesheet.
- **Proof of payment:** A proof of payment must be uploaded for the month in which any hours are captured against a beneficiary.

If any of the details are not correct the data will be declined with a reason for the decline. A daily email will be sent with all the information of the declined records.

	<b>Integrated Transport Information System</b>	Document #:	Rev.: 9
	Title: ITIS Desktop Project Information Module – User Manual		Page #: 43 of 87



Good day,

Please find attached data to be corrected.  
 Attached data has been declined by the Data Verification process.  
 Open attachment for more information.

[itisweb@nra.co.za](mailto:itisweb@nra.co.za)

\*\*\*\*  
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Figure 46: Data Verification Email

The above email will be sent to the user that captured the employment data, uploaded the timesheet and proof of payment.

## 7.7. Proof of Payment

As part of the audit requirements proof of payments for all hours captured must be uploaded onto ITIS.

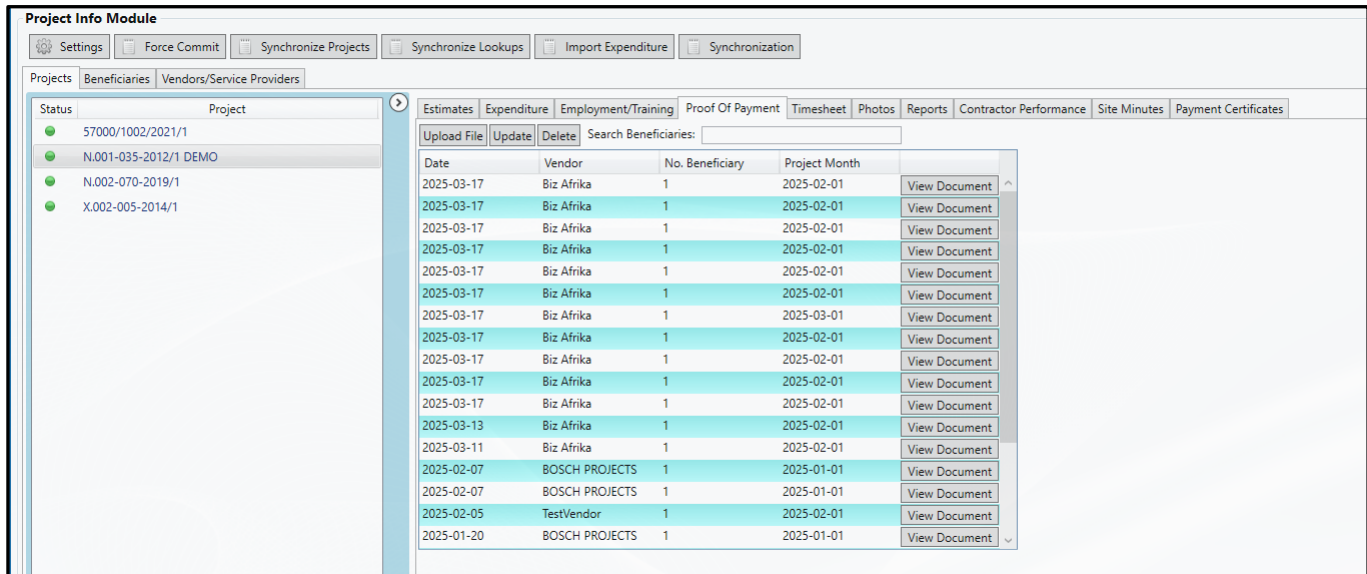


Figure 47: Proof of Payment Tab

### 7.7.1. Upload Proof of Payment

- i. Click on Upload File

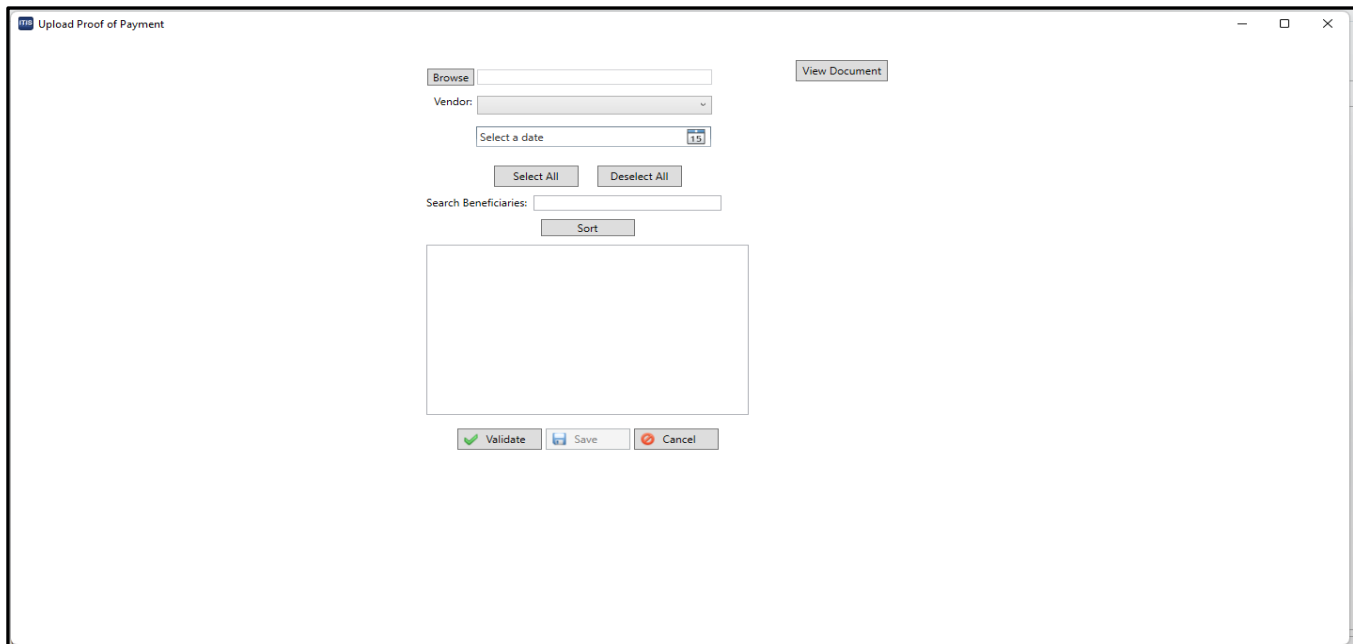


Figure 48: Proof of Payment Upload

- ii. Click on Browse and select the file you want to upload
- iii. Select the Vendor from the vendor dropdown
- iv. Select all beneficiaries that are included on the uploaded proof of payment document
- v. Click on Validate to validate the data against the document uploaded
- vi. If no errors found you can click on Save

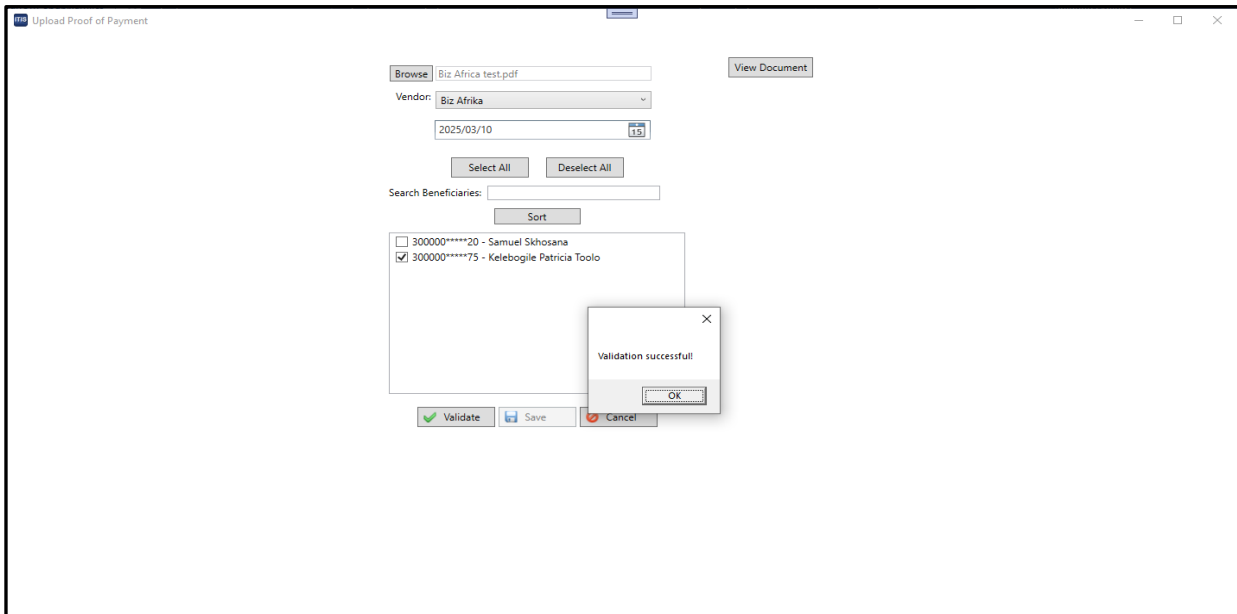


Figure 49: Proof of payment without errors

vii. If any errors or discrepancies are found the system will inform you of these errors.

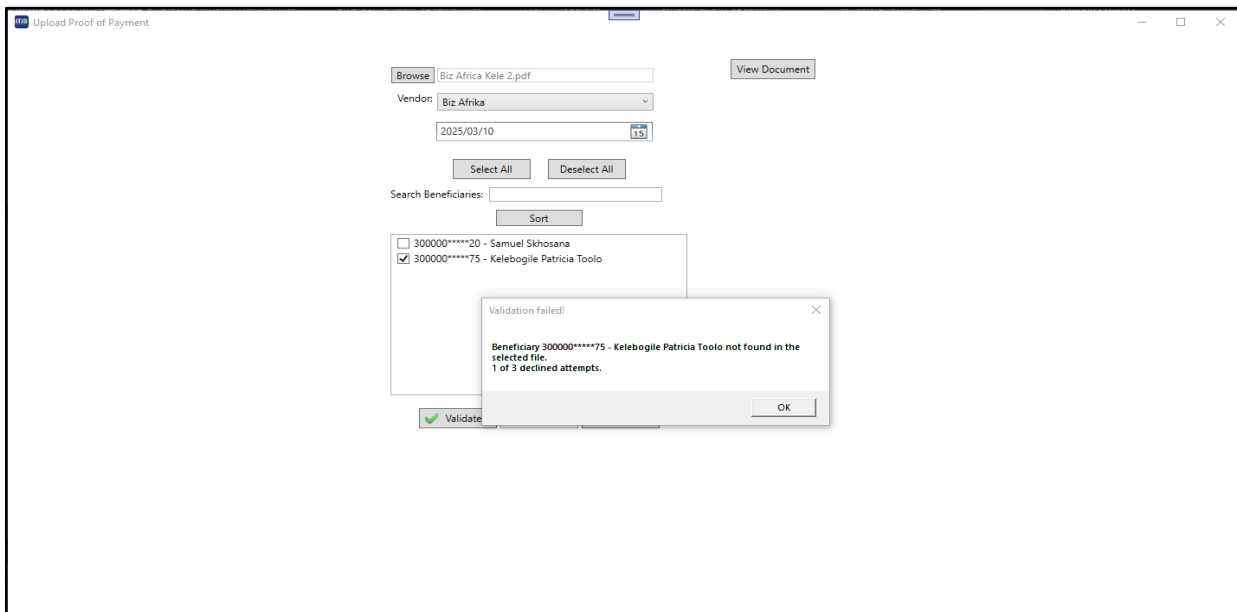


Figure 50: Proof of Payment with errors

viii. Please check that your document uploaded is correct and that the data has been captured correctly. You must validate the data three times, if after the third attempt there are still errors, you can request manual verification by clicking on save.

