CATHSSETA INTEGRATED MANAGEMENT SYSTEM (CIMS)

CSV FILE

USER TRAINING MANUAL

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1. INTRODUCTION

1.1 Overview of the Integrated Management System

The CATHSSETA is a public entity established in terms of the Skills Development Act 97 of 1998. CATHSSETA aims to promote economic and employment growth, social and economic development, redress inequalities in education and training and to facilitate and advance employment equity in the Culture, Arts, Tourism, Hospitality and Sports sectors.

CATHSSETA has developed the CATHSSETA Integrated Management System – **CIMS.** CIMS is based on the business processes and is designed to enable the CATHSSETA to implement the National Skills Development Plan 2030 more effectively.

CIMS has the following core functional modules:

1. **Skills:** The Skills Module gathers information and data from employers/entities about the organisation, workplace skills planning and the implementation of training. This information and data is used to process mandatory or discretionary grant applications, in line with CATHSSETAs Grants Policy. In addition, some of the data collected from employers is used in CATHSSETAs sector skills planning and research activities as well as for monitoring and evaluation.
2. **Finance:** The Finance Module focuses on mandatory grant payment, and discretionary grant disbursement in line with grants regulations that govern the payment and utilisation of levies and the CATHSSETA Grants Policy.
3. **ETQA:** The ETQA Module focuses on managing skills programme registration, qualification development, learnership registration, learning programme material management, workplace approval and mentor registration, skills development provider accreditation management, assessor and moderator registration and management, management of industry funded learners, provider monitoring, learner certification, and learner management.
4. **Projects:** The Projects Module supports the management of the CATHSSETA's funded projects.
5. **Reporting:** CIMS reporting functionality supports CATHSSETA's to decision-making as well as reporting to the DHET

## 1.2 Purpose of this User Manual

This document provides a guide on how to convert CSV Files and resolve CSV File Errors
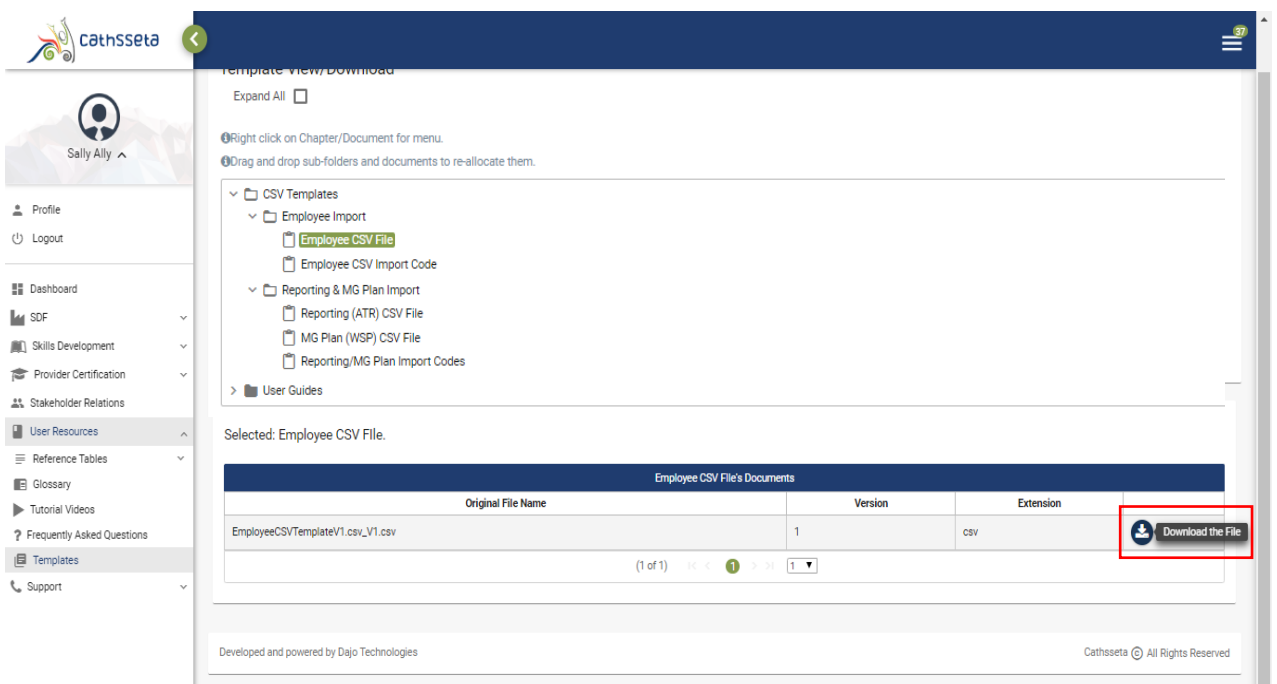
1.3 System Requirements

