



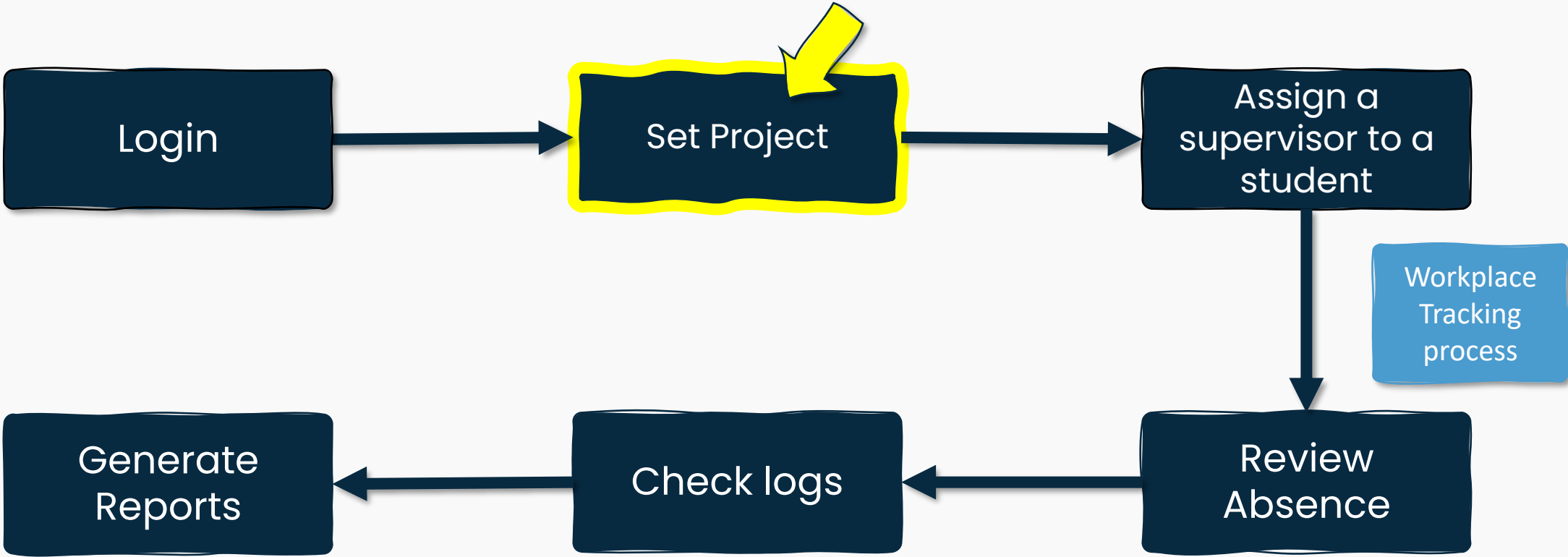
# WPT MANUAL

# Managers Guide

## Setting up the project



# Process Flow





## **Before You Start: Why Project Configuration Matters**

Project configuration is the most important initial step in the WPT system.

This is where the manager defines key project settings, such as hourly wage, non-working days, and other essential rules. These settings directly affect how the system calculates student payments, working time, and days off. Your simple inputs influence a network of underlying rules and calculations within the system. If the project is not configured correctly, students may not be able to register or use the system properly.

Project settings can be adjusted later for individual students if needed.



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## Work Placement Tracker Demo - 2026 (wt26wb) Export User Data

- Overview
  - Learning Programme Names
  - Profiler Managers
  - Recent Activity
  - Unattached Users
- OVERALL REPORTS
  - Activity
  - Activity Analysis
- SURVEY REPORTS
  - Responses
- ADVANCED
  - Automatic Reports
- WORK PLACEMENT TRACKER**
  - Set Projects**
  - Reports
  - Send Supervisor Reminder (only for superusers)
- System Details
  - Code: wt26wb
  - Name: Work Placement Tracker Demo -

Activity (Total users = 23) By organisation

Organisation	Active Users
Ex1	23
Ex2	0
Ex3	0
Ex4	0
Ex5	0
Ex6	0

Learning Programme Names

- Course Example 1 Ex1 >
- Course Example 2 Ex2 >
- Course Example 3 Ex3 >
- Course Example 4 Ex4 >
- Course Example 5 Ex5 >
- Course Example 6 Ex6 >

Add/Edit Learning Programme Names

By month

Month	Active Users
May	0
Jun	0
Jul	1
Aug	2

After logging in, you will see the main Management Centre view (top-level overview of your organisation).

In the left-hand menu, go to **WORK PLACEMENT TRACKER** and click **Set a Project**.



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Set Projects

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+ Create New Project **Set Bank Holidays**

Display Order	Project Name	Contract Reference Number	Start Date	End Date	Payment Day	Monthly Stipend Amount	Approved Hourly Rate	Document Submission Deadline Day	Working Days Per Week	Working Hours Per Week	Leave Days				Can Work On Weekends	Sho to Use
											Annual (Day per 17 working or entitled to be paid days)	Sick First 6 months (Day per every 26 days worked)	Sick After 6 months (Calculated based on the formula)	Maternity (Days per project)		

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If you are accessing this section for the first time, you need to configure holidays and weekends. This setup is done only once and does not need to be repeated for each new project. It is a global setting that applies to the entire system.

