UNIVERSITY OF THE WITWATERSRAND · HUMAN RESOURCES

Wits Engage user manual

How to use Engage, from the first time you sign in to the work each team does in its own dashboard. Find your part below, or search the contents for the task you have in mind.

Edition November 2026 **Address** engage.wits.ac.za **Sign in with** your Wits Microsoft account

Start here

1 **Everyone**
Sign in, find your way around, and keep your details up to date.

2 **New at Wits**
Complete your onboarding, upload documents and read the policies.

3 **Learning and growing**
Courses, skills, your development plan, bursaries and training.

4 **Recognition and feedback**
Thank a colleague, see milestones, answer surveys, talk to HR.

5 **Human Resources**
Staff records, onboarding progress, policies, surveys and access.

6–7 **Staff development (HRDU)**
Daily work, the competency framework, careers and learning impact.

8 **Benefits and service teams**
Medical aid, retirement fund, banking and campus access.

9 **Back office**
Accounts and roles, alerts, scheduled jobs, privacy and the audit trail.

Contents

Part 1 · Everyone **Getting started**

- Sign in
- Find your way around
- Switch between dashboards
- Get a page explained
- Notifications
- Your details
- Sign out
- Use Engage on your phone
- Get help

Part 2 · New at Wits **Your first weeks**

- Onboarding
- My Documents
- My Tasks
- Induction
- Policies

Part 3 · Every staff member **Learning and growing**

- Courses and training
- Your skills and qualifications
- Your plan, your career and bursaries
- Your portfolio and course feedback
- Sharing what you know

Part 4 · Every staff member **Recognition, surveys and feedback**

- Recognition
- Points and levels
- Surveys and feedback

Part 5 · Human Resources **For HR**

- Your HR dashboard
- Staff records
- New starters' onboarding
- Add an employee or invite someone
- Roles and access
- Policies and the Policy Guide
- Surveys and staff feedback
- Compliance, benefits and analytics
- Orientation sessions

Part 6 · Staff development (HRDU) **Staff development: the daily work**

- Your HRDU home
- The to-do list
- LinkedIn Learning licences
- The training calendar
- Development plans
- Staff bursaries
- SETA reports
- The learning catalogue

Part 7 · Staff development (HRDU) **Capability, careers and impact**

- How the figures are worked out
- The competency framework
- Skills and analytics
- Demand targets
- Pathways and careers
- Evaluation and impact
- People and records
- Communities and mentoring
- Policy governance

Part 8 · Benefits and service teams **Medical aid, retirement fund, banking and campus access**

- How the service queues work
- Medical aid
- Retirement fund
- Banking
- Campus access

Part 9 · Back office **Running Engage: the back office**

- The back office
- Check that Engage is healthy
- Alerts, errors and incidents
- People and access
- The services and jobs Engage relies on
- Announcements, maintenance and settings
- Privacy and the record of who did what

Reference **Words and contacts**

- Words used in this manual
- Who to contact

PART 1 · EVERYONE

Getting started

For every member of staff. How to sign in, find your way around, switch between dashboards, keep your details up to date, use Engage on your phone, and get help.

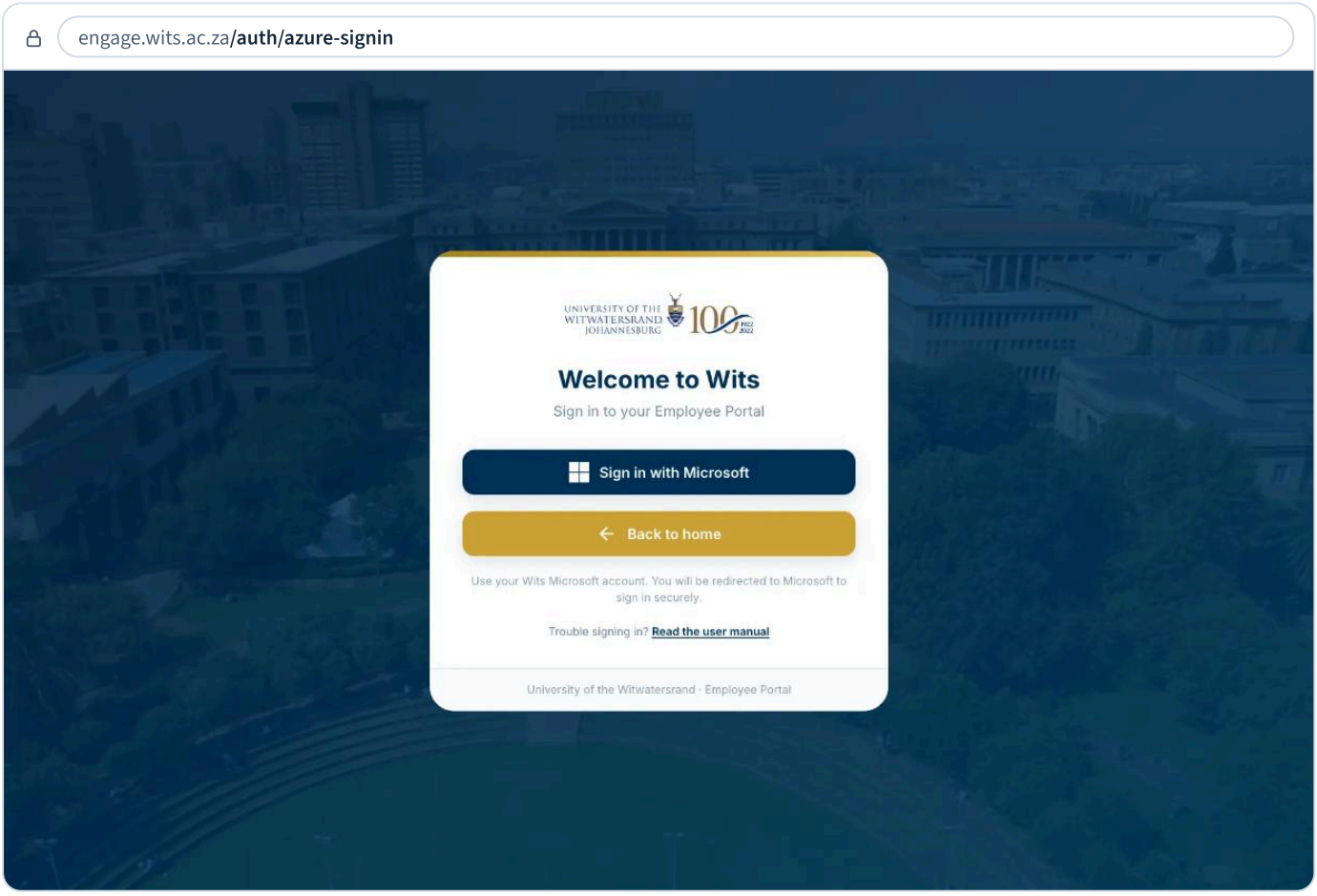
Sign in

For all staff · **engage.wits.ac.za**

You sign in to Engage with your Wits Microsoft account: your normal Wits account. Engage has no username or password of its own.

Sign in for the first time

1. Go to **engage.wits.ac.za** in your web browser. If the Engage front page opens, select **Sign in with your Wits account**, or **Sign In** at the top.
2. On the **Welcome to Wits** page, select **Sign in with Microsoft**.
3. Microsoft's sign-in page opens. Sign in with your normal Wits account details. If you are already signed in to Microsoft in this browser, this step may be skipped.
4. Engage opens on your home page.



The sign-in page. **Back to home** returns you to the Engage front page.

Most staff land on the **Employee Portal**. If you also work in HR or one of the service teams, Engage opens that team's dashboard instead. You can move to the Employee Portal at any time from the account menu (see Switch to another dashboard).

Get in when Engage will not open

- **Microsoft will not accept your password.** There is no separate Engage password to reset. It is your Wits account that needs attention: contact the ICT Service Desk (details under Contact the right people).
- **The sign-in page says "Authentication failed. Please try again."** Select `Sign in with Microsoft` again.
- **The page does not load from home.** You need to be on the Wits network on campus, or connected to the University VPN (the secure link to the Wits network from off campus). When Engage does not load from home, the VPN is usually the reason. The ICT Service Desk can set it up for you.

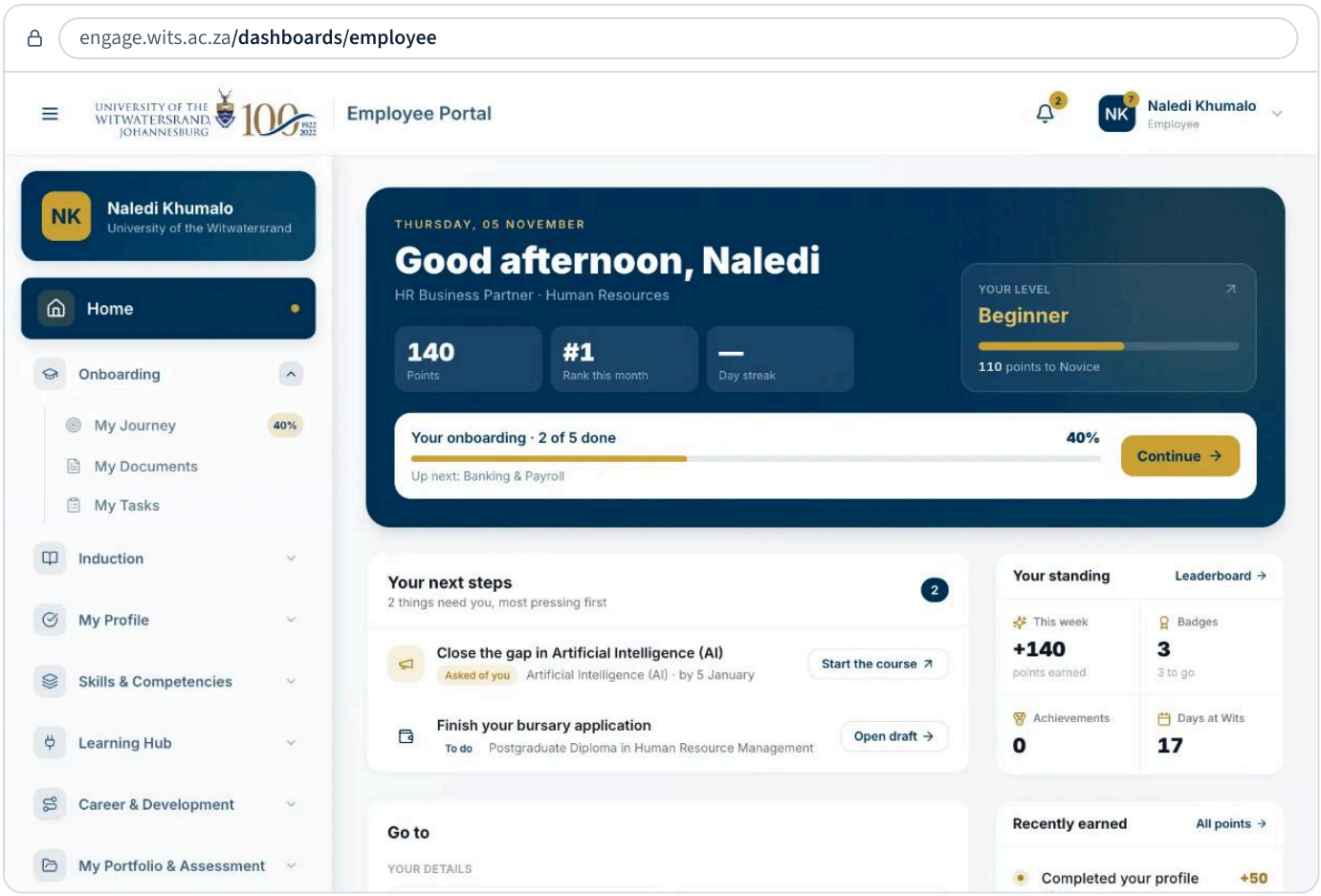
Find your way around

For all staff · **Home** in the menu

Every page in the Employee Portal has the same frame: a bar along the top, the menu down the left, and the page itself in the middle.