CIMS can be accessed using any browser and requires good Internet connectivity.

2. CONVERTING A CSV FILE

1. In your profile, navigate to and click **User Resources** on the left-hand pane. Click on Templates, then click on the small arrow next to CSV Templates.

2. You will see Employee Import or Reporting and MG Plan Import, click on the small arrow to view the desired CSV File Templates.
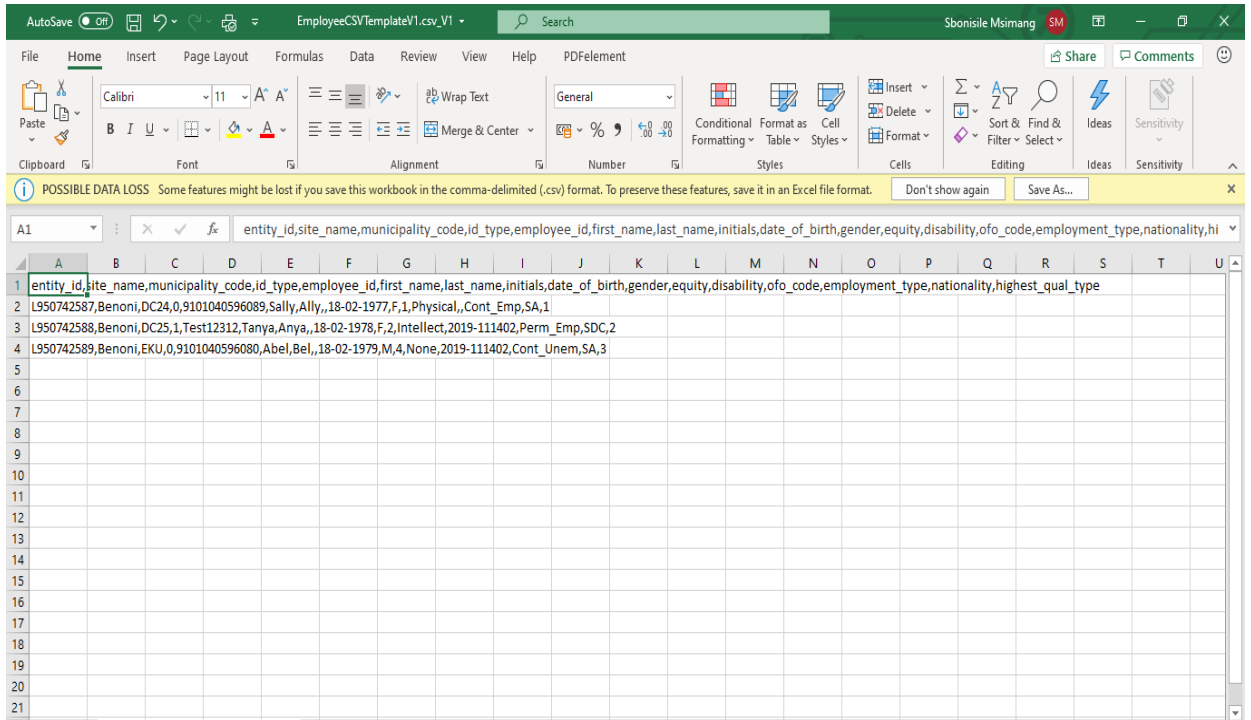
3. Click to select the required CSV File.
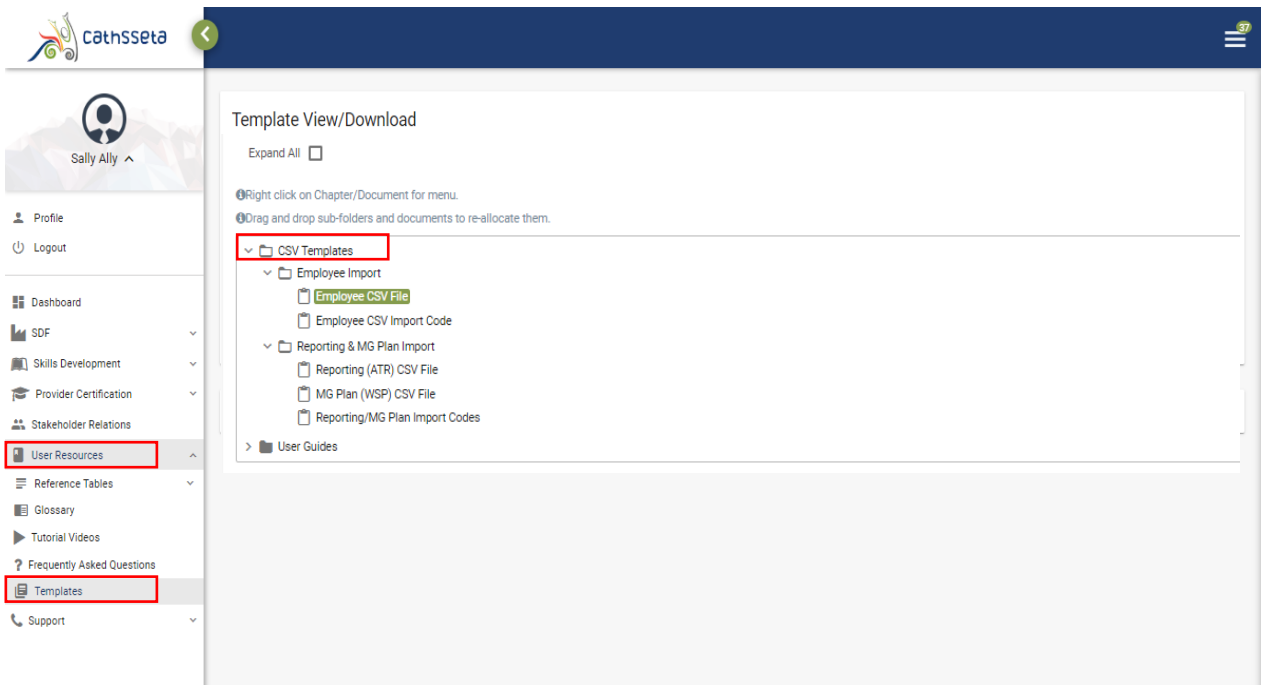
4. Scroll down and click to download the CSV File Template.