### 7.7.2. Edit Proof of Payment

- i. To edit a proof of payment entry double click on the entry
- ii. On the pop-up screen make the required changes
- iii. Click on Validate to validate the changes
- iv. Click on Save to save the data or Cancel to exit the screen

### 7.7.3. Delete Proof of Payment

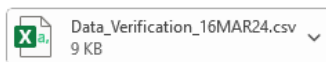
- i. To delete a proof of payment entry, select the entry
- ii. Click on Delete
- iii. Confirm the action by clicking on OK

### 7.7.4. Proof of Payment Verification

As part of the audit requirements all hour's information must be verified by SANRAL. The following data will be verified by SANRAL:

- **Timesheet:** The hours captured for a beneficiary will be verified against the uploaded timesheet.
- **Proof of payment:** A proof of payment must be uploaded for the month in which any hours are captured against a beneficiary.

If any of the details are not correct the data will be declined with a reason for the decline. A daily email will be sent with all the information of the declined records.



Good day,

Please find attached data to be corrected.  
Attached data has been declined by the Data Verification process.  
Open attachment for more information.

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Figure 51: Data Verification Email

The above email will be sent to the user that captured the employment data, uploaded the timesheet and proof of payment.

Please see 7.4.2 Edit Employment Data, 7.6.2 Edit Timesheet and 7.7.2 Edit Timesheet on how to edit and correct the invalid data of the hours captured.

## 7.8. Photos

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

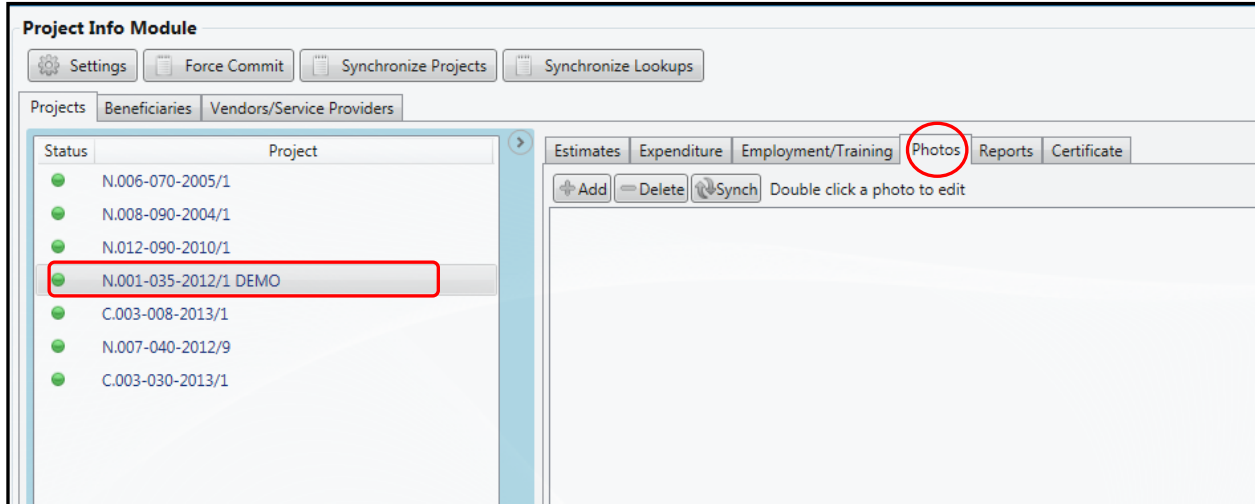


Figure 52: Project Photos

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

- Click on Synchronize Projects (Figure 14 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:

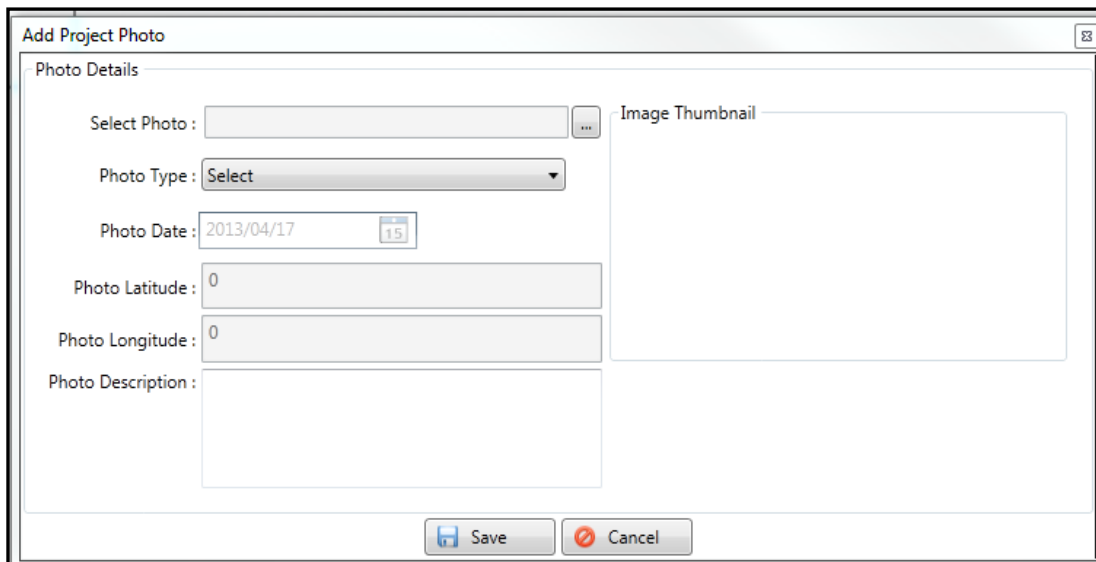



Figure 53: Add photo screen

- 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:

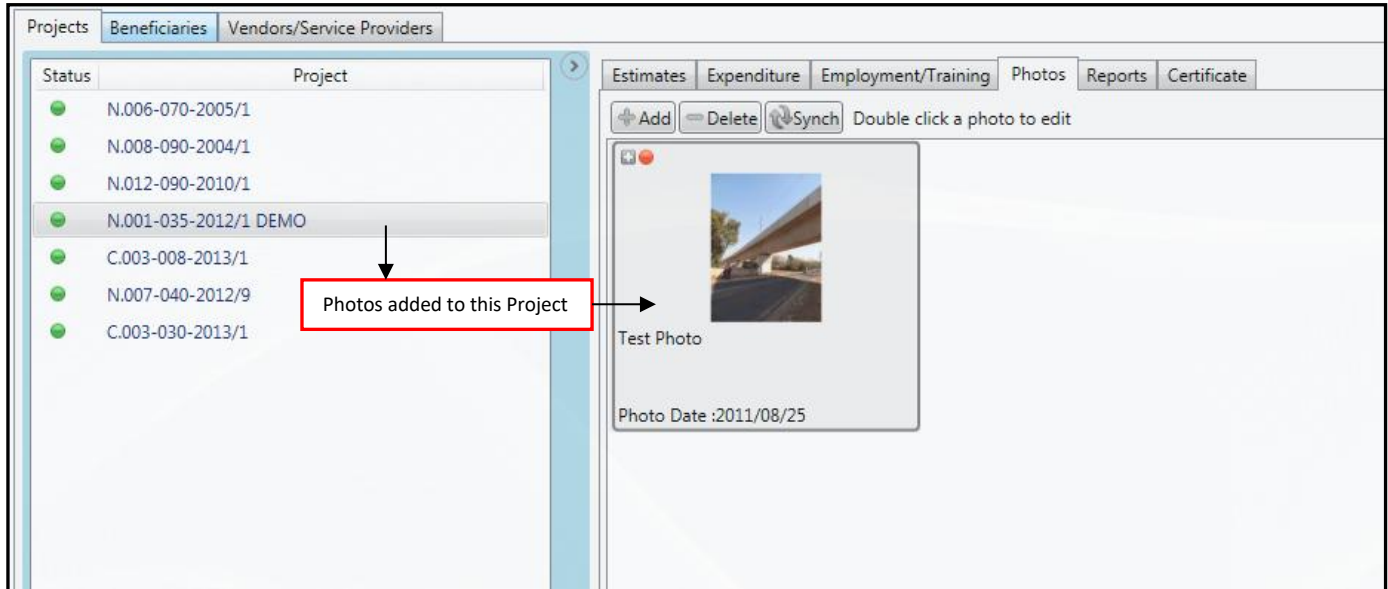


Figure 54: Photo not yet synched to server

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

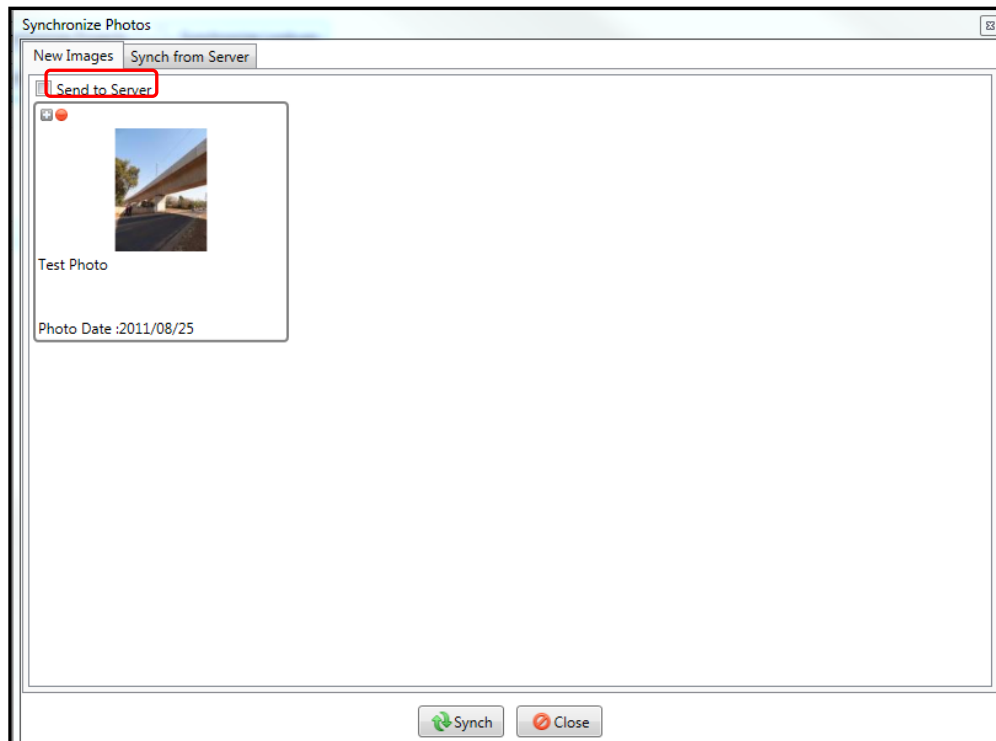


Figure 55: Photo synchronization

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:

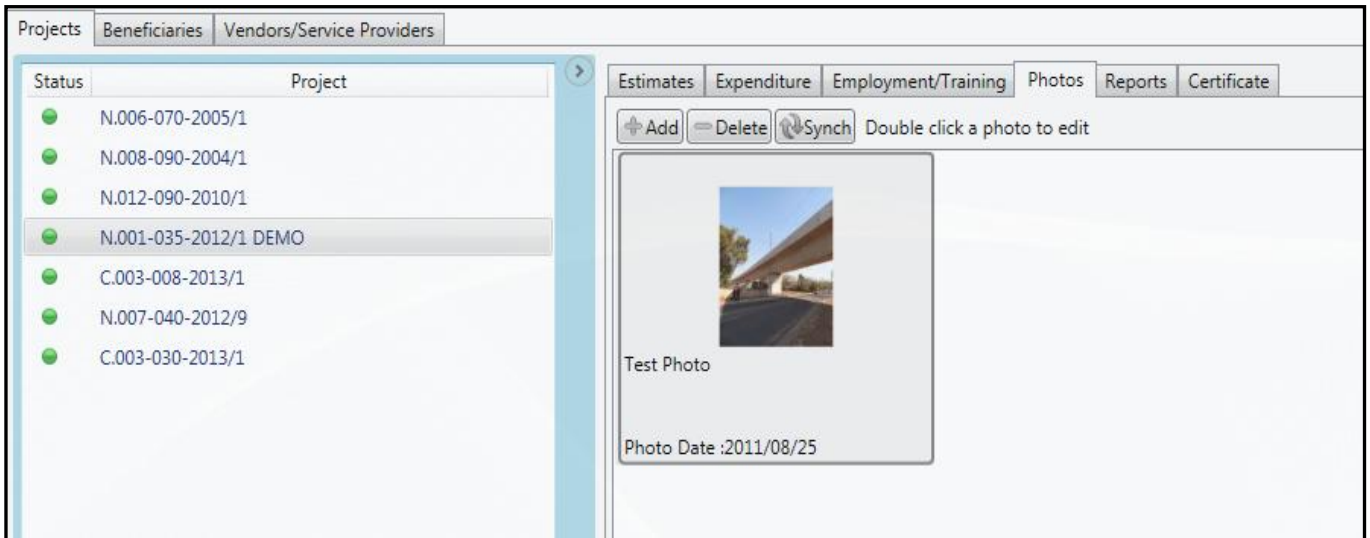


Figure 56: Synchronised photo

## 7.9. Reports

To download Project Reports, click on Reports Tab:

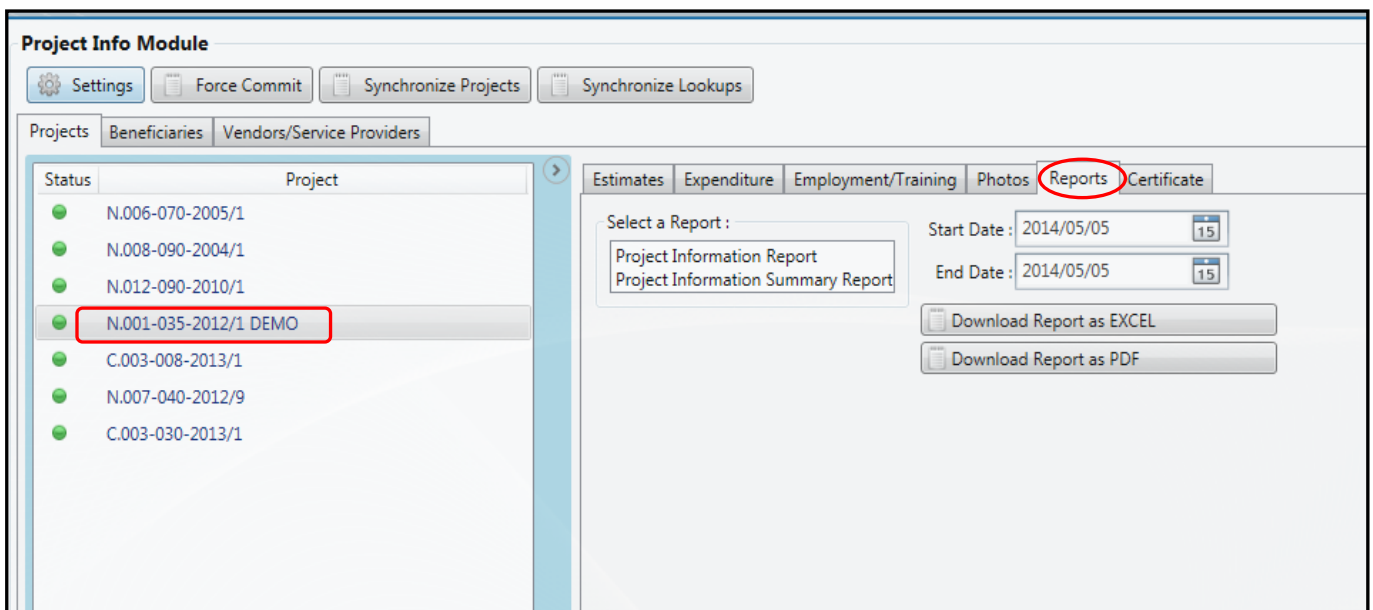



Figure 57: Project Reports

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

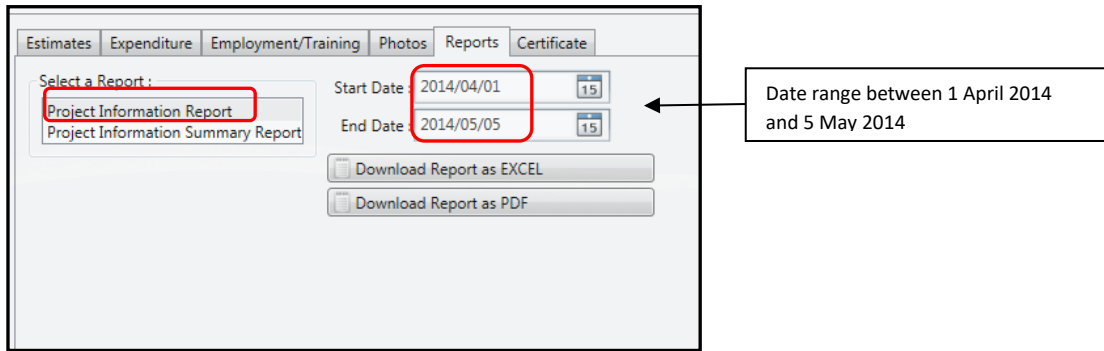


Figure 58: Report parameters

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

## 7.10. Site Minutes

As part of the audit requirements site minutes must be uploaded onto ITIS. These site minutes will only be accessible by the person that uploaded the document

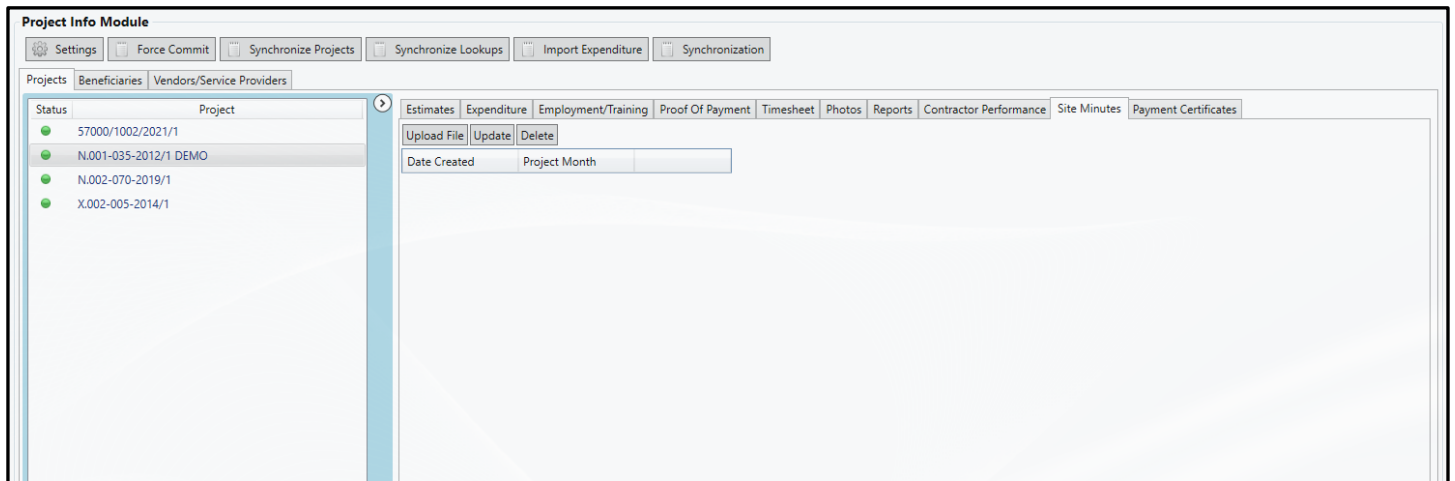


Figure 59: Site Minutes Tab

### 7.10.1. Upload Site minutes

- i. Click on Upload File

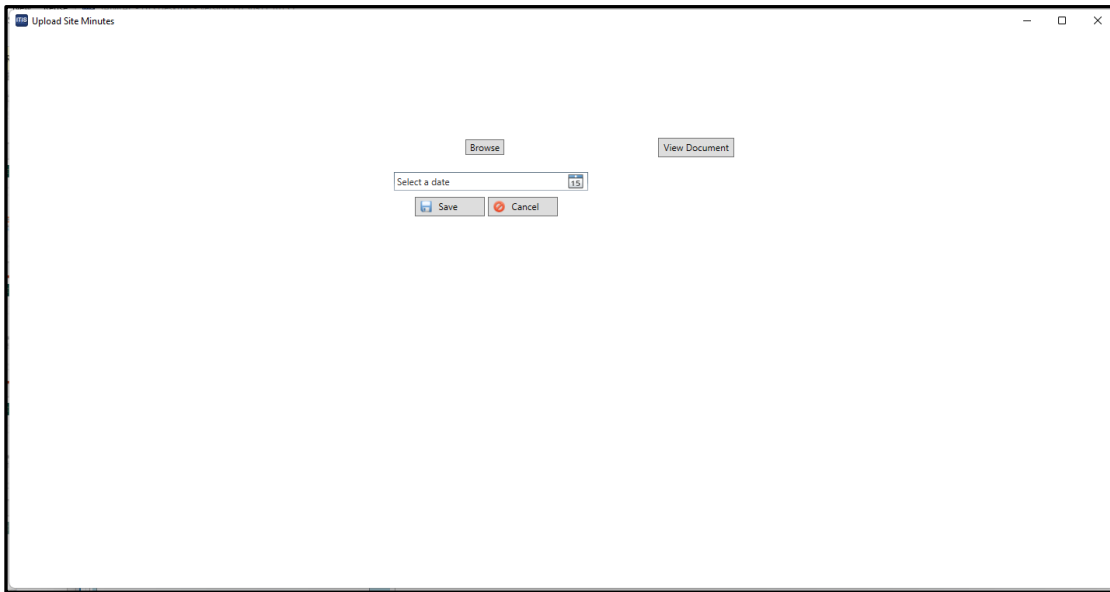


Figure 60: Site Minutes Upload screen

- ii. Click on Browse and select the file you want to upload
- iii. Select the date of the site minutes
- iv. Click on Save

### 7.10.2. Delete Site minutes

- i. Click on the site minutes you want to delete
- ii. Click on Delete
- iii. Confirm action by clicking on Ok to continue or Cancel to cancel

### 7.11. Payment Certificate

As part of the audit requirements payment certificates must be uploaded onto ITIS. These payment certificates will only be accessible by the person that uploaded the document.