Read your home page

Home answers two questions: where do you stand, and is anything waiting for you? Open it at any time with **Home** at the top of the menu.



Home. The dark band shows your figures and your onboarding. Your next steps and Go to are below it, with Your standing on the right.

- **The greeting band** shows today's date, a greeting with your first name, and your position and department. Beneath them are your **Points**, your **Rank this month** on the leaderboard, and your **Day streak**. A dash means there is nothing to show yet: you have a rank only once you have earned points this month, the same as on the Leaderboard.
- **Your level** is worked out from every point you have ever earned, and says how many points you need to reach the next level. Select it to open My Points, which shows where every point came from.
- **Your onboarding** is the white strip inside the band, for as long as onboarding is unfinished. It shows how many of the five steps are done, the percentage, and the step that is **Up next**. Select **Start onboarding** or **Continue** to carry on (see Part 2). When all five steps are done, the strip shrinks to one line that points you to My Details.
- **Your next steps** lists everything waiting for you, most pressing first. Each line has a label (**Overdue**, **Asked of you** or **To do**) and one button that takes you to where the work is done. Things that are with someone else are listed underneath, under **Waiting on others**. When there is nothing, it says **You are all caught up.**
- **Coming up** appears only when you are booked on a training session that has not happened yet, or are on its waiting list. It lists up to three.
- **Go to** is a map of the Employee Portal in four groups: **Your details**, **Things to do**, **Learning** and **About Wits**. A red number on **Notifications** counts the ones you have not read.
- **Your standing** and **Recently earned** show the points you earned this week, your badges, and your latest awards. Part 4 explains points and recognition.

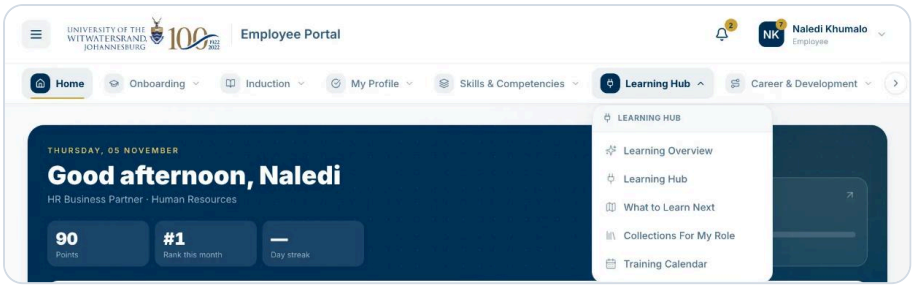
Use the menu

The menu down the left holds every page of the Employee Portal, in groups. Your name sits at the top of it, with **Home** underneath.

- Select a group's name to open it, and select it again to close it. Only one group is open at a time. Opening a group does not leave the page you are on.
- The group that holds the page you are on opens by itself and carries a gold marker, so you can always see where you are.
- While your onboarding is unfinished, **Onboarding** › **My Journey** shows your percentage, and the **Progress** card at the foot of the menu repeats it.

Menu group	What is in it	Explained in
Onboarding	My Journey, My Documents, My Tasks	Part 2
Induction	Welcome to Wits, Campus, Policies	Part 2
My Profile	My Details, Who Manages Me, My Team	Your details, below; Part 3
Skills & Competencies	My Competencies, What Is Expected of Me, My Skills, My Qualifications	Part 3
Learning Hub	Learning Overview, Learning Hub, What to Learn Next, Collections For My Role, Training Calendar	Part 3
Career & Development	My Development Plan, Development Pathways, My Career Progression, My Bursaries	Part 3
My Portfolio & Assessment	My Evidence Portfolio, Check My Knowledge, Did It Stick?, Rate My Courses	Part 3
Knowledge Sharing & Collaboration	Knowledge Transfer, Communities of Practice, My Contributions	Part 3
Recognition	Daily Recognition, Milestones, Leaderboard, Social Feed, Insights	Part 4
Feedback & Surveys	Surveys, Feedback to HR	Part 4
Help	Help & Support	Get help, below

To give the page more room, select the button with three lines at the far left of the top bar. The menu moves into a strip across the top, where each group opens as a drop-down list when you select it or point at it. If the groups do not all fit, select the arrow at the right-hand end of the strip to see the rest. Select the three-line button again to put the menu back down the side.



The menu as a strip across the top, with **Learning Hub** open.

GOOD TO KNOW

On a smaller laptop or a tablet, the menu slides over the page instead of sitting beside it, and closes by itself once you choose a page. Select the shaded page behind it to close it without choosing.

Use the top bar

- On the left: the menu button, the Wits logo and the name of the dashboard you are in. It is the same name the account menu uses for that dashboard.
- On the right: the bell, which opens your notifications, and your picture or initials with your name. The line under your name says which dashboard you are in, for example **Employee** or **HR Manager**. Select your picture to open the account menu.

GOOD TO KNOW

Announcements from Wits appear at the bottom of the screen. Close one with its cross and it stays away for the rest of your visit. An urgent announcement has no cross and stays until it is lifted.

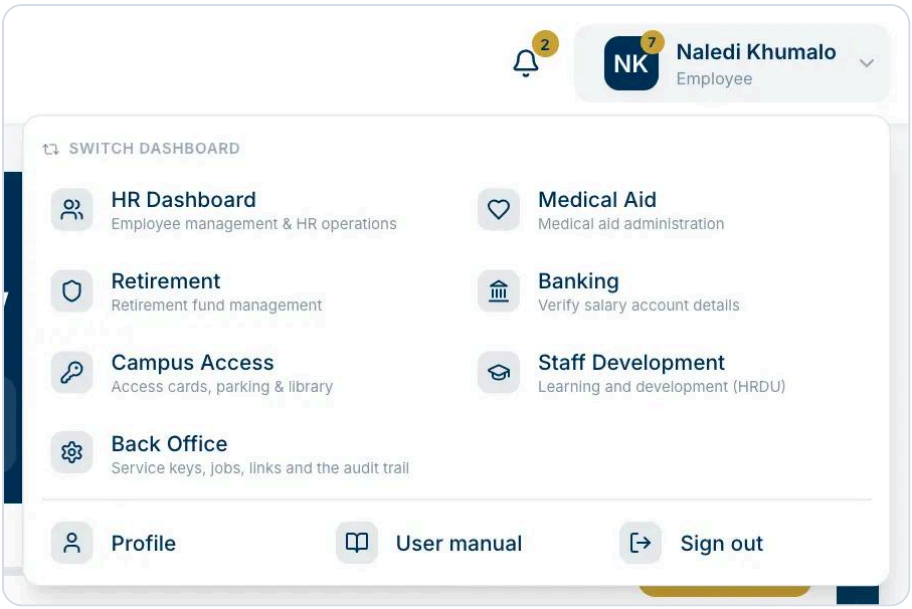
Switch between dashboards

For staff with more than one role · your picture, top right

Everyone has the Employee Portal. Each extra role you hold, such as HR or medical aid officer, adds a dashboard of its own for that work.

Switch to another dashboard

1. Select your picture or initials at the top right.
2. Under **Switch Dashboard**, select the dashboard you want.



The account menu. The number on the picture matches the number of dashboards listed under Switch Dashboard.

The dashboard opens with its own menu down the left. To come back, open the account menu again and select **Employee Portal**. The menu never lists the dashboard you are already in.

Dashboard	What the menu says it is for	Explained in
Employee Portal	Personal dashboard, onboarding & benefits	This part, and Parts 2 to 4
HR Dashboard	Employee management & HR operations	Part 5
Staff Development	Learning and development (HRDU)	Parts 6 and 7
Medical Aid	Medical aid administration	Part 8
Retirement	Retirement fund management	Part 8
Banking	Verify salary account details	Part 8
Campus Access	Access cards, parking & library	Part 8
Back Office	Service keys, jobs, links and the audit trail	Part 9

Understand the number on your picture

The small gold number on your picture counts the other dashboards you can switch to from where you are. With one extra role it shows 1. If you have only the Employee Portal, there is no number and the account menu has no **Switch Dashboard** section.

GOOD TO KNOW

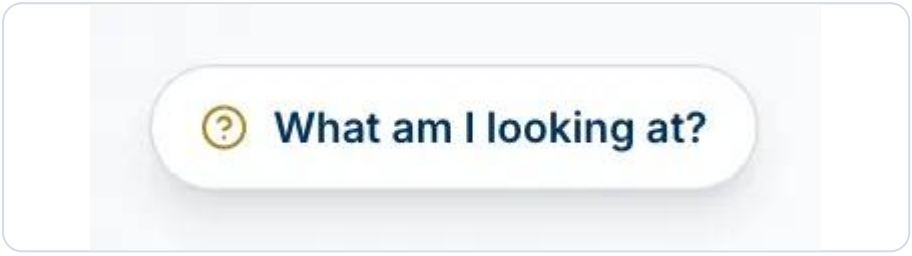
HRDU is the Human Resources Development Unit, the Wits team responsible for staff development. If a dashboard you need for your work is missing, roles are given in the back office (see Part 9).

Get a page explained

For all staff · **What am I looking at?** at the bottom right of the screen

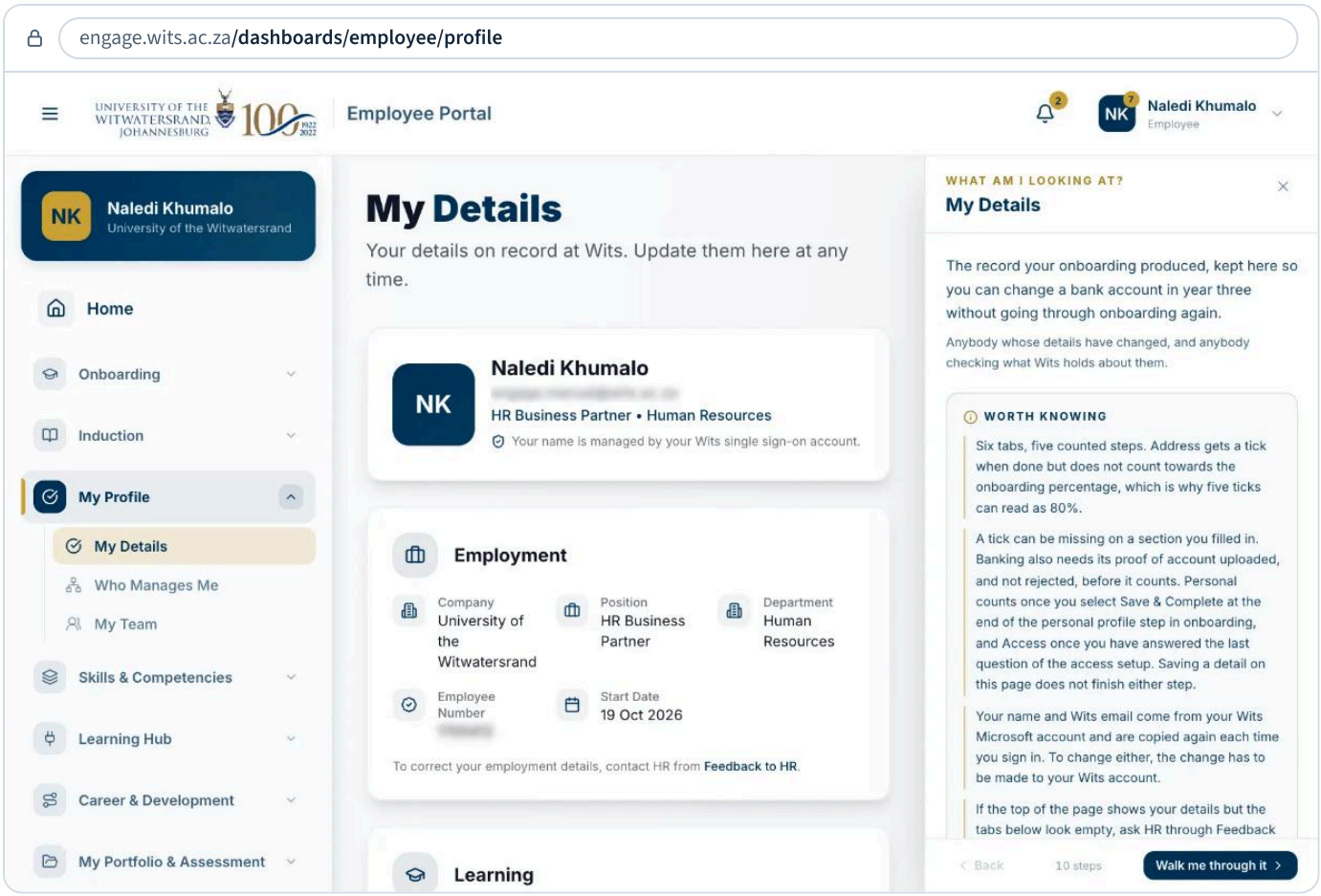
Every dashboard page has a button at the bottom right that opens a guide to the page you are on. On a phone it sits at the bottom left, just above the bar at the foot of the screen.