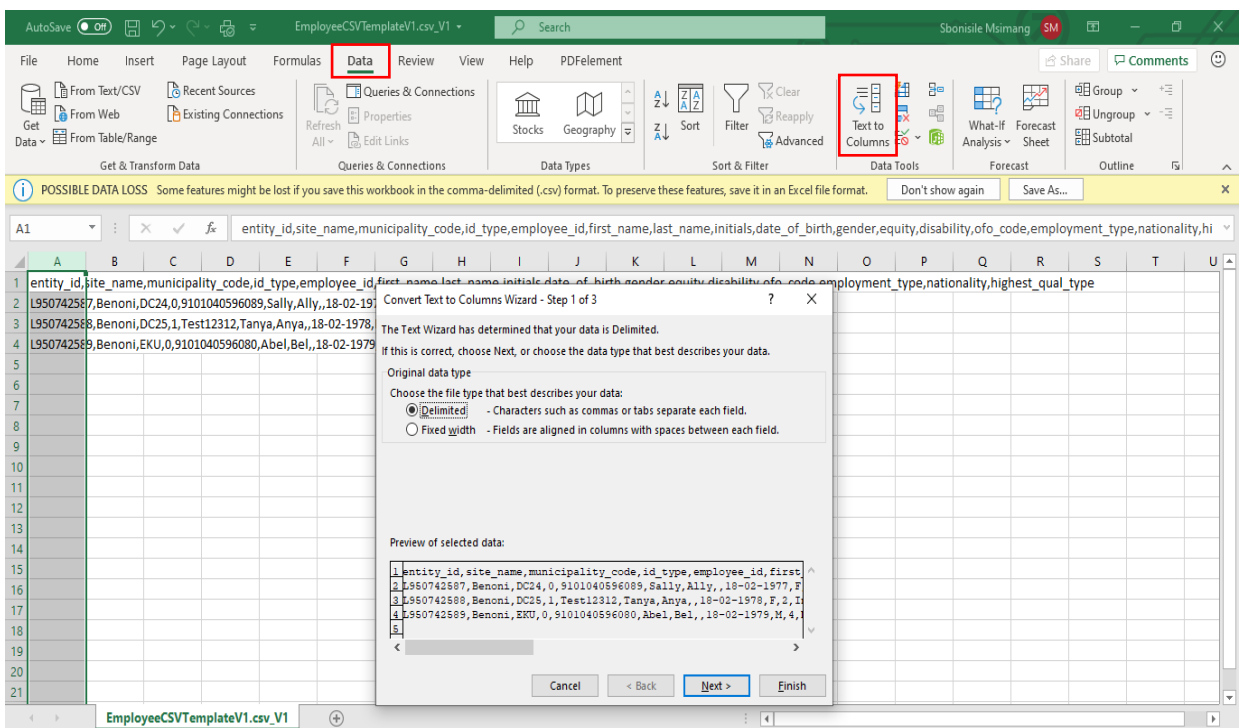5. You can also download the specific codes to complete the CSV File Template

6. Upon opening the downloaded CSV File Template, you will notice that the text is in Column A and is Separated by Commas.

7. To convert the Comma Separated text to be separated into its various columns follow these steps:

   a. Select Column A
   b. Click on Data in the menu bar
   c. Click Text to Columns
   d. A Dialogue Box will appear, ensure that "Delimited" is selected then click next