**NOTE:** This is only required for non RRM projects. RRM certificates are already created in ITIS

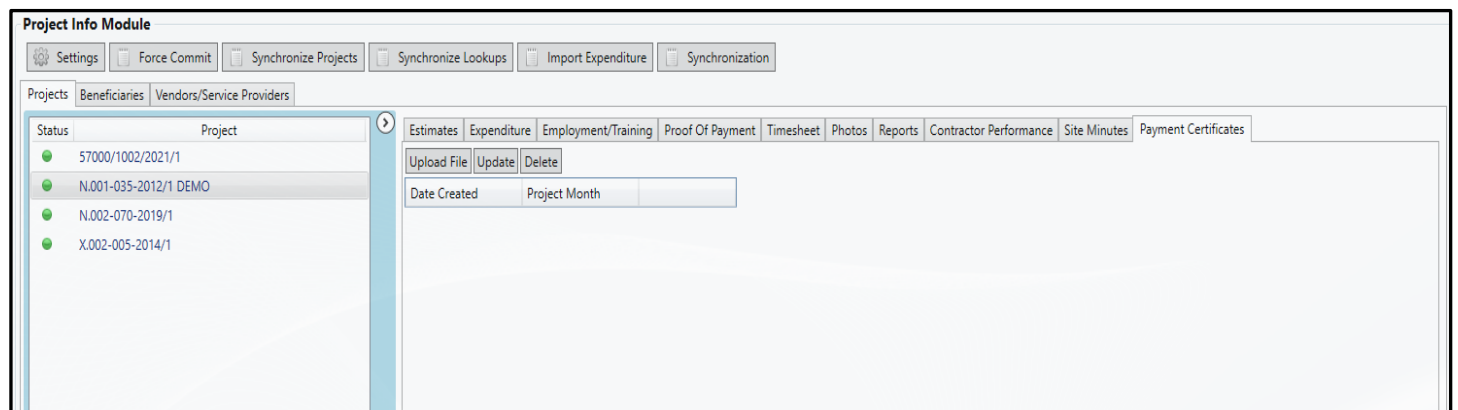


Figure 61: Payment Certificate Tab

### 7.11.1. Upload Payment Certificate

- v. Click on Upload File

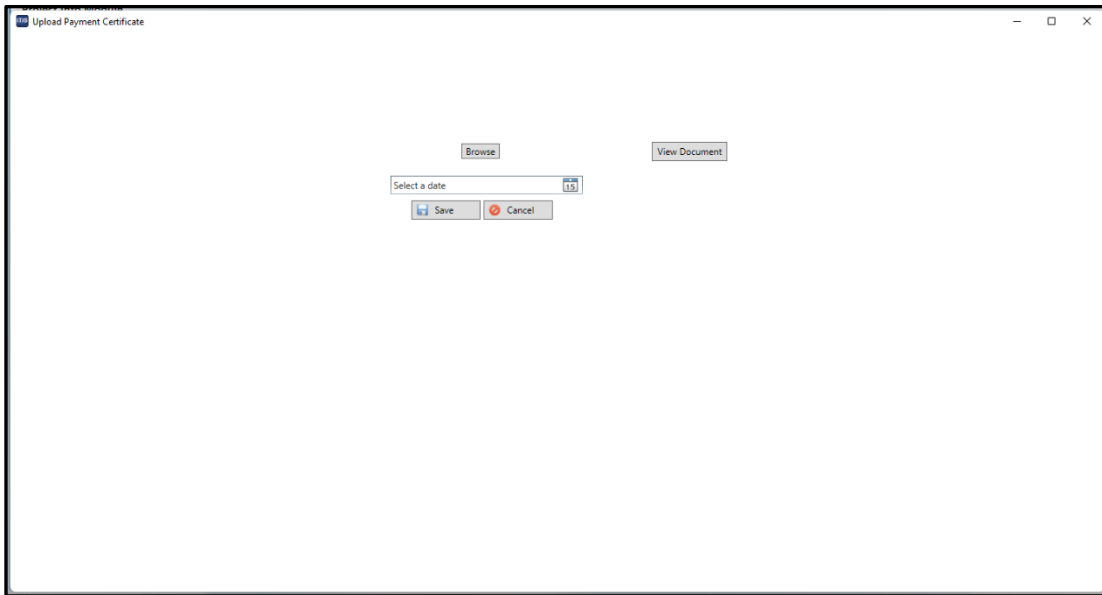


Figure 62: Upload payment certificate screen

- vi. Click on Browse and select the file you want to upload
- vii. Select the date of the site minutes
- viii. Click on Save

### 7.11.2. Delete Payment Certificate

- iv. Click on the payment certificate you want to delete
- v. Click on Delete
- vi. Confirm action by clicking on Ok to continue or Cancel to cancel

## 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.

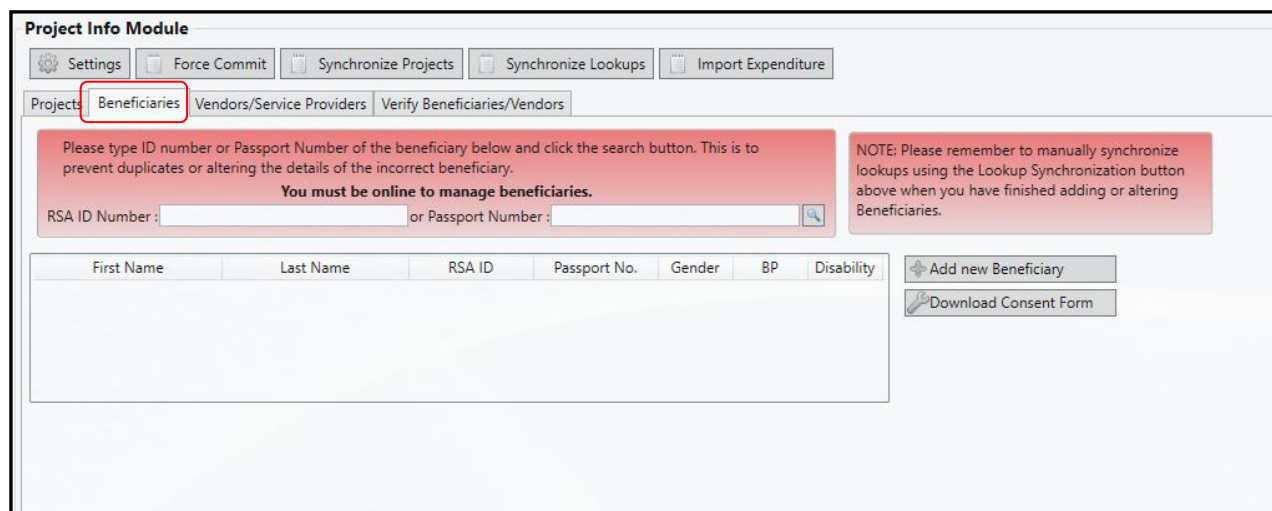


Figure 63: Beneficiary tab

### 8.1. Add a Beneficiary using RSA ID or Smart ID card

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:

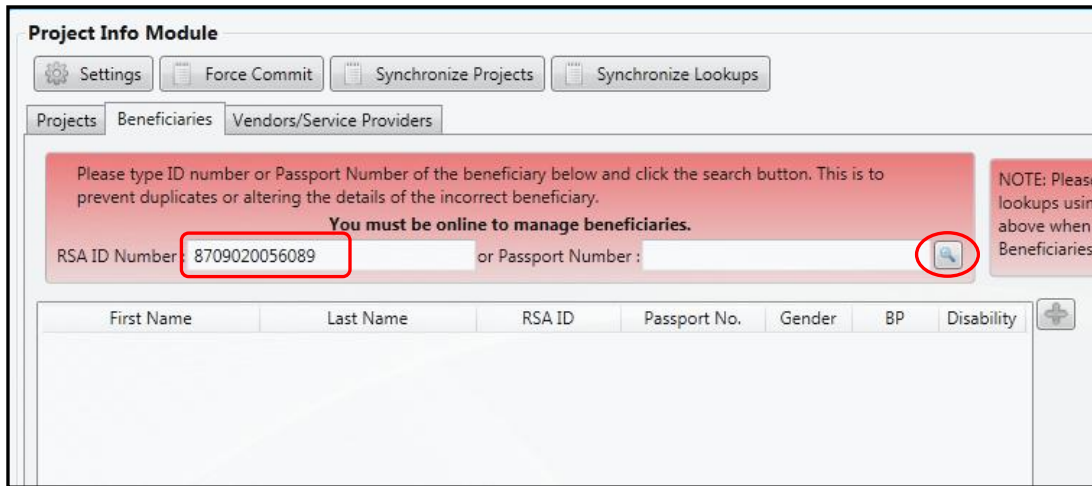



Figure 64: Search for beneficiary

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

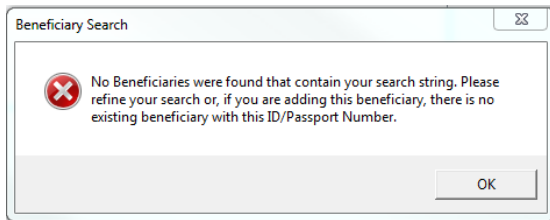


Figure 65: No beneficiary found screen

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

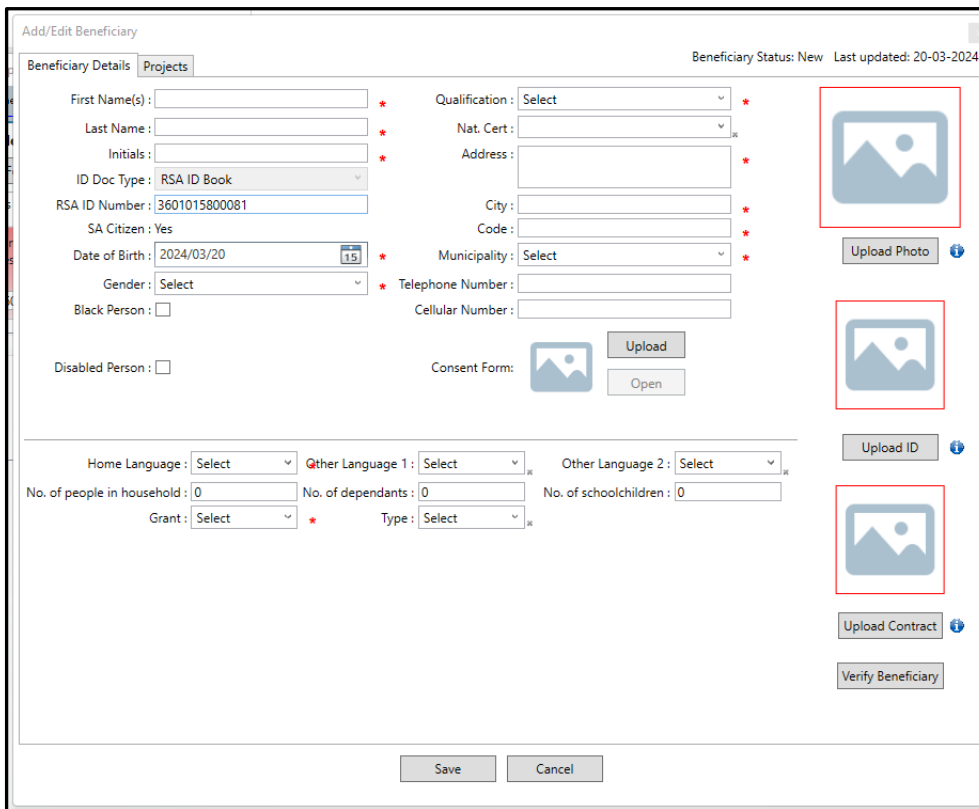


Figure 66: Add/Edit beneficiary screen

- **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.