Open the page guide



The button that opens the page guide, at the bottom right of the screen.

1. Select **What am I looking at?** at the bottom right of the screen.
2. A panel opens down the right-hand side (on a phone, across the whole screen). It names the page, says what the page is for and who it is for, and lists anything **Worth knowing**.
3. To be shown round the page, select **Walk me through it** at the foot of the panel. Each step outlines one part of the page, scrolls to it and explains it. Use **Next** and **Back** to move between the steps.
4. To close the guide, select the cross at its top right, or press the Esc key.



The page guide for My Details. The foot of the panel says how many steps the walk-through has.

Some pages do not have a guide yet. On those, the panel says **No guide has been written for this page yet.**

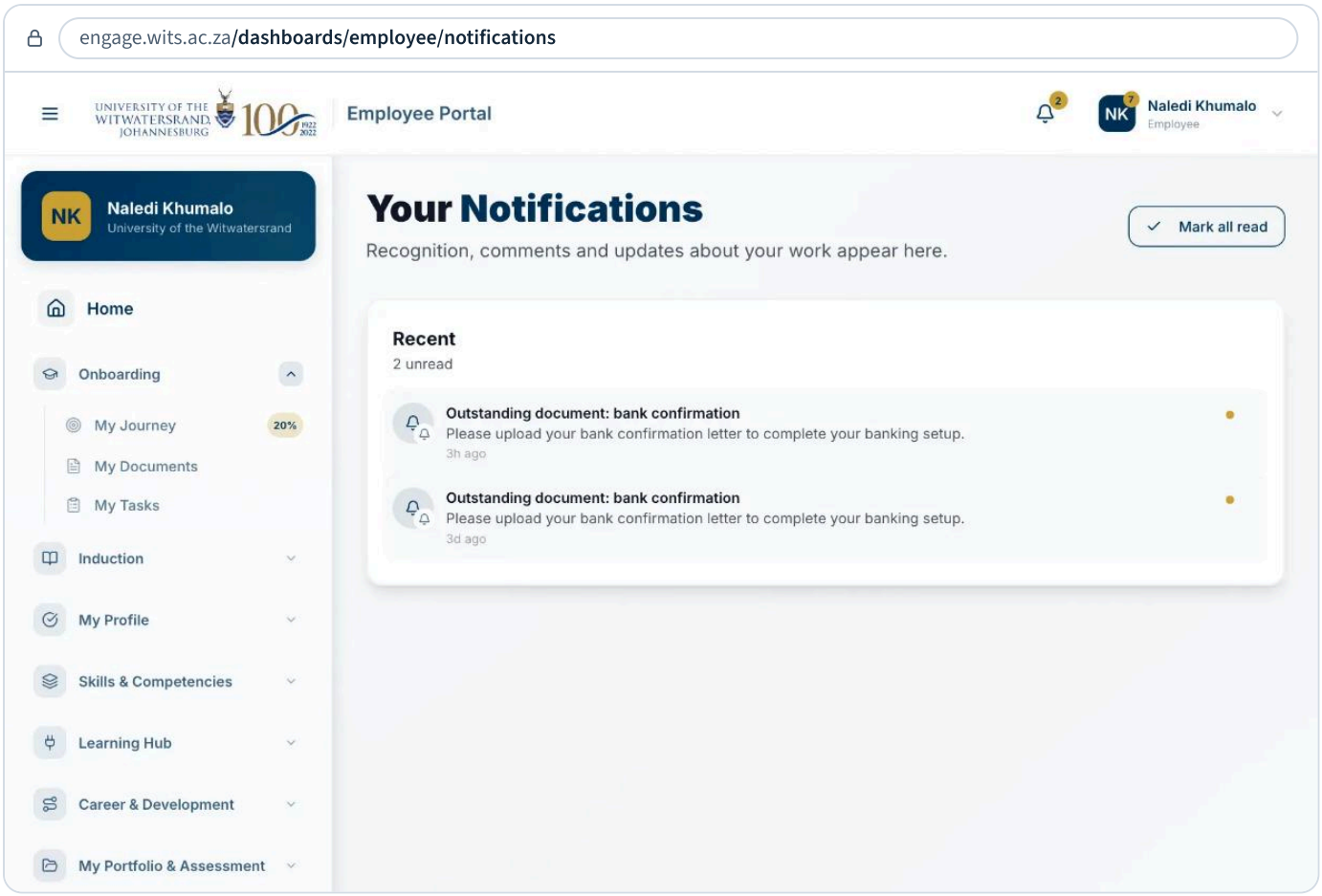
Notifications

For all staff · the bell at the top right of the screen

Engage tells you when something happens that concerns you: for example, when a colleague recognises you, a survey is sent to you, a new policy is published, or HR replies to your feedback.

See your notifications

1. Select the bell at the top right. A gold number on the bell counts the notifications you have not read (9+ means more than nine). You can also select **Notifications** under **Go to** on Home.
2. The **Your Notifications** page lists them newest first. Unread ones have a gold dot and a lightly shaded background.
3. Select a notification to open the page it is about. It is marked as read on the way.



Your Notifications when there is nothing new. Notifications appear in the Recent list, newest first.

- **Mark all read**, beside the page heading, clears every gold dot at once. It only appears while something is unread.
- To remove a notification, select the bin at its right. On a computer the bin appears when you point at the notification; on a phone or tablet it is always there. This removes only your copy. It does not undo what the notification was about.
- The page shows ten at a time. Use **Previous** and **Next** at the foot to see more.
- When you have none, the page says **You're all caught up — there are no notifications right now.**

GOOD TO KNOW

The bell is on every dashboard, so you can check your notifications from wherever you are working. Selecting it opens **Your Notifications** in the Employee Portal. The Back Office is the exception: the bell there shows the Back Office's own alerts (see Part 9).

Your details

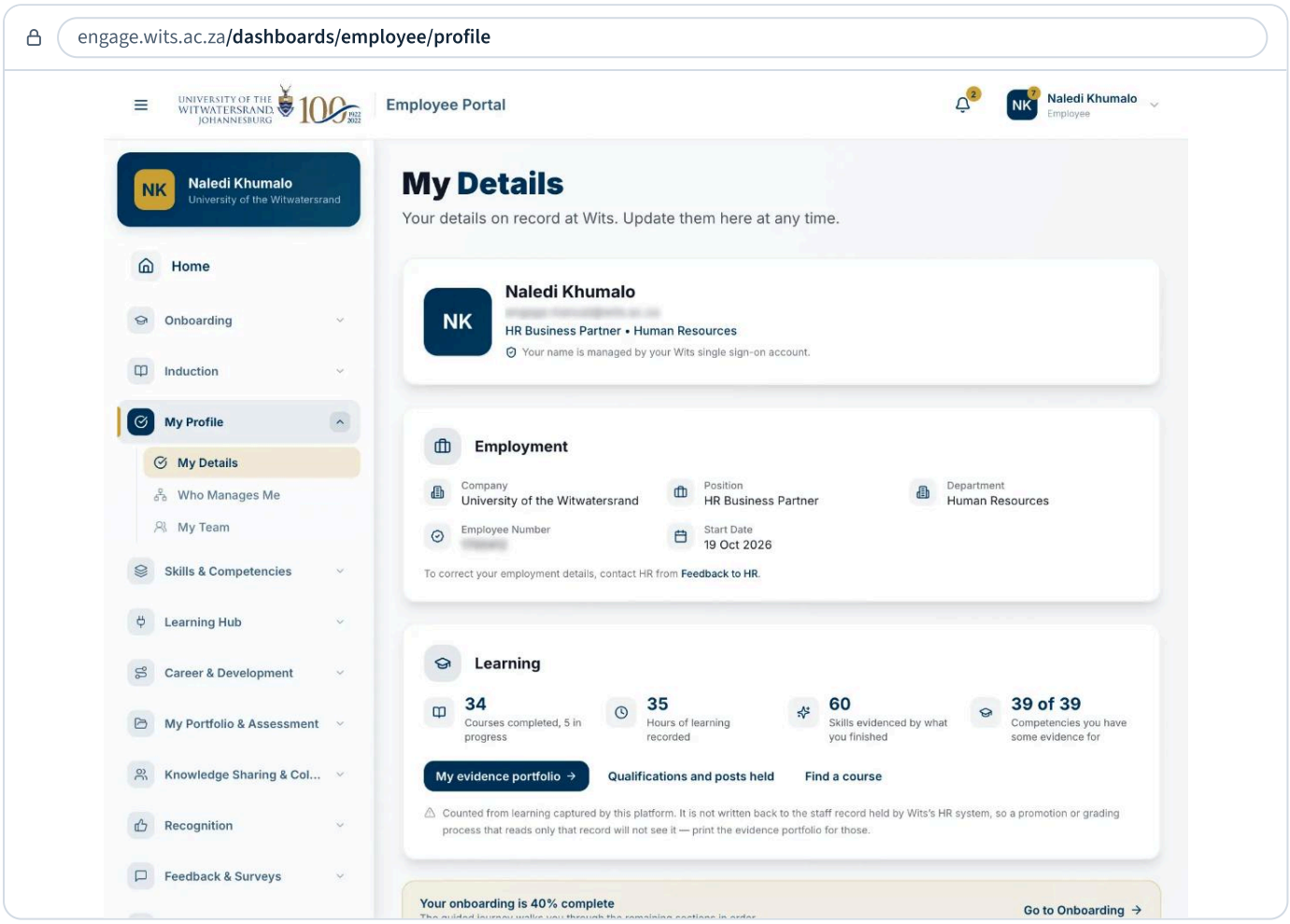
For all staff · **My Profile** › **My Details** in the menu

My Details shows what Wits holds about you: who you are, your employment, and the details you gave during onboarding. You can correct most of it yourself.

Check your details

1. Open **My Profile** › **My Details**. You can also select **Profile** in the account menu.

2. Check the top of the page: your picture or initials, your name, your Wits email, and your position and department. The note **Your name is managed by your Wits single sign-on account** means your name comes from your Wits Microsoft account.
3. Check the **Employment** card: **Company**, **Position**, **Department**, **Employee Number** and **Start Date**. An empty field reads **Not provided**, **Not assigned** for an employee number that has not been issued, or **Start date not recorded** until HR records your start date.
4. Select each of the six tabs to check the rest: **Personal**, **Address**, **Medical Aid**, **Retirement**, **Banking** and **Access**. A green tick on a tab means that section counts as complete for onboarding. On the Personal tab, the **Complete** or **Incomplete** label on Personal Details follows the same rule.



My Details. The Employment card is HR's record of you. The six tabs below it hold the details you can change, each card with its own **Edit** or **Add** button.

- While your onboarding is unfinished, a gold box says how far you have got. Select **Go to Onboarding** in it to work through the remaining sections in order.
- The **Learning** card below Employment counts the courses, hours of learning, skills and competencies recorded for you, with links to **My evidence portfolio**, **Qualifications and posts held** and **Find a course** (see Part 3). If no learning has been recorded for you yet, the card says so.

Update your details

1. Select the tab that holds the detail, for example **Address**.

2. Select **Edit** on the card you want to change. On the Personal tab the button is **Edit Profile**; where a card is still empty it says **Add**.
3. Make your changes and select **Save**. To leave without changing anything, select **Cancel**.