2. CONVERTING A CSV FILE

8. Select "Comma" then click next.

9. Click Finish, and the Comma separated text will be separated into columns.
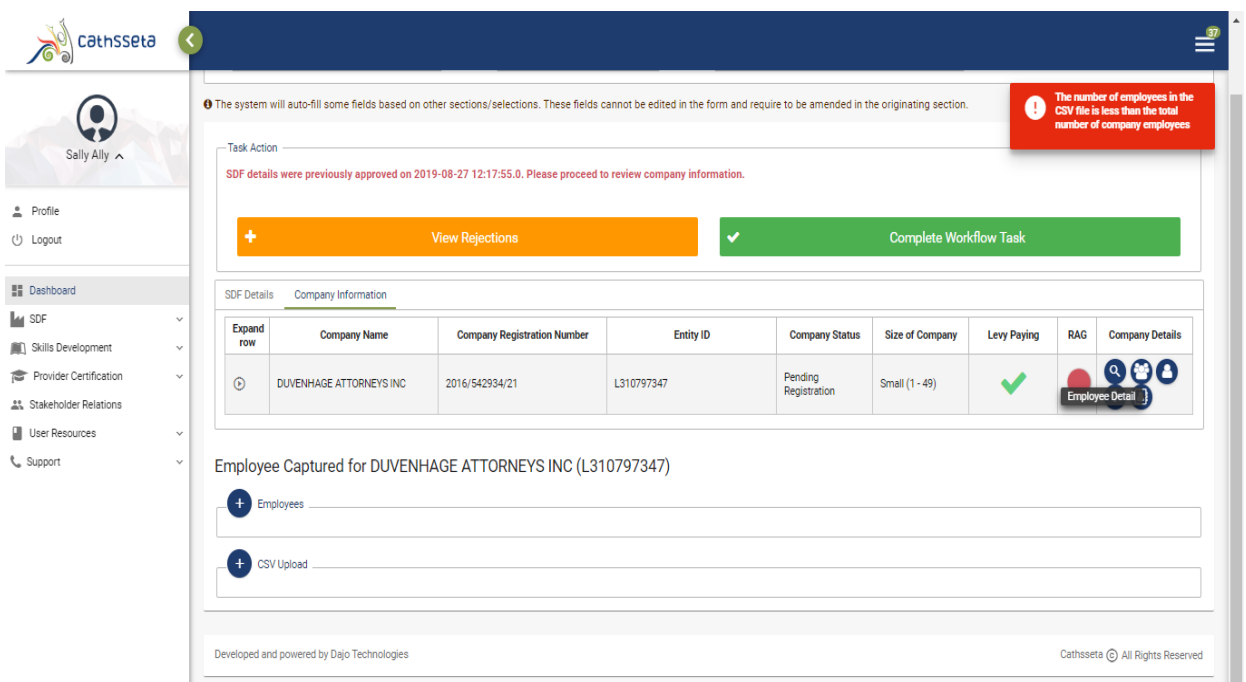
3. CSV FILE ERRORS

10. CSV File may be caused by a variety of reasons including but not limited to:
    a. Incorrect CSV File Headings used
    b. Incorrect CSV File Import Codes Used
    c. The CSV File Text is separated by Semicolons instead of Commas
    d. Number of Company Employees does not match the number of employees in the CSV File
    e. Incorrect CSV File Format
    f. Creating spaces or adding additional lines in the CSV File

<u>It is important to maintain the same CSV File Format and Headings as per the provided CSV Template</u>

11. To resolve this CSV File Error, ensure that the number of Company Employees does not match the number of employees in the CSV File.

12. If the number of Company Employees matches the number of employees in the CSV File, then ensure that:
    a. You are using the correct CSV File Format
    b. You have not spaces or adding additional lines in the CSV File

13. Upon making the required corrections re-upload the file.

14. If the CSV File data has error, a red icon will appear next to the data entry.

15. Click on the red icon to find out what error have been identified. You can also click to download a file which indicates the errors in each data entry.