Click on **Set Bank Holidays**



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Set Projects

### Set Bank Holidays

< 2026 >

Select All Weekends
  Deselect All Weekends
  Deselect All
  Auto-Fill Holidays

Left click: **Public Holiday (paid)**  Right click: **Weekend / Non-working day**

Public holidays on Monday to Friday are fully paid

January							February							March						
Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su
			1	2	3	4							1							1
5	6	7	8	9	10	11	2	3	4	5	6	7	8	2	3	4	5	6	7	8
12	13	14	15	16	17	18	9	10	11	12	13	14	15	9	10	11	12	13	14	15
19	20	21	22	23	24	25	16	17	18	19	20	21	22	16	17	18	19	20	21	22
26	27	28	29	30	31		23	24	25	26	27	28		23	24	25	26	27	28	29
														30	31					

Weekends and public holidays in South Africa are set up automatically.

If any adjustments are needed and you want to add or remove a weekday holiday, right-click on the selected day.

All public holidays falling between Monday and Friday are paid for students in accordance with the BCEA.

If all is correct click on **Save**.



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### Set Projects

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**+ Create New Project** | Set Bank Holidays

Display Order	Project Name	Contract Reference Number	Start Date	End Date	Payment Day	Monthly Stipend Amount	Approved Hourly Rate	Document Submission Deadline Day	Working Days Per Week	Working Hours Per Week	Leave Days				Can Work On Weekends	Sho to Use
											Annual (Day per 17 working or entitled to be paid days)	Sick First 6 months (Day per every 26 days worked)	Sick After 6 months (Calculated based on the formula)	Maternity (Days per project)		

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To set up a Project  
Click on **Create New Project**





The hourly rate is essential for accurate monthly payment calculations.  
(Detailed information on the next slide.)

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Set Projects

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+ Create New Project Set Bank Holidays

Display Order	Project Name	Contract Reference Number	Start Date	End Date	Payment Day	Monthly Stipend Amount	Approved Hourly Rate	Document Submission Deadline Day	Working Days Per Week	Working Hours Per Week	Leave Days			
											Annual (Day per 17 working or entitled to be paid days)	Sick First 6 months (Day per every 26 days worked)	Sick After 6 months (Calculated based on the formula)	Maternity (Days per project)
0					10	0	0	10	5	40	1.25	1	[Number of days the person work during the week] x [6 (weeks)] – [any days that was taken during the first 6 months]	120

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## Project setting options

Values from the underlined settings are required for the system's calculations.

**1. Project name** – set the specific name of the project. Make sure the project name is clear and descriptive enough to be easily recognized by learners among other projects.

**2. Contract reference Number** – set the specific reference number of the project

**3. Start Date – End Date** – set general dates of the project

**4. Payment Day** – set the date of the payment

Monthly Stipend Amount

**5. Approved Hourly Rate** – set the hourly rate in this project (do not subtract UFI – will be automatically deducted in the monthly report.

**6. Document Submission Deadline Day** – This is the deadline by which documents for the previous month must be submitted and approved. Automatic reminder emails will be sent to supervisors on the first day of the following month, 5 days before the set deadline, 2 days before it, and on the deadline day.

**7. Working Days Per Week** – The number of working days per week that students are suppose to be present at work according to that project.

**8. Working Hours Per Week** – The maximum number of working hours per week. If a student reports more hours than set here, any excess will not be counted.



## 9. Leave days:

**Annual:** A system rule that accrues X days (default: 1.25 – can be edited) for every 17 days worked or entitled to be paid (e.g Annual Leave, Sick Leave, Family Responsibility Leave, Bank Holidays occurring during the week).

**Sick leave – first 6 months:** A system rule that accrues X days (default: 1 – can be edited) for every 26 days worked.

**Sick leave – after 6 months:** [The number of working days per week that students are required to be present at work] times [6 weeks] minus [any days that was taken during the first months]

**Maternity leave:** The maximum number of days possible in this circumstance for whole project (default: 120 – can be edited). This is unpaid leave and it pauses the project. For a person who takes such leave, the project should be extended in the individual project settings panel for that person.

**Family Responsibility Days:** The maximum number of days granted in this circumstance for whole project (default: 3 – can be edited). This is paid leave, but document must be provided.

**10. Can work on Weekends:** This setting determines whether weekend work is allowed and whether any weekend attendance is eligible for payment.

**11. Show to Users:** Set this option to Yes if the project should be visible to students and available for selection when they set up their account. Set it to No if, for example, the project has ended and should no longer be available for selection.



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### Set Projects

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	Payment Day	Monthly Stipend Amount	Approved Hourly Rate	Document Submission Deadline Day	Working Days Per Week	Working Hours Per Week	Leave Days				Can Work On Weekends	Show to Users	Order	Actions
							Annual (Day per 17 working or entitled to be paid days)	Sick First 6 months (Day per every 26 days worked)	Sick After 6 months (Calculated based on the formula)	Maternity (Days per project)				
	10	0	0	10	5	40	1.25	1	[Number of days the person work during the week] x [6 (weeks)] – [any days that was taken during the first 6 months]	120	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="button" value="↑"/> <input type="button" value="↓"/> <input type="button" value="✓ Update"/> <input type="button" value="Cancel"/>

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Once all project settings have been configured, scroll right and click on "Update".





# Well done,

you have successfully configured the  
project.

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If you have any questions contact us on:  
[ryancharles@learnerprofiler.com](mailto:ryancharles@learnerprofiler.com) or +27616802706