A short message confirms the save, for example **Profile updated successfully**.

Tab	What you can do there
Personal	Change your personal, contact and identity details, your next of kin and your dependants. Your first name, last name and email stay locked while you edit, because they come from your Wits Microsoft account.
Address	Change your residential and postal addresses.
Banking	Change the account your salary is paid into, and upload proof of the account. The label at the top of the card shows where the banking team's check stands: **Waiting for the banking team**, **Approved** or **Not approved**. When the team does not approve an account, their note is shown under the label.
Medical Aid	See your medical aid and where your application stands. To change it, use the top button under **Medical Actions**, which opens the medical aid form in onboarding. You can also upload a membership certificate here.
Retirement	See your retirement fund choice. To change it, select **Review Setup** (or **Complete Setup**), which opens the retirement fund form in onboarding. Your beneficiaries and your investment choice are steps in that form. For a fund statement, contact Remuneration, Pensions & Medical Aid (see Contact the right people).
Access	See your campus access and parking. To change them, select **Start Access Setup**, which opens the access form in onboarding, where you ask for your access card and parking. **ICT Service Desk** opens the ICT Service Desk's details on Help & Support.

The onboarding forms are explained in Part 2.

Ask HR to correct a detail you cannot change

- **Employment details** (company, position, department, employee number and start date) are HR's record of you, so you cannot edit them. To have one corrected, contact HR from **Feedback & Surveys** › **Feedback to HR** (see Part 4).
- **Your cell number** is on the Personal tab, under Contact Information. You can change it yourself with **Edit Profile**.
- **Your name and your Wits email** come from your Wits Microsoft account, and Engage copies your name again each time you sign in. That is why they stay locked under **Edit Profile**. A change has to be made to your Wits account itself.

Sign out

For all staff · your picture, top right

Sign out of Engage

1. Select your picture or initials at the top right.
2. Select **Sign out** at the foot of the menu.

3. Your browser asks **Are you sure you want to log out?** Select **OK**.

You return to the sign-in page. To come back in, select **Sign in with Microsoft**.

TAKE CARE

Signing out of Engage does not sign you out of your Microsoft account. On a shared computer, sign out of Microsoft in that browser as well. Otherwise the next person to select **Sign in with Microsoft** may be taken straight into Engage as you.

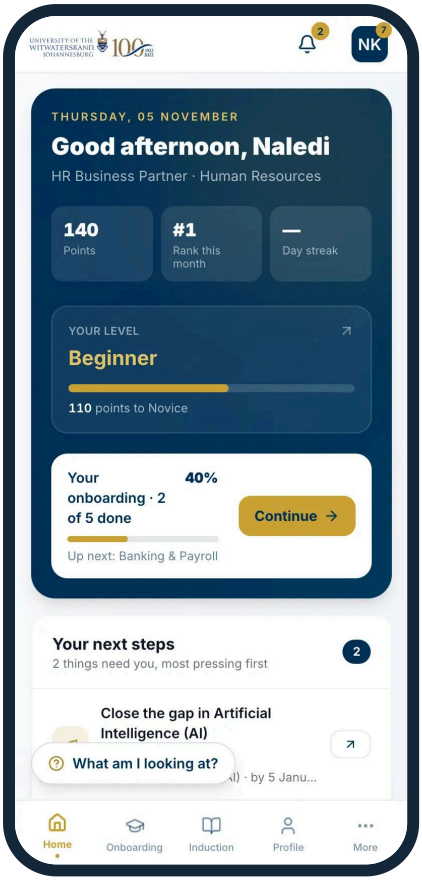
Use Engage on your phone

For all staff · **engage.wits.ac.za** in your phone's browser

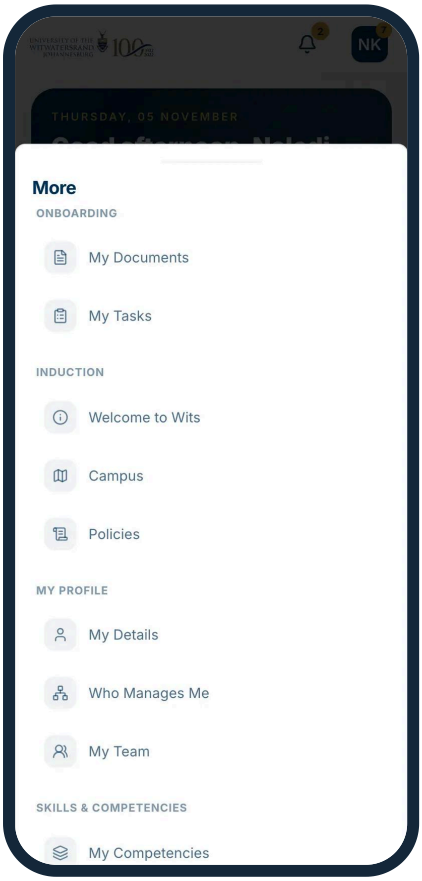
Open **engage.wits.ac.za** in your phone's web browser and sign in the same way as on a computer.

Move around on a phone

- **The top bar** holds the Wits logo, the bell and your picture. Select the logo to go Home. Select your picture for the same account menu as on a computer, with **Switch Dashboard**, **Profile** and **Sign out**.
- **The bar along the bottom** holds **Home**, **Onboarding**, **Induction**, **Profile** and **More**. The one you are in is gold.
- **More** opens the full menu, in the same groups as on a computer. Select a page to go there, or swipe the list down to close it.
- Home is a single column, and **Go to** becomes a grid of icons.



Home on a phone, with the bar along the bottom.



More holds every page of the Employee Portal.

Get help

For all staff · **Help** › **Help & Support** in the menu

Help & Support answers common questions about Engage, lists who to contact, and lets you send a question to HR.

Open this manual

This manual is on the Engage website at **engage.wits.ac.za/manual**. Anyone can read it, without signing in. You can reach it from:

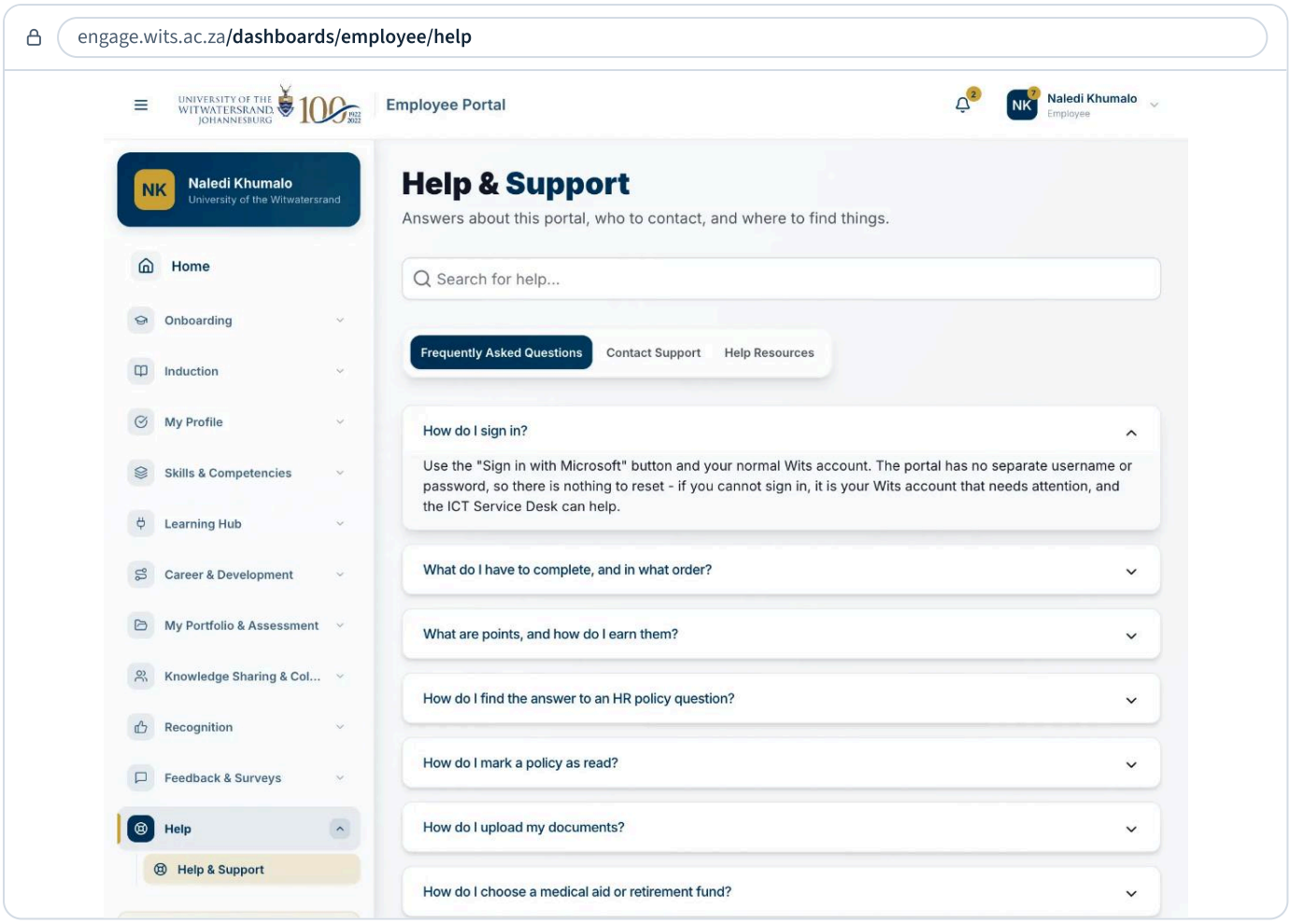
- the Engage front page: `User Manual` at the top of the page, and again in the footer;
- the sign-in page: `Read the user manual`, beside "Trouble signing in?";
- inside Engage: `User manual` in the account menu under your picture, on every dashboard and on a phone. It opens in a new tab, at the part written for the dashboard you are in;
- Help & Support: the `User manual` card under `Help Resources`.

To keep a copy, select `Download PDF` at the top of the manual. The PDF holds everything this page does, and prints on A4.

Open Help & Support

Open **Help** › **Help & Support**, at the foot of the menu. On a phone, select `More` in the bar along the bottom, then `Help & Support`. `View Complete Contact Directory`, on the `Contacts` tab of **Induction** › **Welcome to Wits**, opens the same page.

The page has three tabs: `Frequently Asked Questions`, `Contact Support` and `Help Resources`. Select a question to open its answer. The `Search for help...` box searches the questions only. `Help Resources` links to the places in Engage that help most, such as this manual, the Policy Guide and the Training Calendar.



Help & Support, with the answer to **How do I sign in?** open. Further down, **Can I use the portal from home?** explains the VPN.

Contact the right people

The **Contact Support** tab lists four contacts.

Contact	For	How to reach them
ICT Service Desk	Sign-in problems, VPN, and anything technical	IThelp@wits.ac.za · +27 11 717 1717 · 1st floor, South Westside, Solomon Mahlangu House
Human Resources	Contracts, personal details, and onboarding questions	The University switchboard, +27 11 717 1000
Remuneration, Pensions & Medical Aid	Payroll, retirement fund and medical aid queries	The University switchboard, +27 11 717 1000
Employee Relations	Workplace concerns, grievances and disputes	The University switchboard, +27 11 717 1000

The three HR contacts each have a **Find the right person** button, which opens the Human Resources pages on the Wits website in a new tab. Wits HR has no single email address, so the switchboard puts you through to the right person.

Send a question to HR

1. On Help & Support, select the **Contact Support** tab and scroll to **Ask HR for help**.
2. Under **What do you need help with?**, say what it is about in a few words.
3. Under **Details**, say what happened and what you have tried.
4. Select **Send to HR**.

A green note confirms it was sent. Your question goes to HR with your name, and appears on **Feedback & Surveys** › **Feedback to HR**, where you can follow it and read HR's reply.