16. You can also delete or update the entry or delete all the entries.

17. Once you have updated the entry click submit and the data entry will appear in a different table, which indicates that all errors in that entry have been resolved.
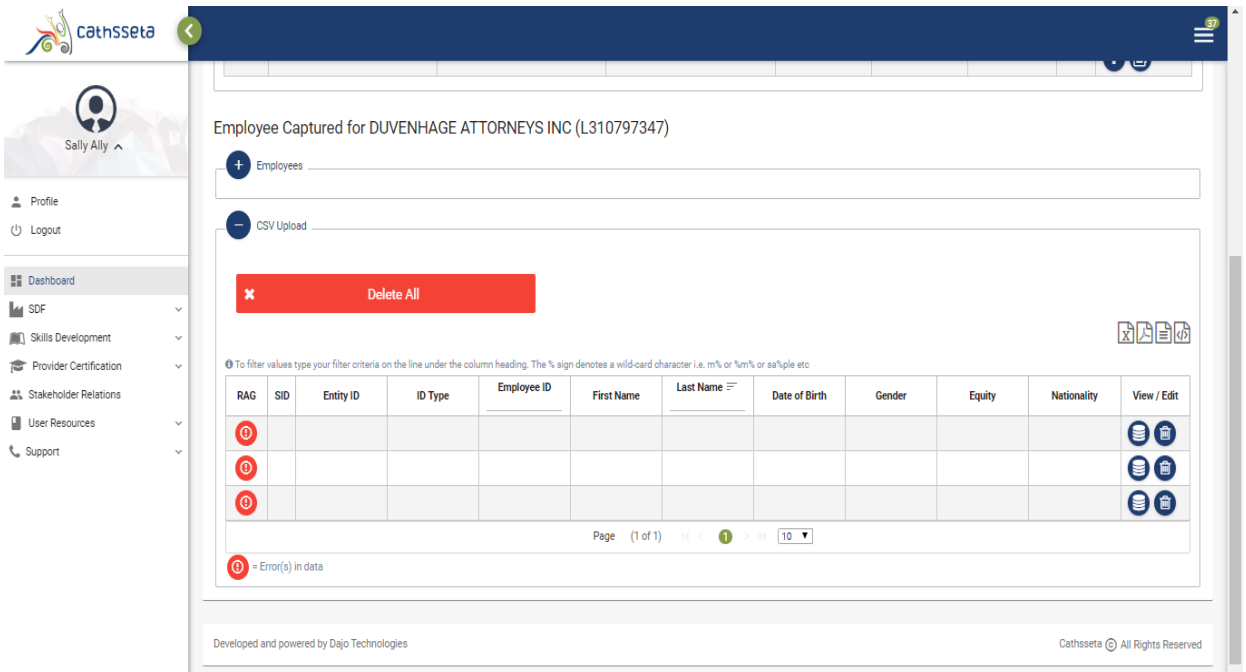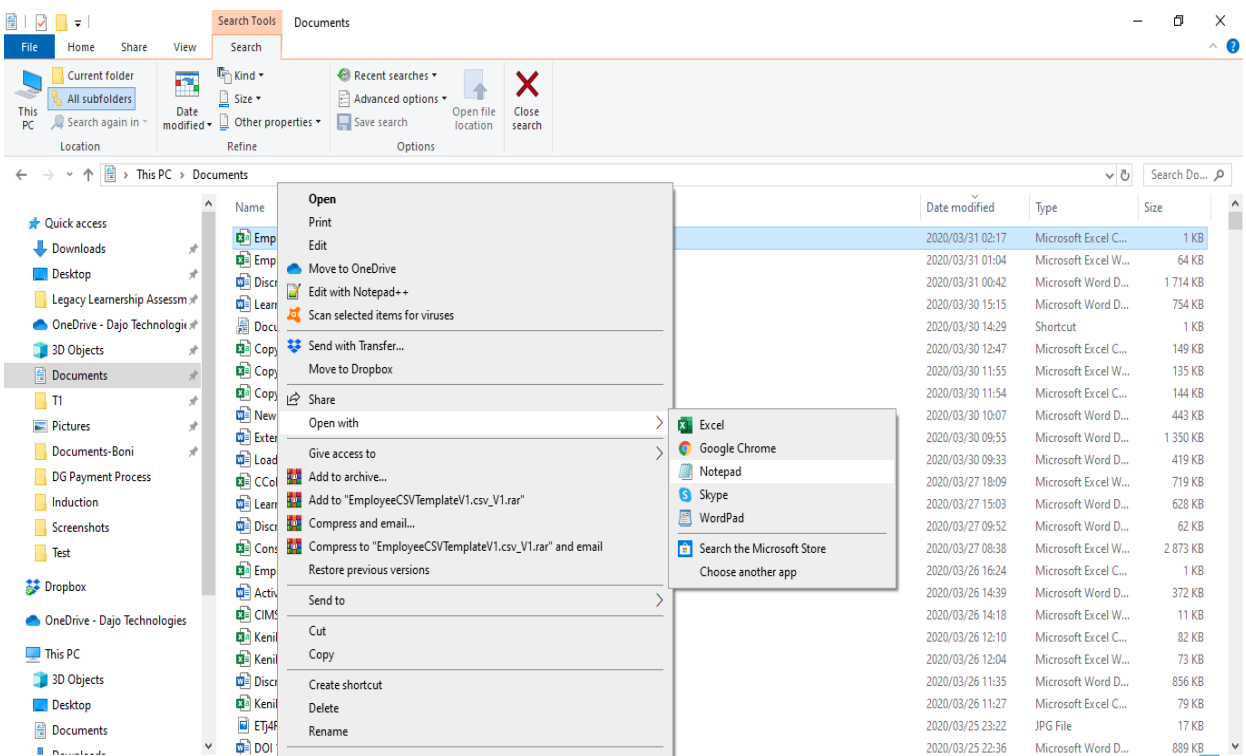
3. CSV FILE ERRORS