- **Upload Contract:** A copy the beneficiaries employment contract must be uploaded.

#### 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

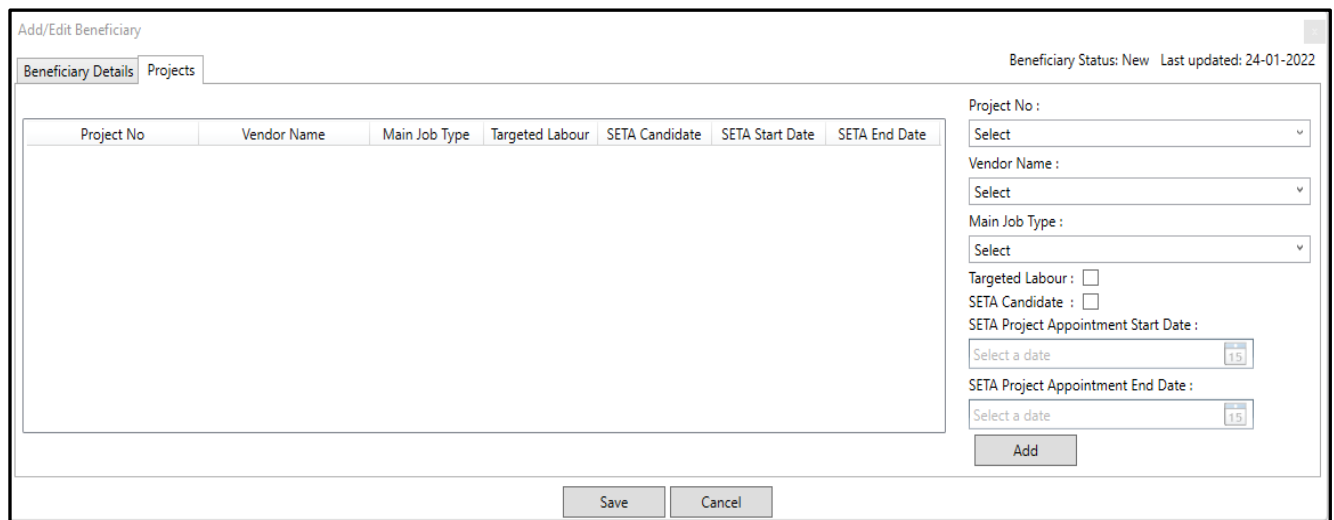


Figure 67: Link beneficiary to project

- 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 14 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:

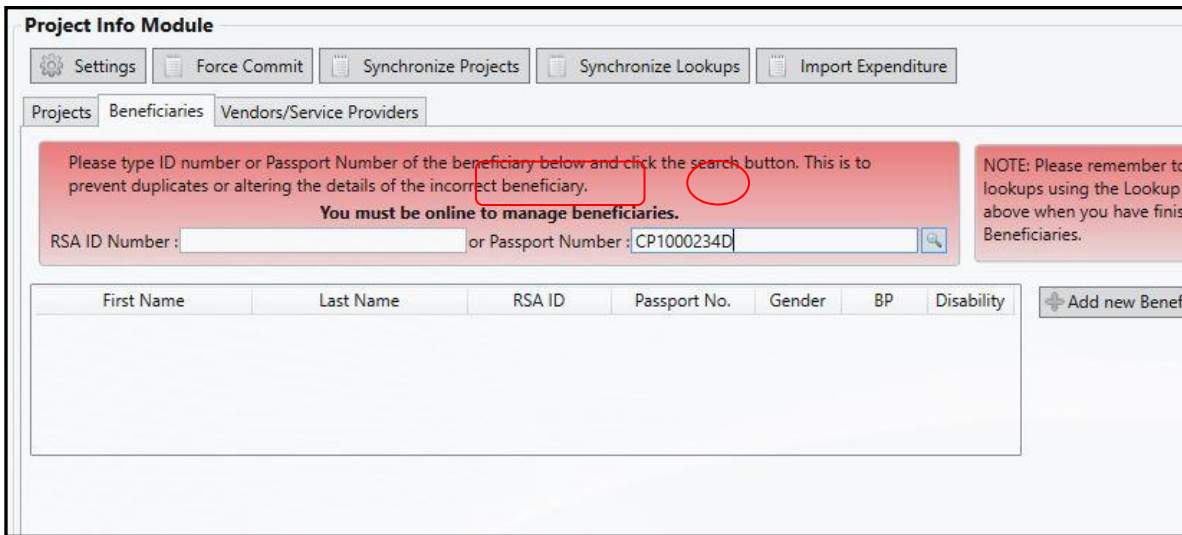



Figure 68: Search for beneficiary

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

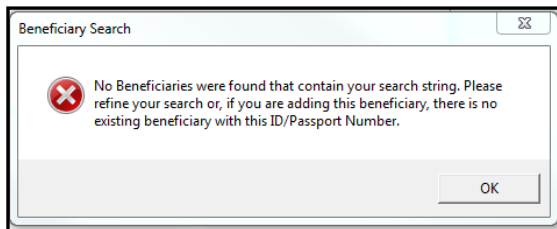


Figure 69: No beneficiary found screen

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

Figure 70: 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.
- **Upload Contract:** A copy the beneficiaries employment contract must be uploaded.

#### 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

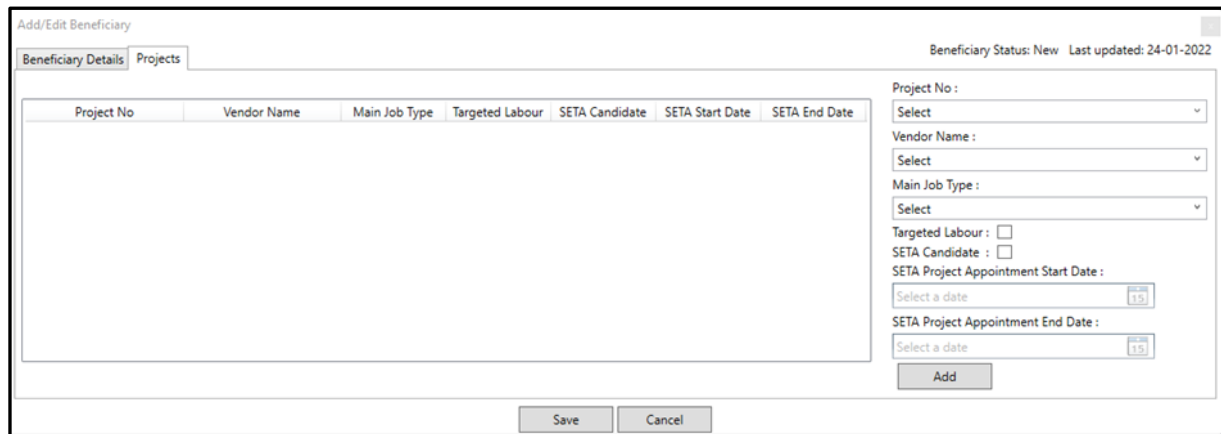



Figure 71: Link beneficiary to project screen

- 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 14 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 