GOOD TO KNOW

For a question about an HR policy, such as leave, use the Policy Guide under **Induction** › **Policies** (see Part 2). It answers in plain words and shows the part of the policy the answer comes from.

PART 2 · NEW AT WITS

Your first weeks

For staff who have just joined Wits. It takes you through the five onboarding steps, your documents and to-do list, the induction pages, and the University's policies.

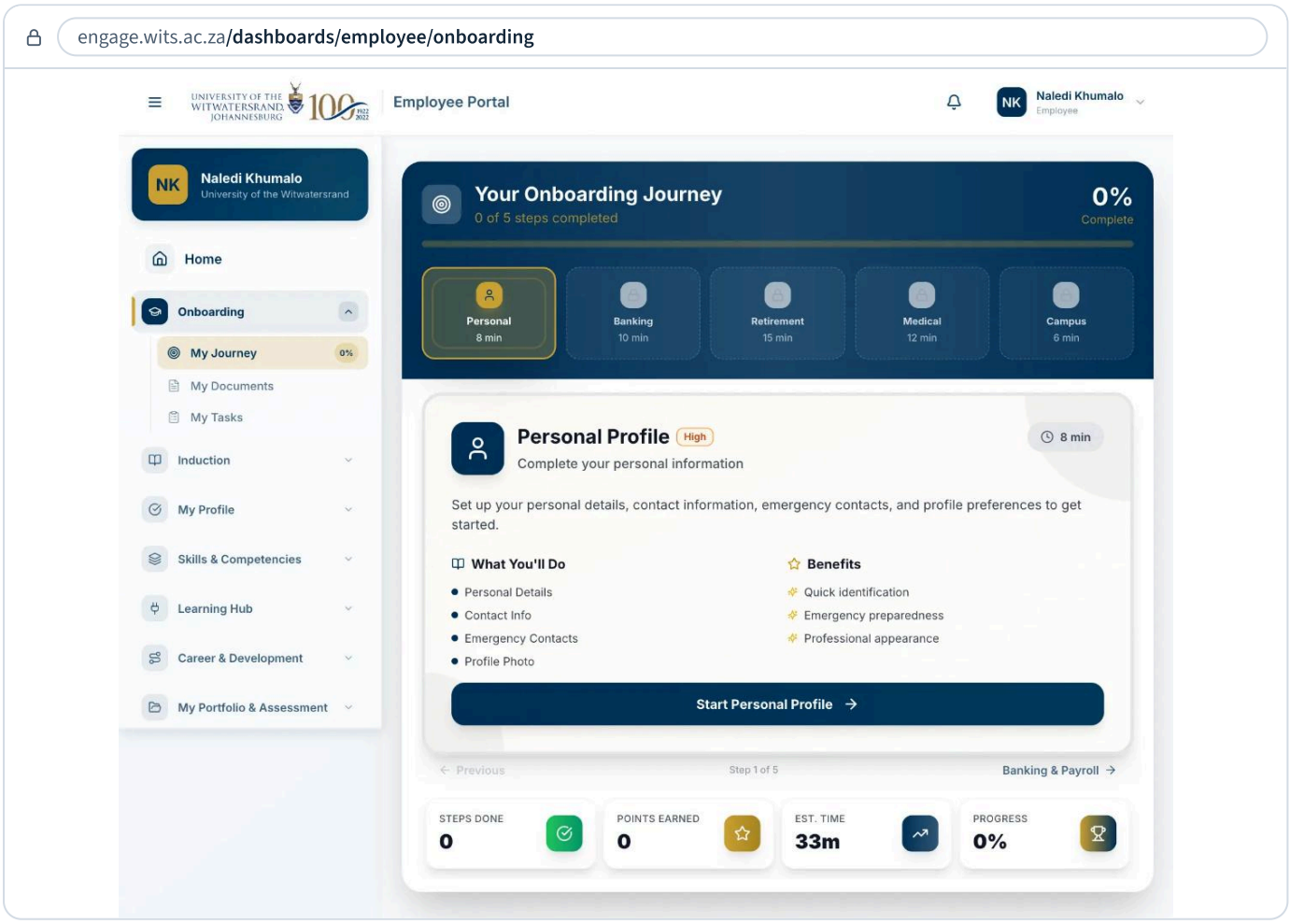
Onboarding

For new staff · **Onboarding** › **My Journey** in the menu

Onboarding collects the details the University needs to pay you, cover you and let you onto campus. It is five steps. Four are short question-and-answer conversations; the retirement fund step is a form.

Start your onboarding

1. On **Home**, select **Start onboarding** in the **Your onboarding** band. You can also open **Onboarding** › **My Journey**.
2. On **Your Onboarding Journey**, select **Start Personal Profile**.



Your journey on your first visit. Only Personal Profile is open; the padlocks on the other four lift once your personal details are saved.

The five steps are:

Step	What it covers	Who looks at it afterwards
Personal Profile	Your personal details, address, emergency contact and dependants.	Nobody has to approve it. HR can see it.
Banking & Payroll	The account your salary is paid into, and proof of that account.	The banking team approves or rejects the account.
Retirement Planning	Joining the retirement fund: your pensionable salary, death benefits, investment choice and four declarations.	The retirement fund team approves or rejects the application.
Medical Coverage	Your current medical aid, or a meeting with a benefits officer to choose one.	The medical aid team schedules your meeting and decides on your application.
Campus Access	Your staff access card, a parking permit and library access.	The campus access team approves or rejects the request.

When one of these teams decides, Engage sends you a notification under the bell at the top of the page. A rejection carries the team's reason.

Do the steps in the right order

- Personal Profile comes first. The other four steps fill themselves in from it, so they stay locked until your personal details are saved. If you select a locked step, Engage shows Complete your Personal Profile first and keeps it closed.
- After that, do the other four in any order. Select a step in the strip at the top of the journey, or use the arrows under the card, to bring its card forward. Then select its Start button, such as Start Banking & Payroll.
- When you finish Personal Profile, Banking & Payroll or Campus Access, a button names the next step, such as Continue to Banking & Payroll, and opens it. Back to my journey returns you to the journey instead. A finished card on the journey also offers the next step you have not done.

Stop and carry on later

Your answers are saved as you give them, so you do not have to finish a step in one sitting.

- To leave a step, select the back arrow at the top left. You return to your journey and nothing is lost.
- When you open the step again, choose Continue where I left off to carry on from your last answer. Start fresh (in Personal Profile, Start completely fresh) starts the conversation again; what you already saved stays saved.

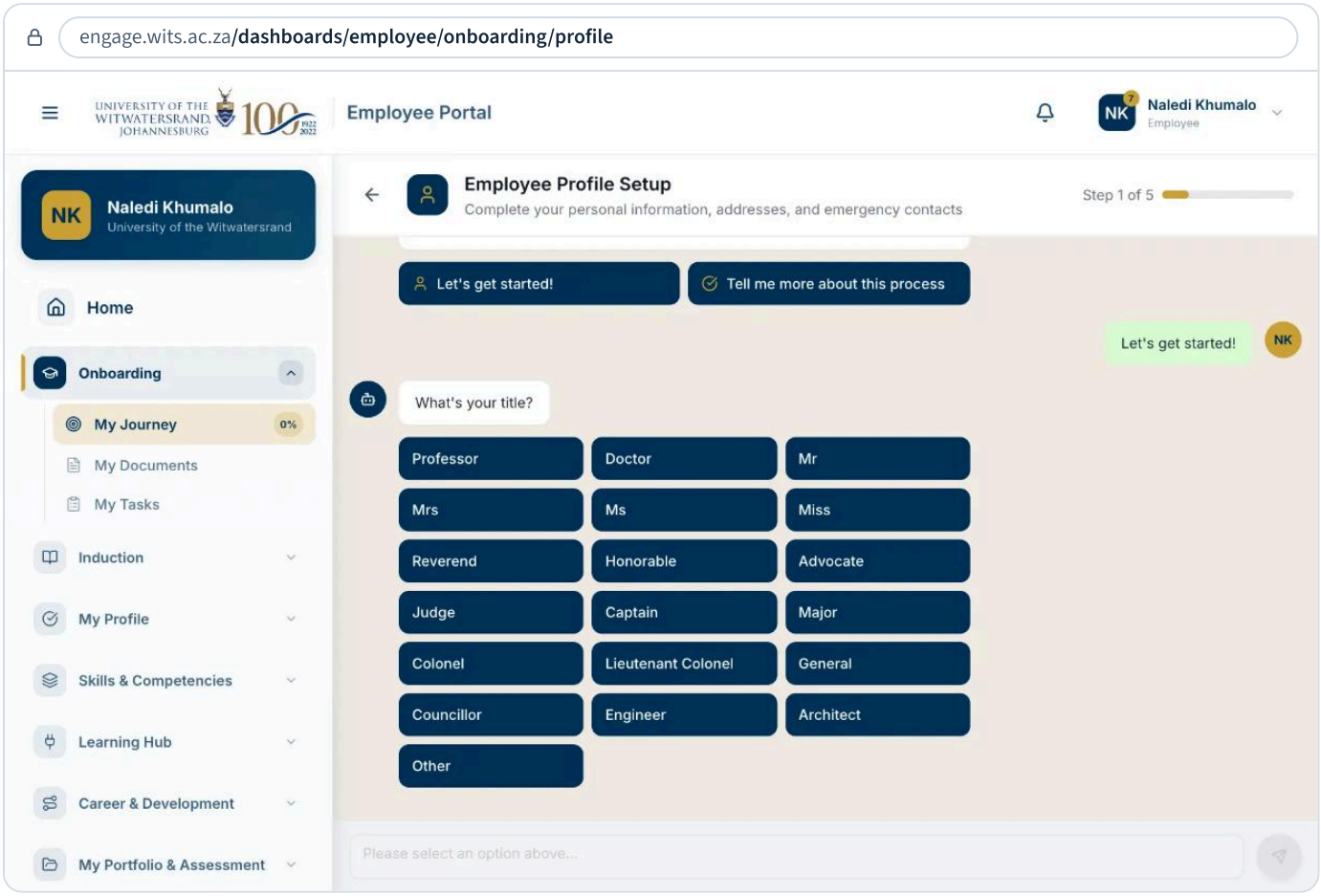
GOOD TO KNOW

Saving your answers is not the same as finishing. Personal Profile is done once you select Save & Complete, and Campus Access once you select Complete Access Setup. Until then the step stays open on your journey, ready for you to carry on.

Answer a step's questions

Each conversation asks one question at a time.

- Where there is a fixed set of answers, select one of the buttons under the question. The typing box then reads **Please select an option above...**.
- Otherwise, type your answer in the box at the bottom and press Enter, or select the send arrow beside it.
- Dates are chosen from a calendar that opens under the question.
- Where a question says it is optional, type **skip** to leave it blank.
- The **Step 1 of 5** counter at the top right shows where you are in that conversation.



A question with buttons. Select the answer that fits; the back arrow at the top left returns you to your journey.

Complete your personal profile

Have ready: your ID or passport number, your cell number, your next of kin's contact details, and your dependants' dates of birth.