18. If this error occurs, it means that the CSV File text is separated by Semicolons instead of Comma.

19. To replace the Semicolons with Commas. Follow these steps
    a. Right Click on the file , then click to open the file with Notepad.

3. CSV FILE ERRORS

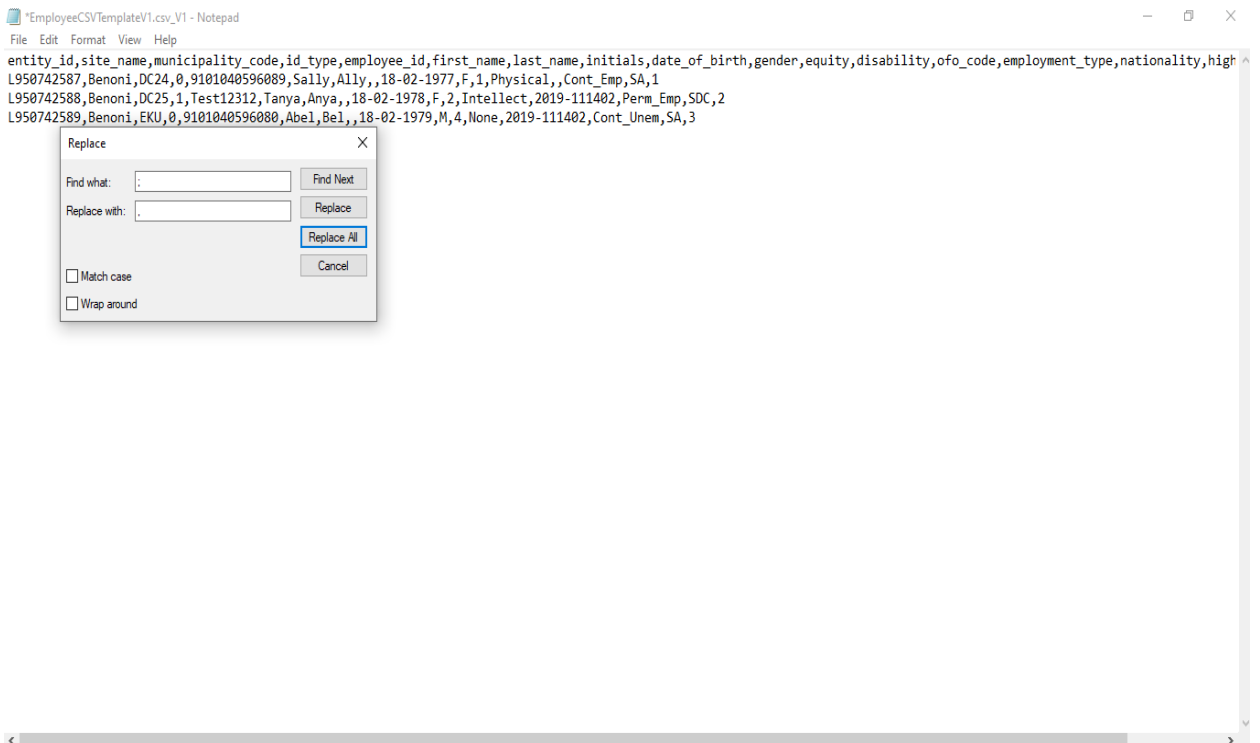20. You will notice that the file is text is separated by Semicolons.