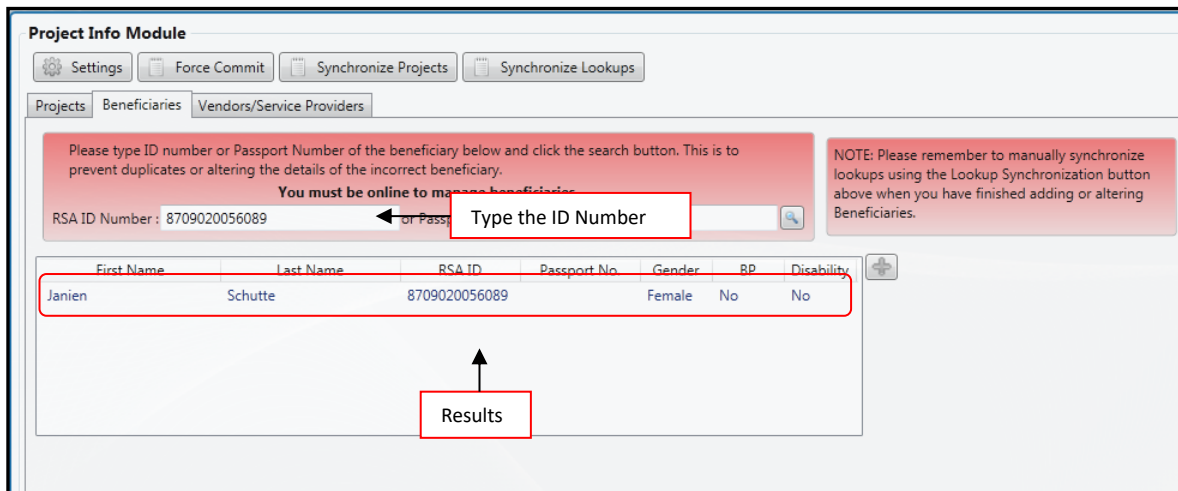



Figure 72: Search for a beneficiary

- 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 

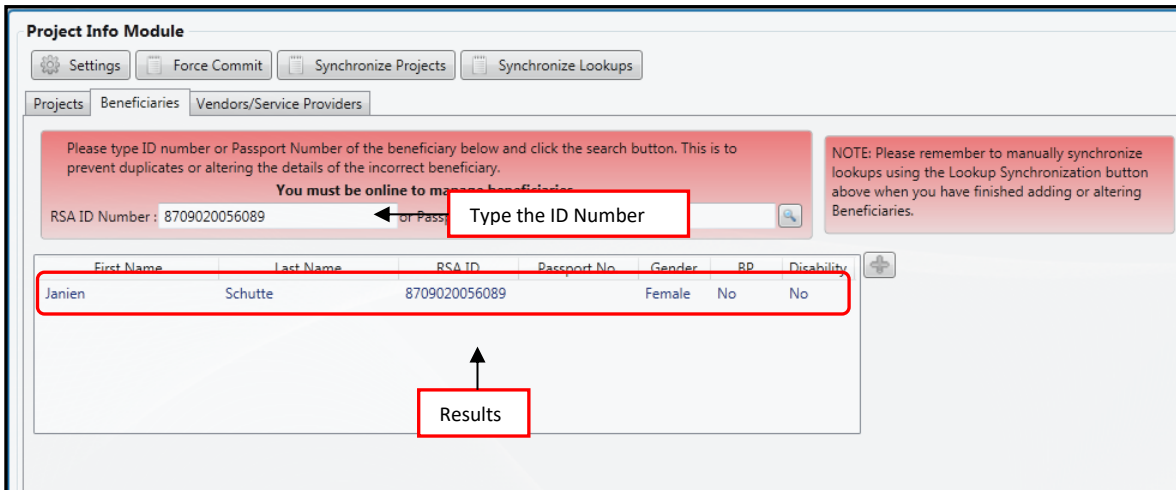


Figure 73: Search for a beneficiary

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

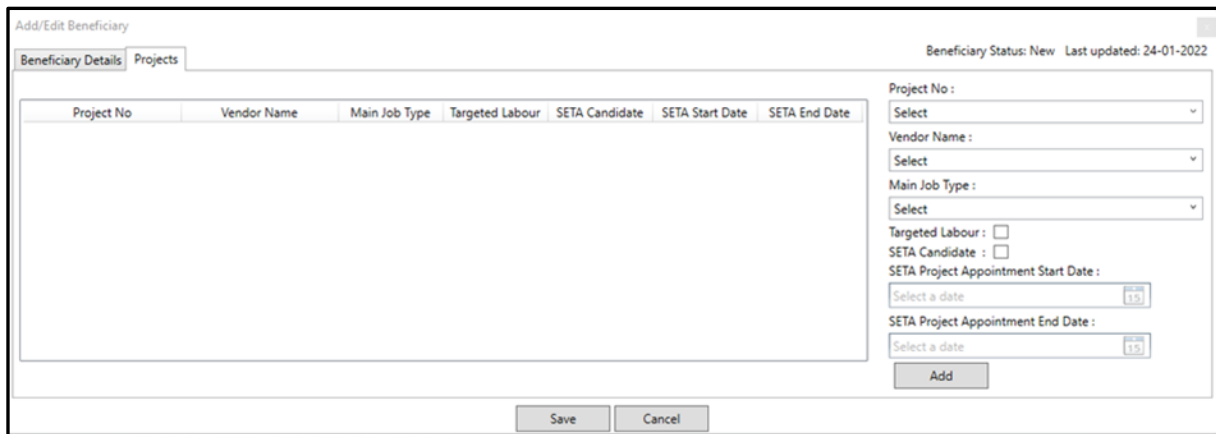


Figure 74: Link beneficiary to project screen

- 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 14 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

## 8.5. Upload Beneficiary Consent Form

As per the Protection of Personal Information Act (POPIA) it is required that each beneficiary signs the consent form and that the signed consent form is uploaded to the beneficiary. The consent form that must be signed can be downloaded in the software.

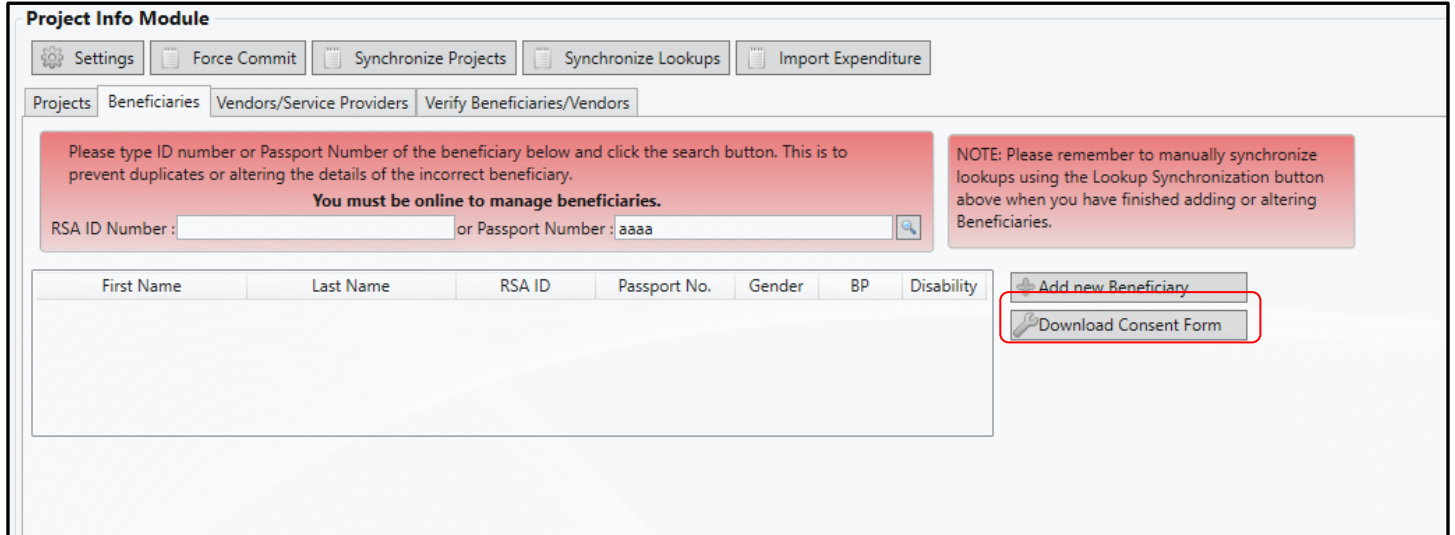



Figure 75: Download Consent Form

- i. On the Beneficiary tab click on Download Consent Form 
- ii. The beneficiary must be completed and sign the consent form
- iii. After completion the consent form must be uploaded to the system.
- iv. To upload the consent form, follow the steps on how to edit a beneficiary

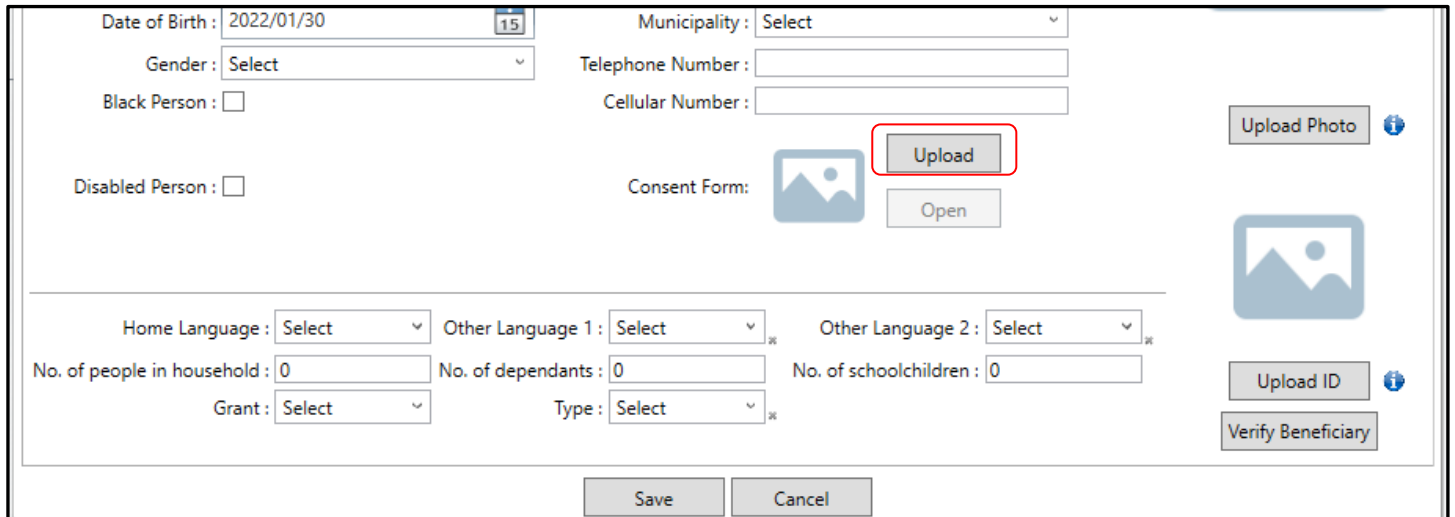


Figure 76: Upload the Consent Form

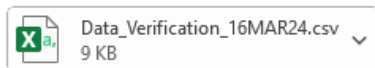
- v. On the Edit Beneficiary screen click on Upload
- vi. Select the file and click on Open
- vii. Click on Save

## 8.6. Beneficiary Data Verification

As part of the audit requirements all beneficiary information must be verified by SANRAL. The following data will be verified by SANRAL:

- **ID Document:** Full Name and Surname, Date of Birth, Gender and ID number will be verified against the ID document.
- **Passport and Visa:** Full Name and Surname, Date of Birth, Gender, Passport and Visa information will be verified against the Passport and Visa.
- **Consent Form:** Consent forms will be verified to ensure the document is the SANRAL consent form, the details are for the beneficiary and the consent form is signed.

If any of the details are not correct the data will be declined with a reason for the decline. A daily email will be sent with all the information of the declined records.



Good day,

Please find attached data to be corrected.  
Attached data has been declined by the Data Verification process.  
Open attachment for more information.

[itisweb@nra.co.za](mailto:itisweb@nra.co.za)

\*\*\*\*  
D: | M:  
[itisweb@nra.co.za](mailto:itisweb@nra.co.za) | [www.sanral.co.za](http://www.sanral.co.za)  
Fraud Hotline Number - 0800 204 558



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Figure 77: Data Verification Email

The above email will be sent to the user that created the beneficiary as well as all users that capture any hours against the beneficiary.

Please see 8.3 Edit a beneficiary on how to edit and correct the invalid data of the beneficiary.