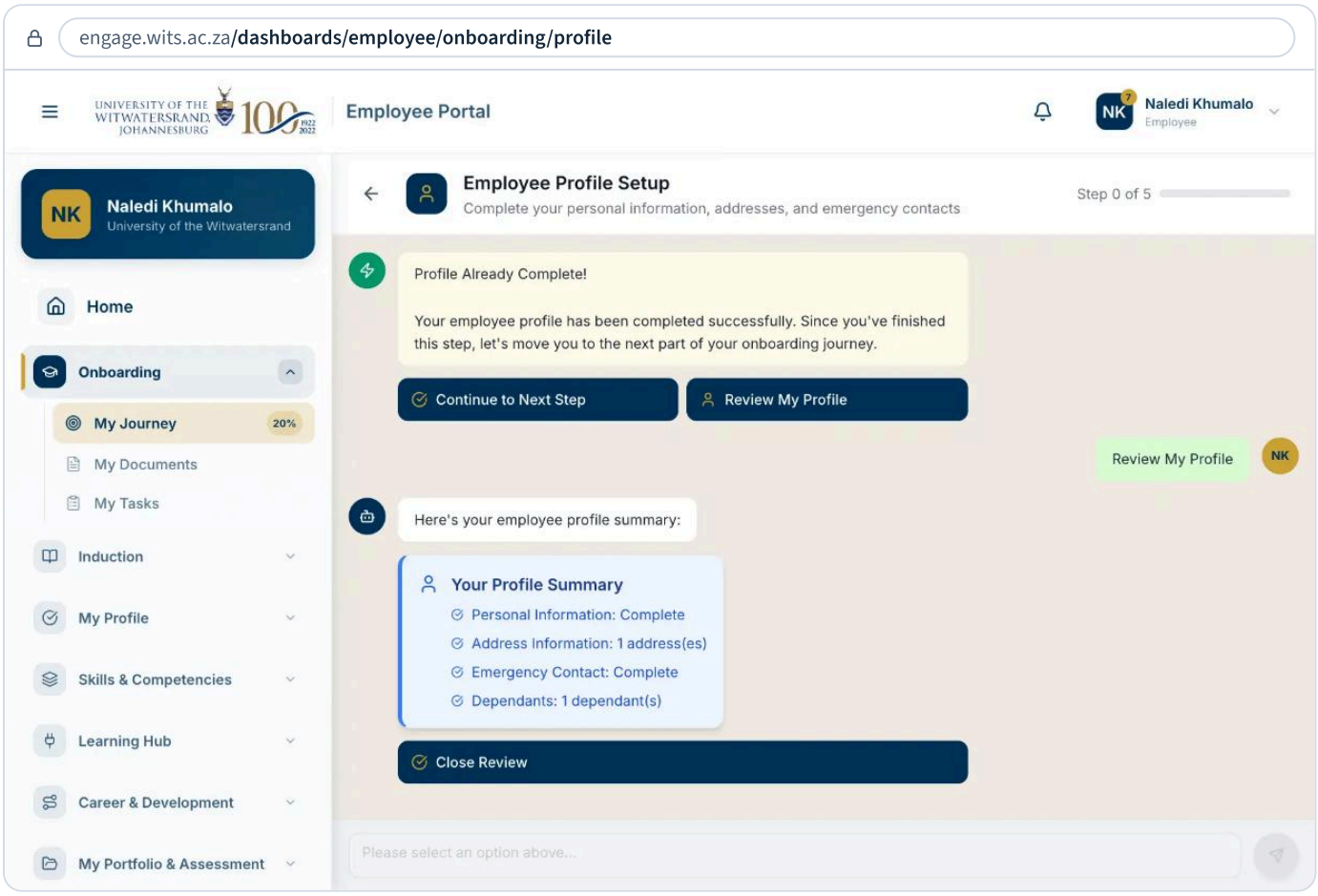
1. On your journey, select **Start Personal Profile**, then **Let's get started!**
2. Answer the **personal details** questions: title, preferred name, ID type (**South African ID**, **Passport**, **Asylum Document** or **Refugee Document**) and number, gender, race, disability, marital status, nationality, country and town of birth, home language, driving licence and its code, phone numbers, department and position. Questions Engage can already answer, such as your name, are skipped.
3. Select **Continue to Address** and give your street, suburb, city, province, country and postal code.
4. Select **Continue to Emergency Contact** and give your next of kin's relationship to you, name, title, home and business telephone numbers, and email address.

5. Select **Yes, add dependants** and give each dependant's first name, surname, birth date, gender and relationship to you (**Child**, **Stepchild**, **Adopted Child** or **Grandchild**). Select **Add another dependant** for the next one, or **I'm done with dependants**. If you have none, select **No dependants to add**.
6. Check the summary of everything you entered. Select **Edit Information** to redo a section, or **Save & Complete**.

The disability question is optional: answer **Yes**, **No** or **Prefer not to say**. Wits uses the answer in its skills development reports.

Engage checks a South African ID number when you send it. A valid one fills in your date of birth and gender for you. A phone number must be in the South African format, and an email address must contain an @.

After **Save & Complete**, a short celebration shows the points you earned. Then select **Continue to Banking & Payroll**, or **Back to my journey**. The step reads **✓ Done** on your journey.



A finished step, opened again. **Review My Profile** shows what was saved; **Continue to Next Step** takes you back to your journey.

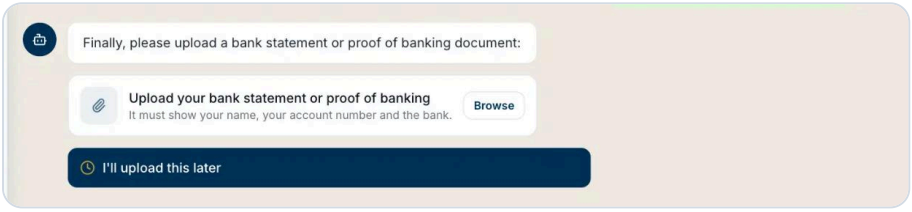
To change these details later, including your disability answer, use **My Profile › My Details**.

Give your banking details

Have ready: your bank, account number and account type, and a bank statement or bank letter as a PDF, JPG or PNG of up to 5 MB. It must show your name, your account number and the bank.

1. On your journey, select **Start Banking & Payroll**.

2. Choose **South African Bank Account** or **International Bank Account**.
3. Select your bank from the list. If it is not listed, select **Other** and type its name. For an international account, type the bank's name.
4. Type your account number.
5. Say whose name the account is in: select your own name, or **A different name** and type the name exactly as the bank holds it.
6. For a listed South African bank, Engage fills in the bank's branch code for you. Otherwise it asks you to type the branch code, or for an international account the SWIFT code.
7. Choose the account type, such as **Current Account** or **Savings Account**.
8. Check **Please Verify Your Banking Details**. Select **Details are correct - Upload proof**, or **I need to edit something** to change the bank, account number, account holder, branch details or account type.
9. Select **Browse** and choose your proof of banking.



The proof-of-banking question. The step is only finished once a document is uploaded here.

Once the document is uploaded, the step reads **✓ Done** on your journey. The banking team then checks the account against your proof and approves or rejects it, and you get a notification either way.

GOOD TO KNOW

If the document is not to hand, select **I'll upload this later**. Your account details are saved and Engage moves you to the next step, but Banking & Payroll stays unfinished. To finish it, upload the document under **Onboarding › My Documents** with the category **Banking**.

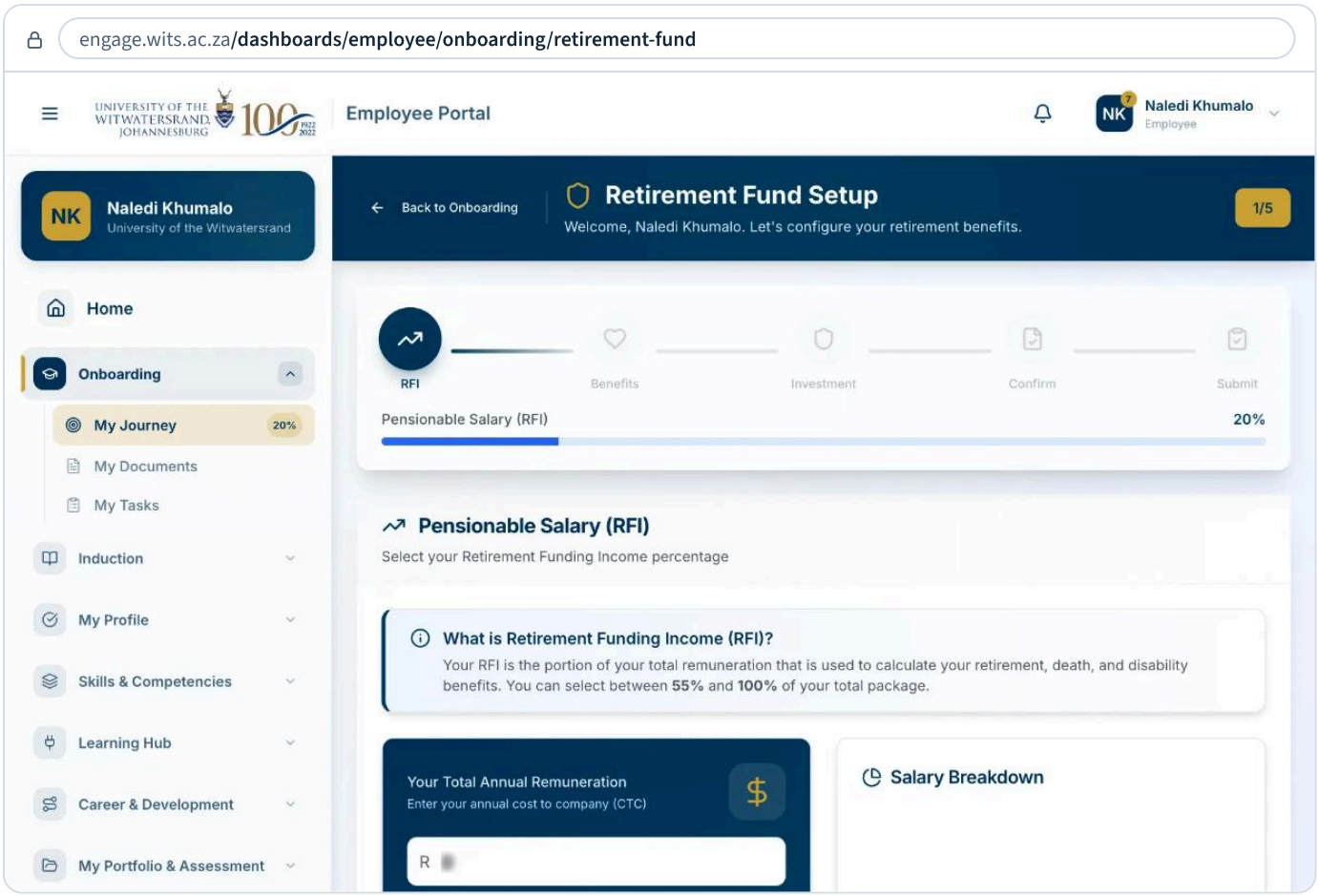
Join the retirement fund

Have ready: your total annual remuneration (your cost to company), and the ID numbers of a spouse or children you want a pension paid to.

1. On your journey, select **Start Retirement Planning**, then **Open Retirement Setup**. **Retirement Fund Setup** opens after a short wait while it shows **Loading retirement setup...**.
2. **RFI.** Type your annual cost to company, then set your RFI percentage, between 55% and 100%. Engage works out your pensionable salary from the two. Select **Continue to Death Benefits**.
3. **Benefits.** The death benefit lump sum is always included. Turn on **Spouse Pension** to add a spouse or life partner, with their ID number, name, phone number and date of birth. Turn on **Children Pension** to add up to two children, with their names and ID numbers. Select **Continue to Investment**.
4. **Investment.** Choose a profile: Growth, Conservative, Capital Protection or Shariah. Growth is used if you do not choose. Select **Continue to Acknowledgements**.