21. Click Edit, then select Replace.

22. In the space that reads Find what enter **;** and in the space that reads Replace **,**
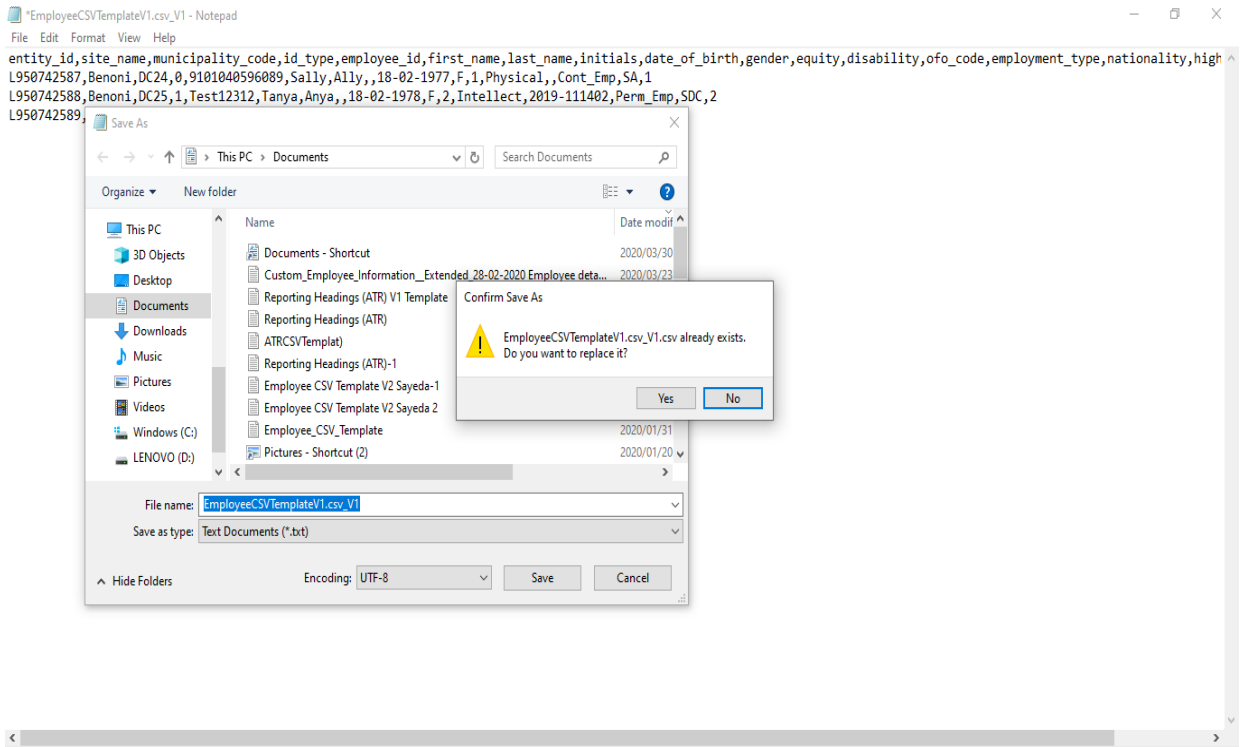
23. Click replace all. The ; will be replace with ,

24. Close the pop-up and you will notice that the Semicolons have been replaced with Commas.

3. CSV FILE ERRORS

25. Click File, Save as and save the file.

26. A notification indicating whether you want to replace the csv file will appear click yes.

27. Close Notepad and re-open the CSV File. You will notce that the CSV File will be in tis format.

28. Upload the CSV File.