## 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.

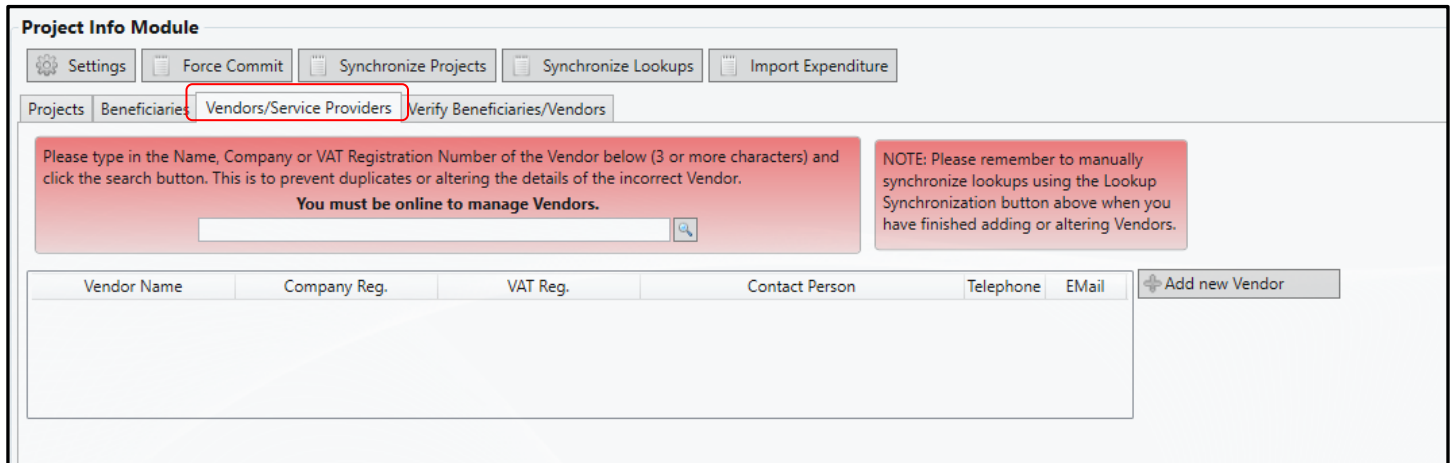


Figure 78: Vendor / Service Provider tab

### 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

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

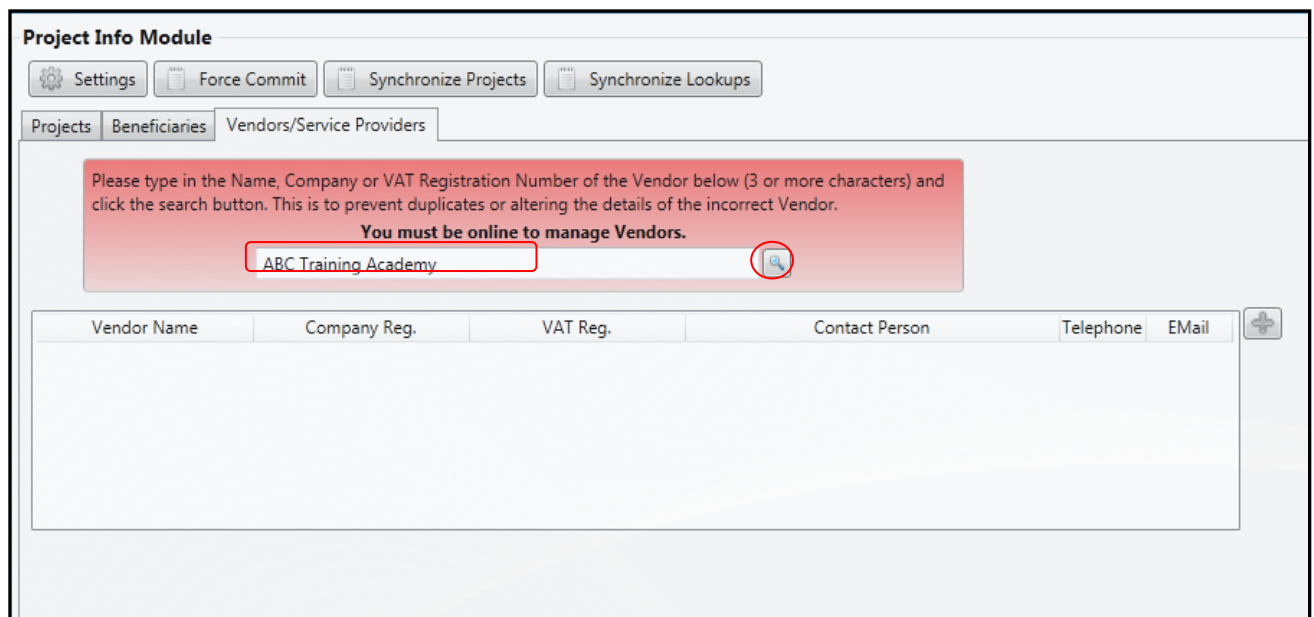


Figure 79: Search for a vendor

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

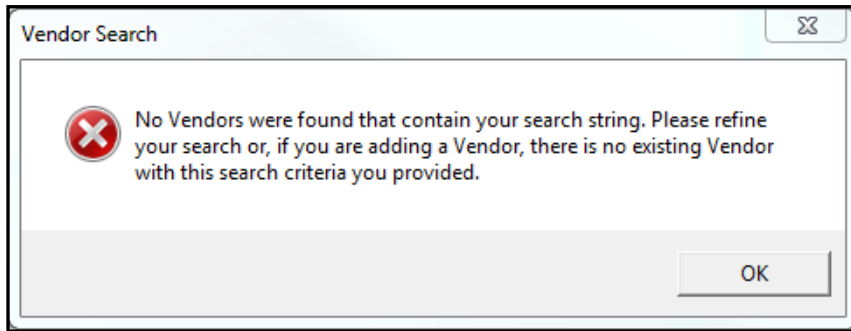


Figure 80: No vendor found screen

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

Figure 81: 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 not 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

- **CIDB Grading and Level:** This is the vendor’s CIDB grading and level as per CIDB certificate, if applicable
- **CIDB Cert No:** The CIDB certificate not as per the certificate
- **CIDB Expiry:** The CIDB certificate expiry date as per the certificate

**NOTE:** The capturing of CIDB information has moved to new tab – CIDB – See 9.1.2 CIDB 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.

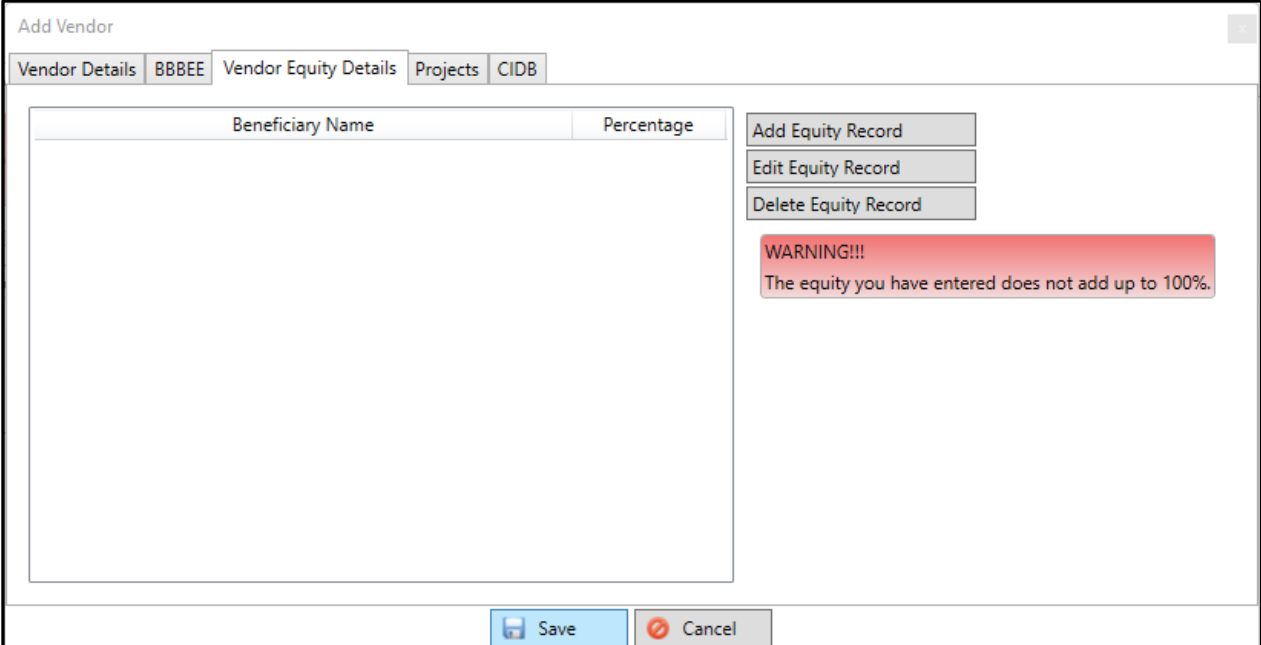


Figure 82: Link vendor to a project

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.

Add/Edit Vendor Equity

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 vendor equity.**

RSA ID Number :  or Passport Number :

First Name	Last Name	RSA ID	Passport No.	Gender	BP	Disability
Karl-Heinz	Niebuhr	840512*****82		Male	No	No

Beneficiary Name : Karl-Heinz Niebuhr

Percentage :

Figure 83: 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)

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 :

Figure 84: 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

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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 vendor.

### 9.1.2. CIDB Certificate

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 | **BBBEE** | 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 85: 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 Validate CIDB Certificate to validate the data against the document uploaded
- iv. If no errors found, you can click on Save

**Add/Edit Vendor**

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

CIDB Grading:  CIDB Level:

CIDB Cert No:

CIDB Expiry:

CIDB Grading	CIDB Level	CIDB Cert No	Status	Verified By	Verified Date	Decline Reason
CE	Level 2	456123285	New		N/A	

Validation successful!

Figure 86: CIDB Certificate without errors

- v. If any errors or discrepancies are found the system will inform you of these errors.

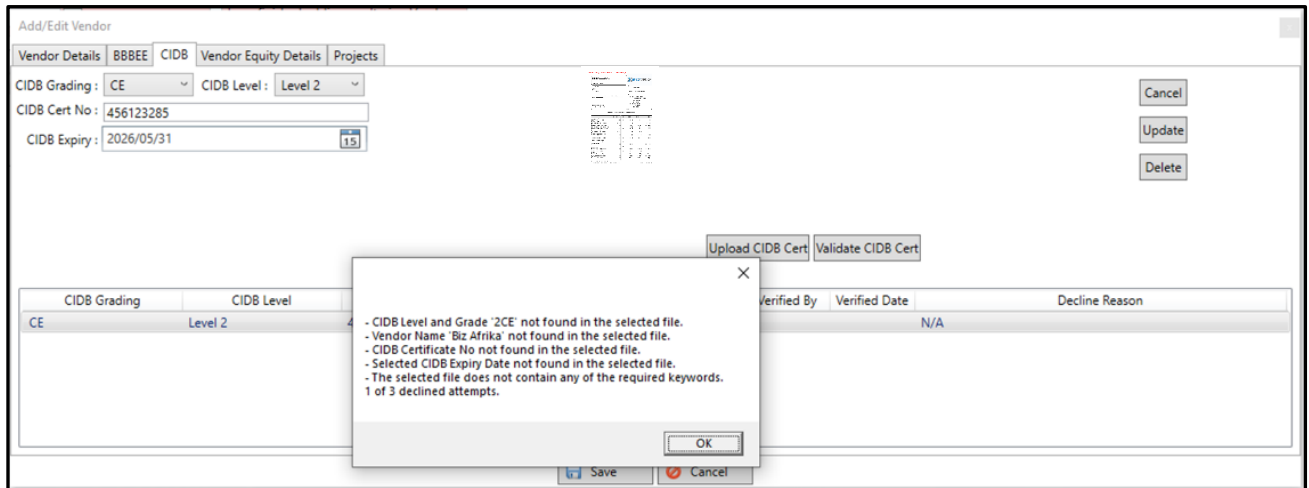


Figure 87: CIDB Certificate with errors

- vi. Please check that your document uploaded is correct and that the data has been captured correctly. You must validate the data three times, if after the third attempt there are still errors, you can request manual verification by clicking on save.
- vii. Click on Add

**EDIT CIDB CERTIFICATE**

Add Vendor

Vendor Details | **BBBEE** | 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
CE	Level 2	CW459/89/2012	10/02/2022	New		

Figure 88: 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. If info was updated, click on Validate CIDB Certificate to validate changes made
- v. 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.