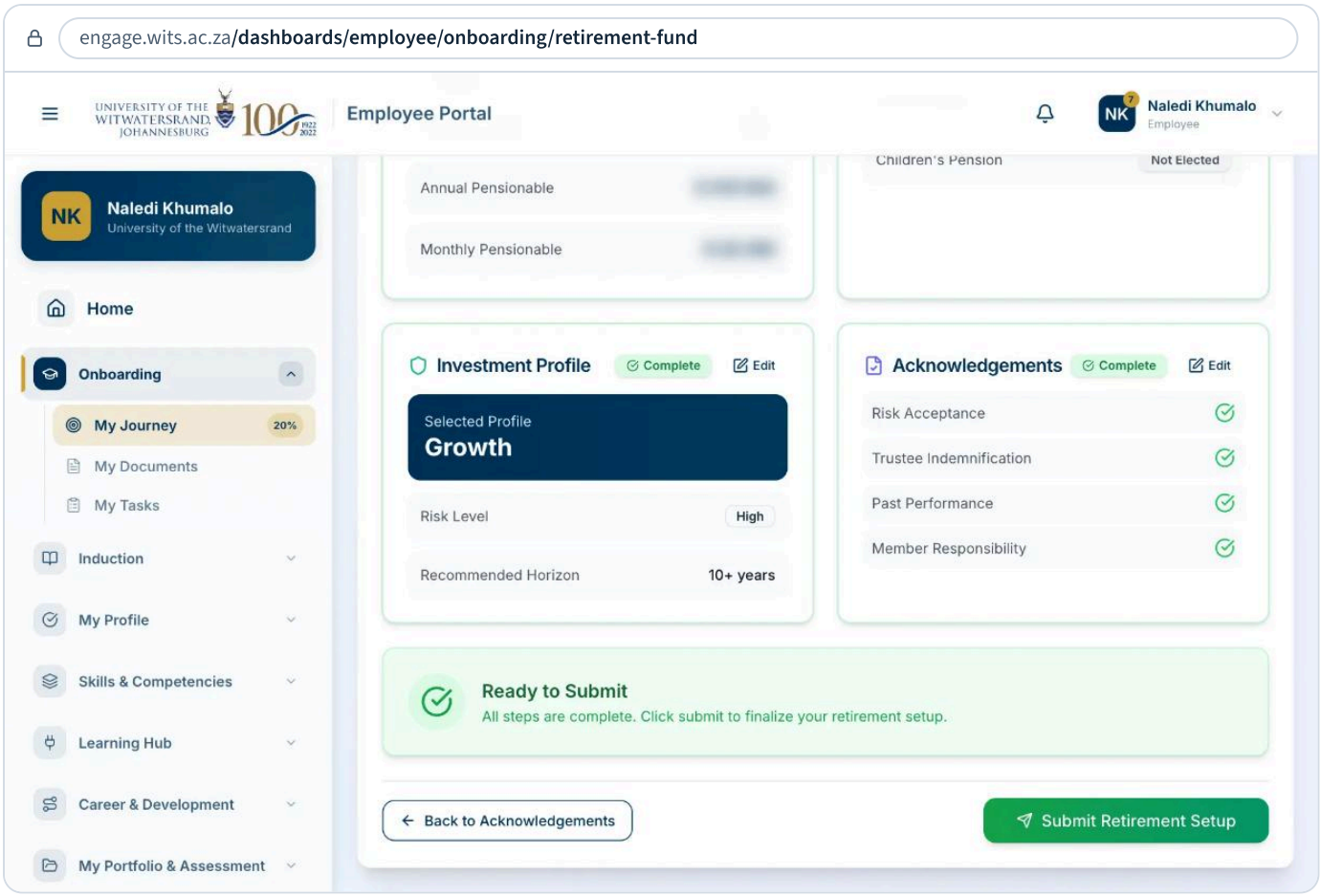
5 **Confirm.** Read each of the four statements (`Read full disclosure` opens the full wording) and select each card to tick it. Select `Continue to Summary`.

6 **Submit.** Check the summary. Each section has `Edit` to go back to it. Select `Submit Retirement Setup`.



The first of five steps. `Back to Onboarding` at the top left leaves without losing what you saved.

Every step has `Save Progress`, and each `Continue` button saves before it moves on, so you can leave and come back. A tick on the step bar marks each step you have saved.



The summary. **Submit Retirement Setup** only becomes available once every step is saved and all four statements are ticked.

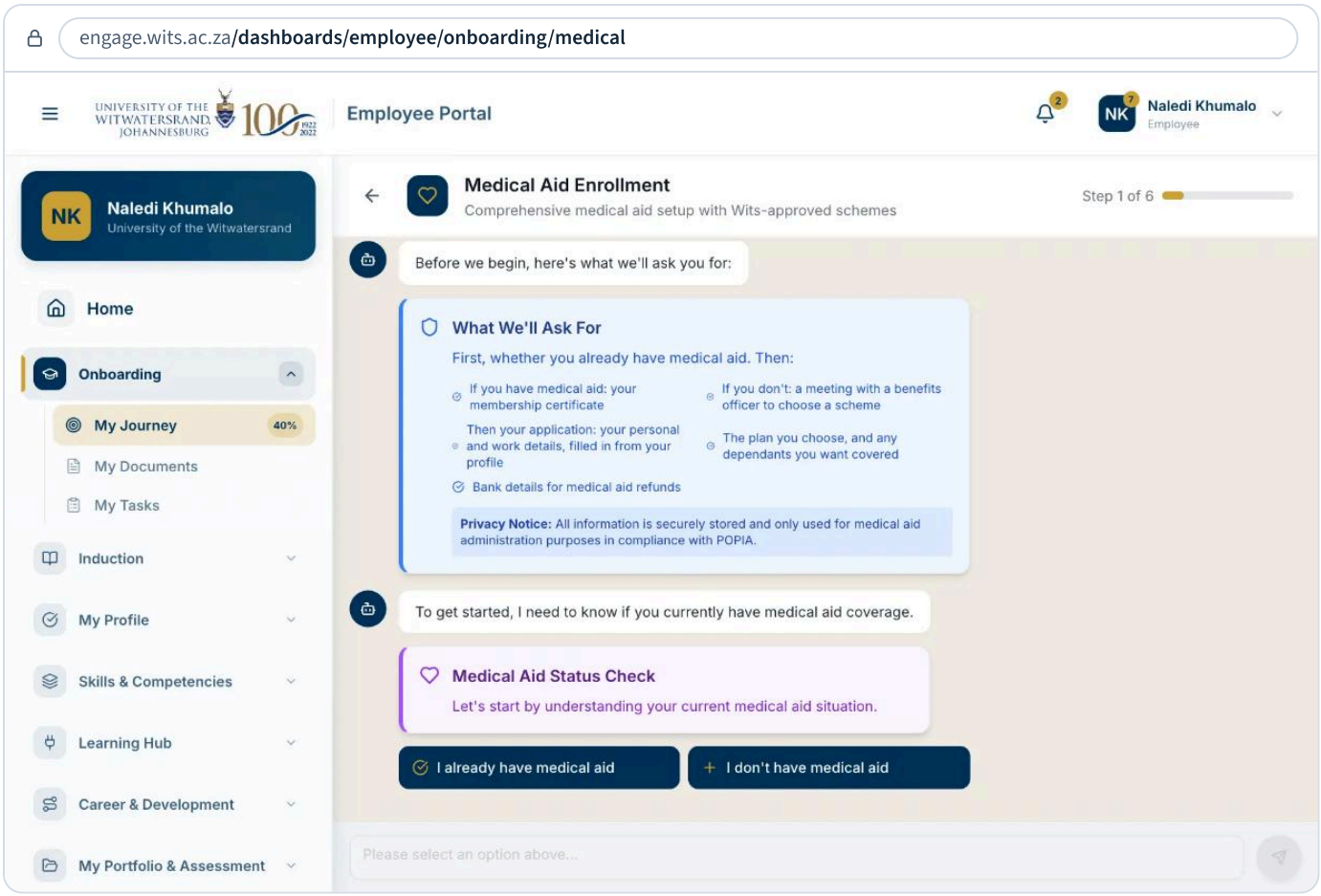
After you submit, Engage shows **Retirement Setup Complete!** and returns you to your journey. The step reads **⏳ Submitted** until the retirement fund team approves it, then **✓ Done**. It counts in your steps, and its points are added, once it is approved. You get a notification when they decide.

TAKE CARE

Your investment choice affects the benefit you will receive. If you are unsure which profile or RFI percentage to choose, speak to HR before you submit.

Set up your medical aid

1. On your journey, select **Start Medical Coverage**.
2. Answer the first question: **I already have medical aid** or **I don't have medical aid**.



The question that decides the rest of this step.

If you already have medical aid, upload your current membership certificate as a PDF, JPEG or PNG of up to 5 MB. That finishes the step on your side. It reads **Submitted** until the medical aid team approves it, and counts, with its points, once they do.

If you do not have medical aid, you choose your cover with a benefits officer:

1. Select **Request Appointment**. The medical aid team picks a date and you get a notification. Your journey card reads **Appt Requested**, then **Appt Scheduled**.
2. Meet the benefits officer. When they mark the meeting as done, select **Continue Medical Setup** on the Medical Coverage card of your journey.
3. Select **Apply Online (Choose Provider)** and choose a Wits-approved provider, or **Upload Certificate (Done Offline)** if you applied directly with the scheme.
4. If you apply online, choose **New Application**, **Reinstatement**, **Continuation** or **Change**, work through the form with **Next**, and select **Submit** on the last page.

To finish the form later, select **Save Draft** beside **Next** (on a phone, the save icon). When you come back, the conversation offers **Continue my saved application**, and the form opens with your answers filled in. Check each section before you submit; **Start again** clears them.

An application reads **Submitted**, then **Under Review**, on your journey card. The step is done, and its points are added, once the medical aid team approves your application or your certificate. You get a notification when the team decides, and when your meeting is booked.

Request campus access and parking

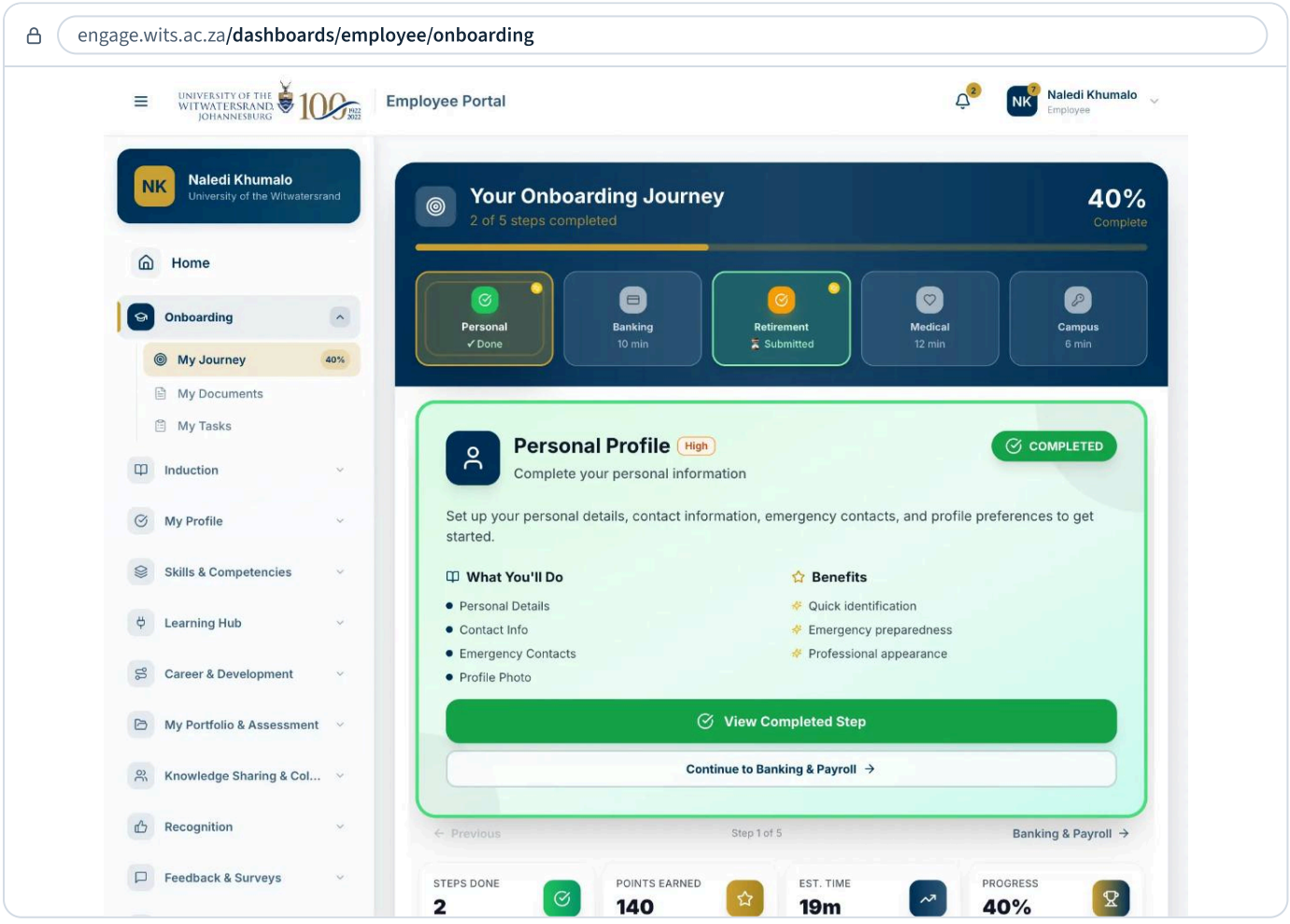
Have ready: your staff card number if you already have a card, or a clear photo of yourself (JPEG, PNG or WebP, up to 5 MB) if you need one; and, for parking, your vehicle's registration, make, model and colour.