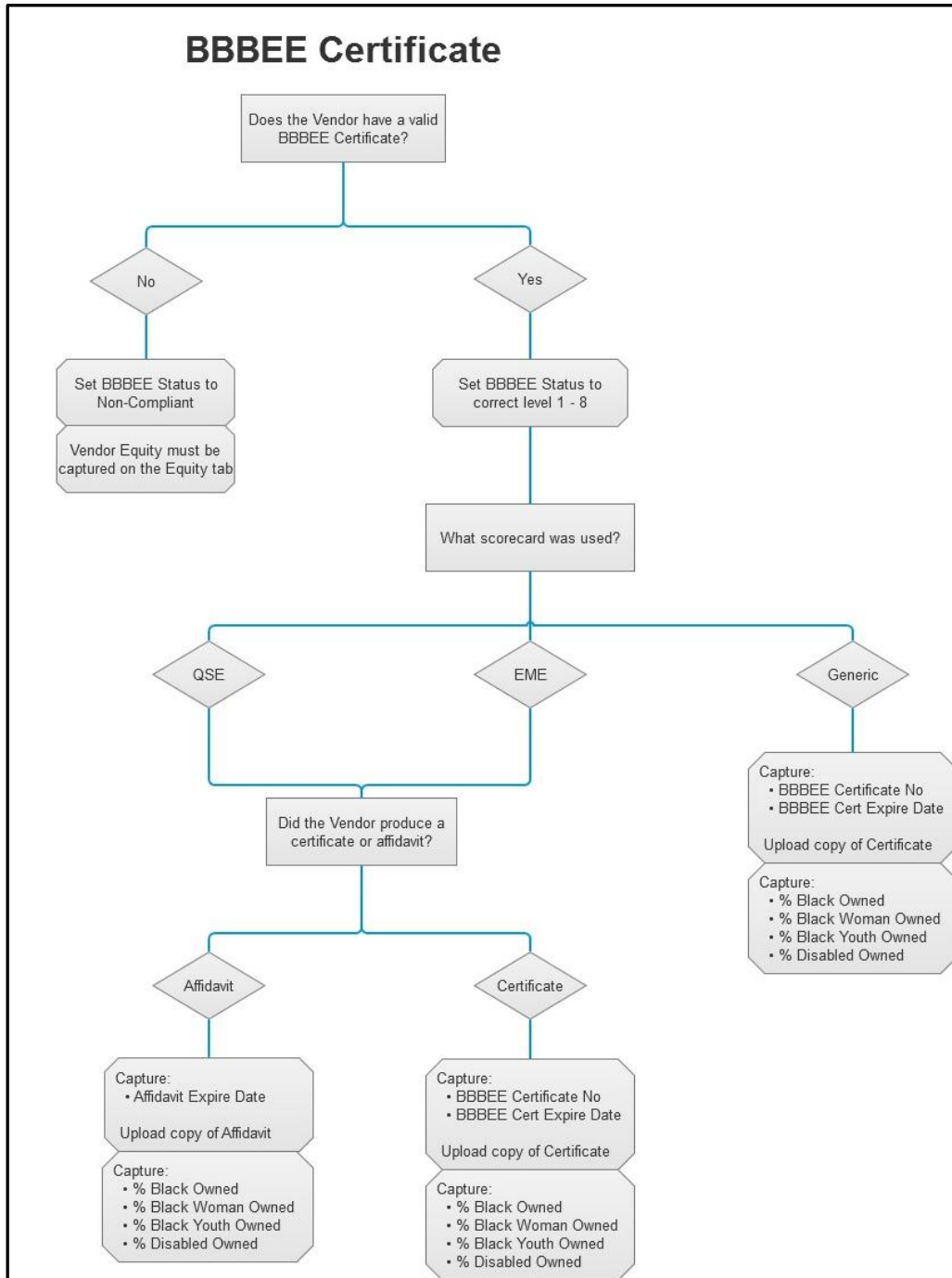
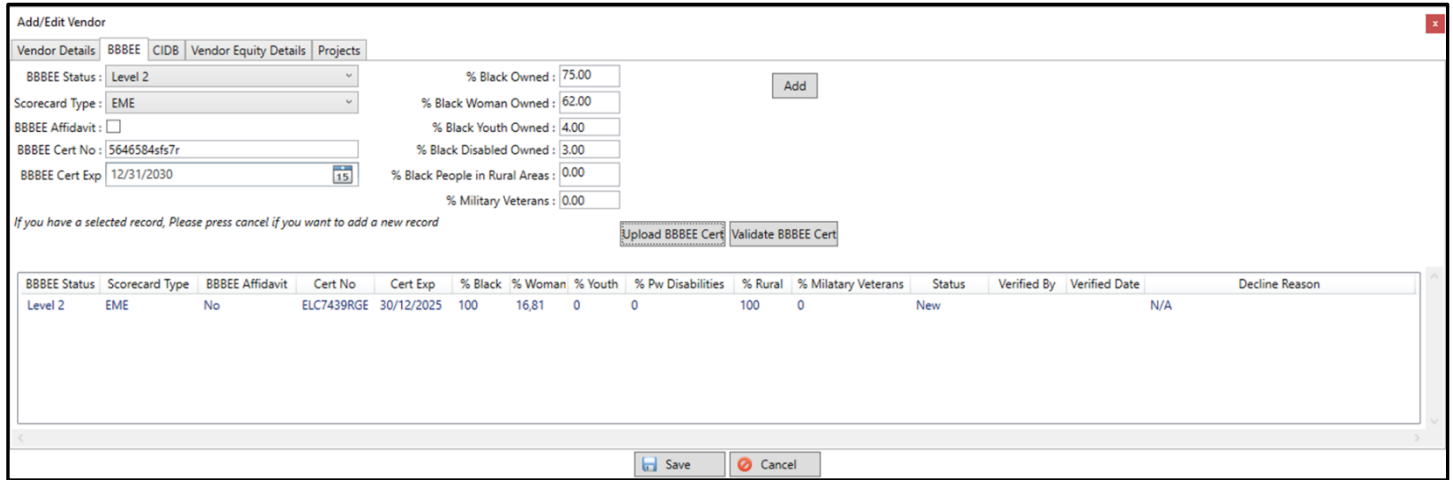


Figure 89: BBBEE workflow

To enable the software to keep history of BBBEE data a new tab was added for the capturing of 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	Decline Reason
Level 2	EME	No	ELC7439RGE	30/12/2025	100	16,81	0	0	100	0	New		N/A	

Figure 90: 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 Validate BBBEE Certificate to validate the data against the document uploaded
- iv. If no errors found you can click on Save
- v. If any errors or discrepancies are found the system will inform you of these errors.

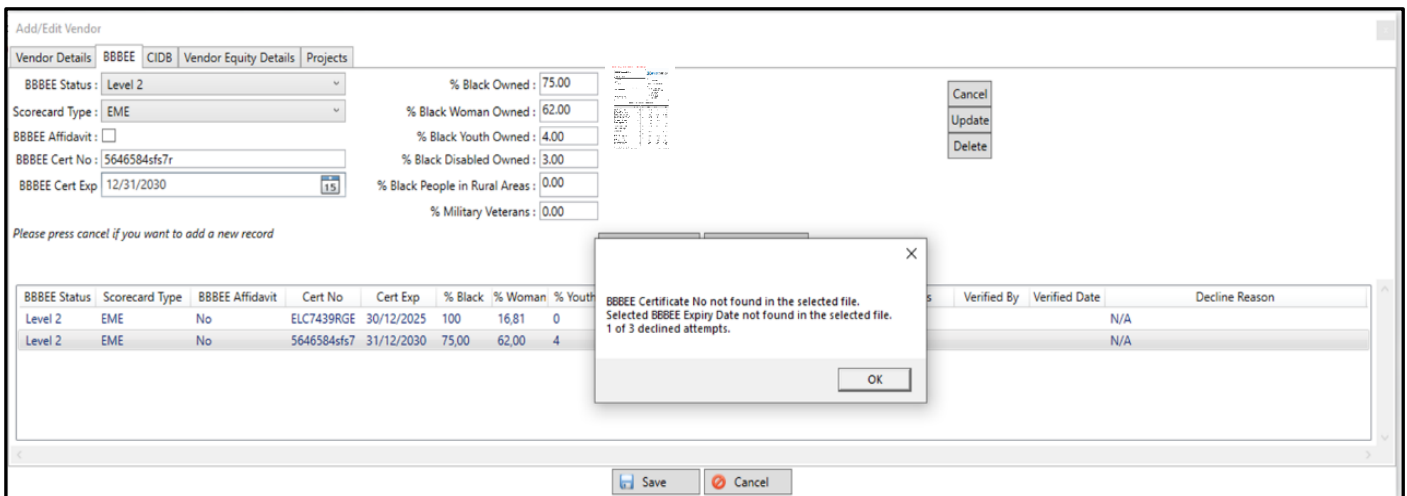


Figure 91: BBBEE Certificate with errors

- vi. Please check that your document uploaded is correct and that the data has been captured correctly. You must validate the data three times, if after the third attempt there are still errors, you can request manual verification by clicking on save.
- vii. Click on Add

**EDIT BBEE CERTIFICATE**

BBEE Status	Scorecard Type	BBEE Affidavit	Cert No	Cert Exp	% Black	% Woman	% Youth	% Pw Disabilities	% Rural	% Military Veterans	Status	Verified By	Verified Date
Level 4	EME	False	BBE25637/2C	01/04/2022	80,00	30,00	0	10,00	0	0	New		

Figure 92: BBEE tab

- i. To edit a BBEE 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. If info was updated, click on Validate BBEE Certificate to validate changes made
- v. 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](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 wonder stone)  
 25120 Quarrying: Limestone and lime works  
 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  
 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

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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 another 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.

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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
- 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

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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

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- 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 BBBEE 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

- i. Click on the Vendors / Service Providers Tab
- ii. Enter the Vendor name in the Text field
- iii. 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.** ← Type the Vendor name

ABC 


Vendor Name	Company Reg.	VAT Reg.	Contact Person	Telephone	E-Mail
ABC Training Academy	Unknown or N/A	No	Hennie	01125654	hennie@
ABC Sweets	Unknown or N/A	No	Herman	01253264	herman@

Results matching what you have typed in the text box

Figure 93: Search for a vendor

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

## 9.3. Link existing Vendor / Service Provider to a project

- i. Click on the Vendors / Service Providers Tab
- ii. Enter the Vendor name in the Text field
- iii. 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.** ← Type the Vendor name

ABC

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 94: Search for a vendor

- iv. You may get a few results matching what you have typed in
- v. 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 : Select

Service Provider Type : Select

Linked to Vendor : Select

: CPG Vendor


Appointment Date : Select a date 15

Add

Save Cancel

Figure 95: Link vendor to a project

- vi. 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

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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 14 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


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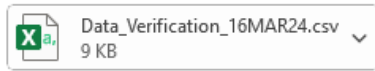
#### 9.4. Vendor Data Verification

As part of the audit requirements all vendor information must be verified by SANRAL. The following data will be verified by SANRAL:

- **BBBEE Certificate/Affidavit:** All data captured on the BBBEE certificate/affidavit will be verified against the uploaded document.
- **CIDB Certificate:** All data captured on the CIDB certificate will be verified against the uploaded document.

If any of the details are not correct the data will be declined with a reason for the decline. A daily email will be sent with all the information of the declined records.

 <p><b>SANRAL</b> SOUTH AFRICAN NATIONAL ROADS AGENCY SOC LTD BUILDING SOUTH AFRICA THROUGH BETTER ROADS</p>	<b>Integrated Transport Information System</b>		Document #:	Rev.:
	Title: <b>ITIS Desktop Project Information Module – User Manual</b>			



Good day,

Please find attached data to be corrected.  
 Attached data has been declined by the Data Verification process.  
 Open attachment for more information.

[itisweb@nra.co.za](mailto:itisweb@nra.co.za)

\*\*\*\*  
 D: | M:  
[itisweb@nra.co.za](mailto:itisweb@nra.co.za) | [www.sanral.co.za](http://www.sanral.co.za)  
 Fraud Hotline Number - 0800 204 558



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Figure 96: Data Verification Email

The above email will be sent to the user that created the vendor as well as all users that capture any invoices against the vendor.

Please see 9.2 Edit a vendor on how to edit and correct the invalid data of the vendor.