1. On your journey, select **Start Campus Access**, then **Start Access Setup**.
2. Select **Yes, I have an access card** and type its number, or **No, I need a new access card** and upload a photo for it. You cannot go on without the photo.
3. For **Do you need a parking permit for campus?**, select **Yes, I need parking** or **No parking needed**. For a permit, type your vehicle's registration, make, model and colour, then select a zone: **Zone A - Central Campus**, **Zone B - East Campus** or **Zone C - West Campus**.
4. Select **Yes, add library access** or **No, not for now**.
5. Check the summary of your card, parking and library requests, and select **Complete Access Setup**.

The step reads **✓Done** on your journey. The campus access team then approves or rejects your request, and you get a notification either way.

Check where your onboarding stands

Open **Onboarding › My Journey**. The percentage beside **My Journey** in the menu is the same figure.



Part-way through. Banking still needs its proof document; Retirement is waiting for the retirement fund team.

In the strip	On the card	What it means
A time, such as **10 min**	The same time, and **Start …**	Not started yet. The time is a rough guide.
A padlock	**Complete your profile first**	Locked until your personal details are saved.
A percentage, such as **40% done**	—	Personal Profile only: you are part-way through it.
Ready to finish	—	Personal Profile only: every section is saved. Open it and select **Save & Complete**.
⏳ **Submitted**	**SUBMITTED**	You have done your part. The medical aid or retirement fund team still has to approve it. It is not counted in **Steps Done** yet, and its points are added, once they approve.
✓ Done	**COMPLETED**, with **View Completed Step**	Finished.

Under the cards, **Steps Done** counts finished steps, **Points Earned** is your points total from everything you do in Engage, **Est. Time** is a rough guide to the time left, and **Progress** is the overall percentage.

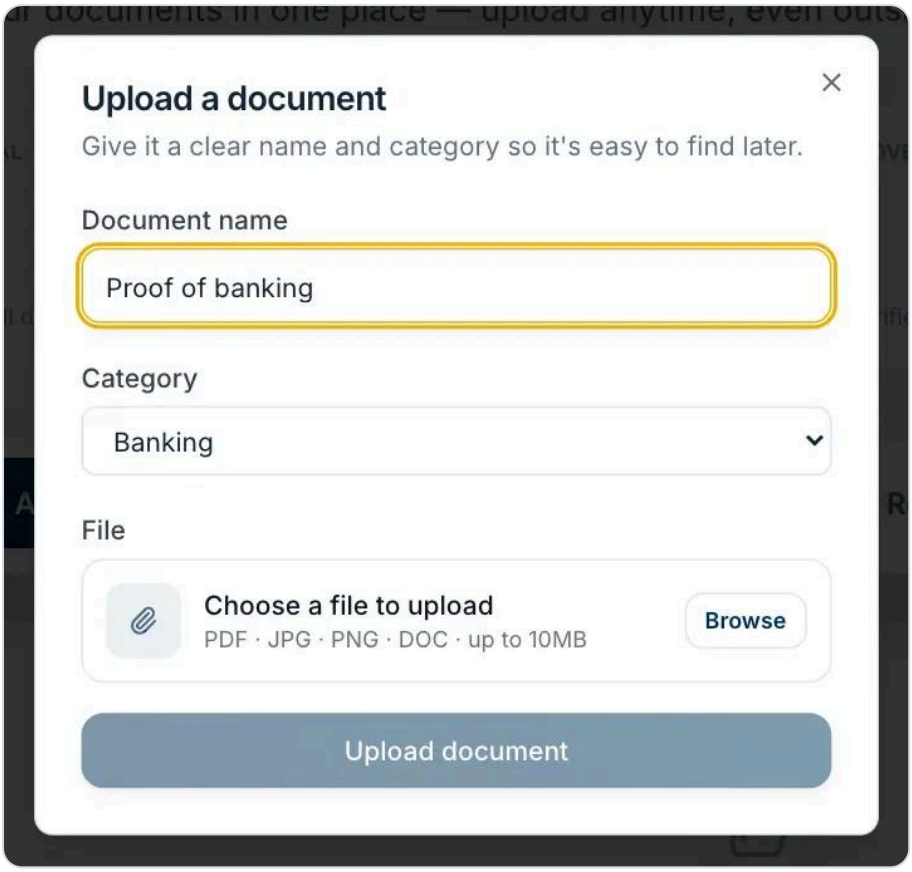
My Documents

For all staff · **Onboarding** › **My Documents** in the menu

Every document you upload, in one place. You can upload here at any time, during onboarding or long after it.

Upload a document

1. Open **Onboarding** › **My Documents** and select **Upload Document**.
2. Type a **Document name** you will recognise later, such as "ID document". If you leave it blank, the file's own name is used.
3. Choose a **Category**: **Personal**, **Medical Aid**, **Retirement**, **Banking** or **Other**.
4. Under **File**, select **Browse** or drop the file on the box. PDF, JPG, PNG and Word documents of up to 10 MB are accepted.
5. Select **Upload document**.



The upload form before a file is chosen. **Upload document** becomes available once you choose a file.

The document appears in the list as **Waiting for review**, and the **Pending** count goes up by one. A proof of banking uploaded with the category **Banking** also finishes the Banking & Payroll onboarding step.

Replace a document

Use this when a document was rejected, or you have a newer copy.

1. On the document you want to replace, select the upload arrow (**Replace**), between the download arrow and the bin.
2. In **Replace a document**, choose the new file. It keeps the old document's category.
3. Select **Replace document**.

The new file goes for review again, and the old one leaves your list.

The other buttons on each document preview it on the page and download a copy. While a document is still waiting for review, the bin deletes it. Once it has been approved or rejected it has no bin: it is kept as the record of that decision, and you replace it instead.

TAKE CARE

Deleting cannot be undone. It removes the file and its entry for good, so download a copy first if you still need it.

See whether a document was accepted

The four figures at the top count your documents: **Total**, **Pending** (awaiting review), **Approved** and **Rejected** (needs uploading again). Each document also shows its own status.

- Proof of banking is reviewed by the banking team, medical aid certificates by the medical aid team, and access-card photos by the campus access team.
- Documents filed under **Personal** or **Other** are reviewed by HR.
- When a reviewer approves or rejects a document, you get a notification that names it. A rejected document shows the reviewer's reason under its name, and the notification gives it too. Use **Replace** to send a corrected copy.

My Tasks

For all staff · **Onboarding** › **My Tasks** in the menu

A private to-do list that you keep for yourself. Nobody else sees it and nobody adds tasks to it. Work sent to you, such as surveys and training, has its own pages.

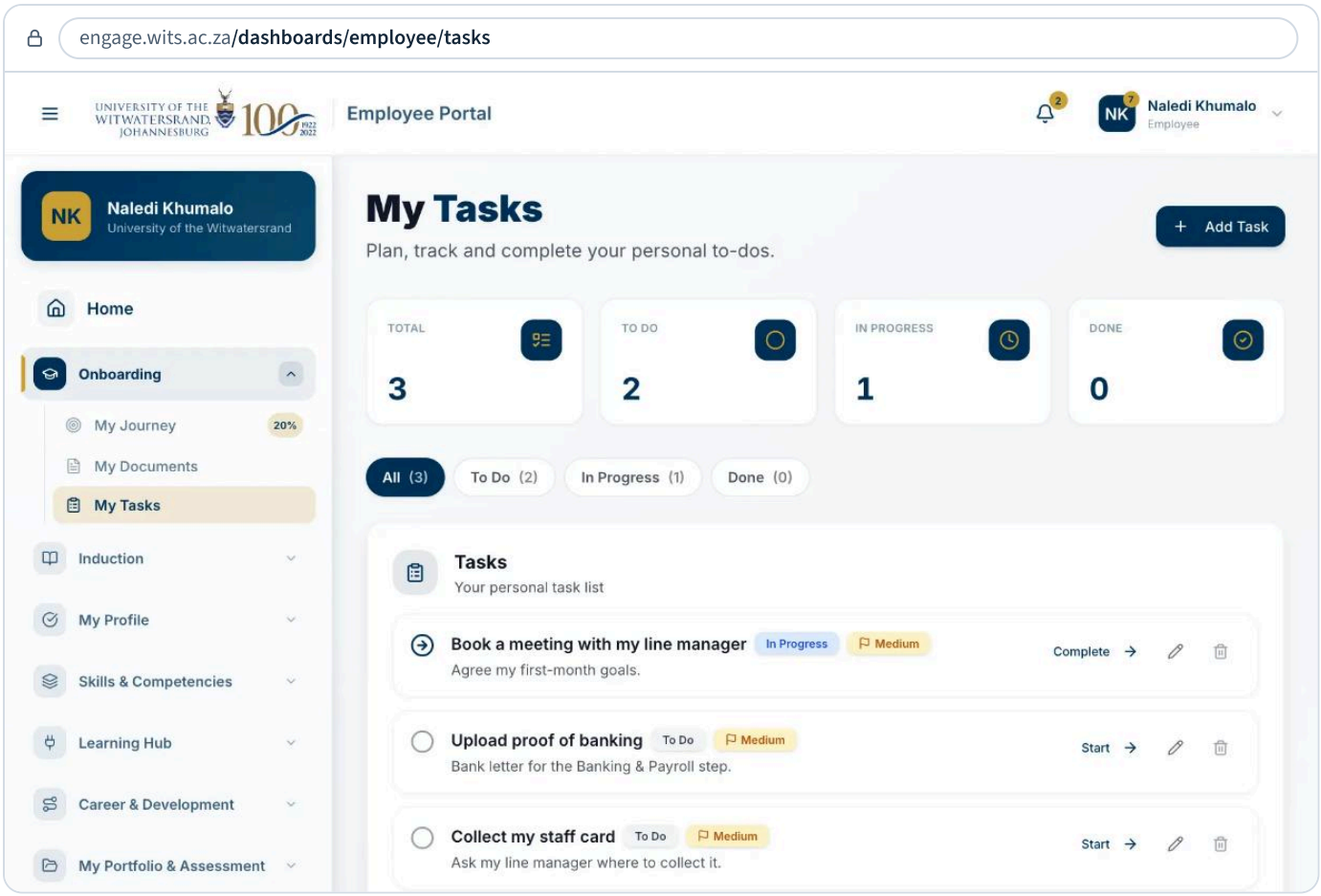
Add a task

1. Open **Onboarding** › **My Tasks** and select **Add Task**.
2. Type a **Title**. You can also add a **Description**, a **Priority** (low, medium or high) and a **Due date**.
3. Select **Add Task**.

The task appears at the top of the list as **To Do**.

Move a task along and finish it

- Select **Start** on a task to mark it **In Progress**.
- Select **Complete** to mark it **Done**. A done task is struck through and stays in the list.
- The circle at the left of a task does the same as the button: each press moves it one stage on.
- Use **All**, **To Do**, **In Progress** and **Done** above the list to show one stage at a time.



Your own list. **Start** and **Complete** move a task on; the pencil edits it and the bin deletes it.

A task with a due date shows it under the title. Once the date has passed, it reads **Overdue**.

Change or delete a task

- Select the pencil to change the task's details or set its status, then select **Save Changes**.
- Select the bin, then **Delete**, to remove it. This cannot be undone.

GOOD TO KNOW

Pressing the circle on a done task sends it back to **To Do**. To set any status directly, use the pencil.

Induction

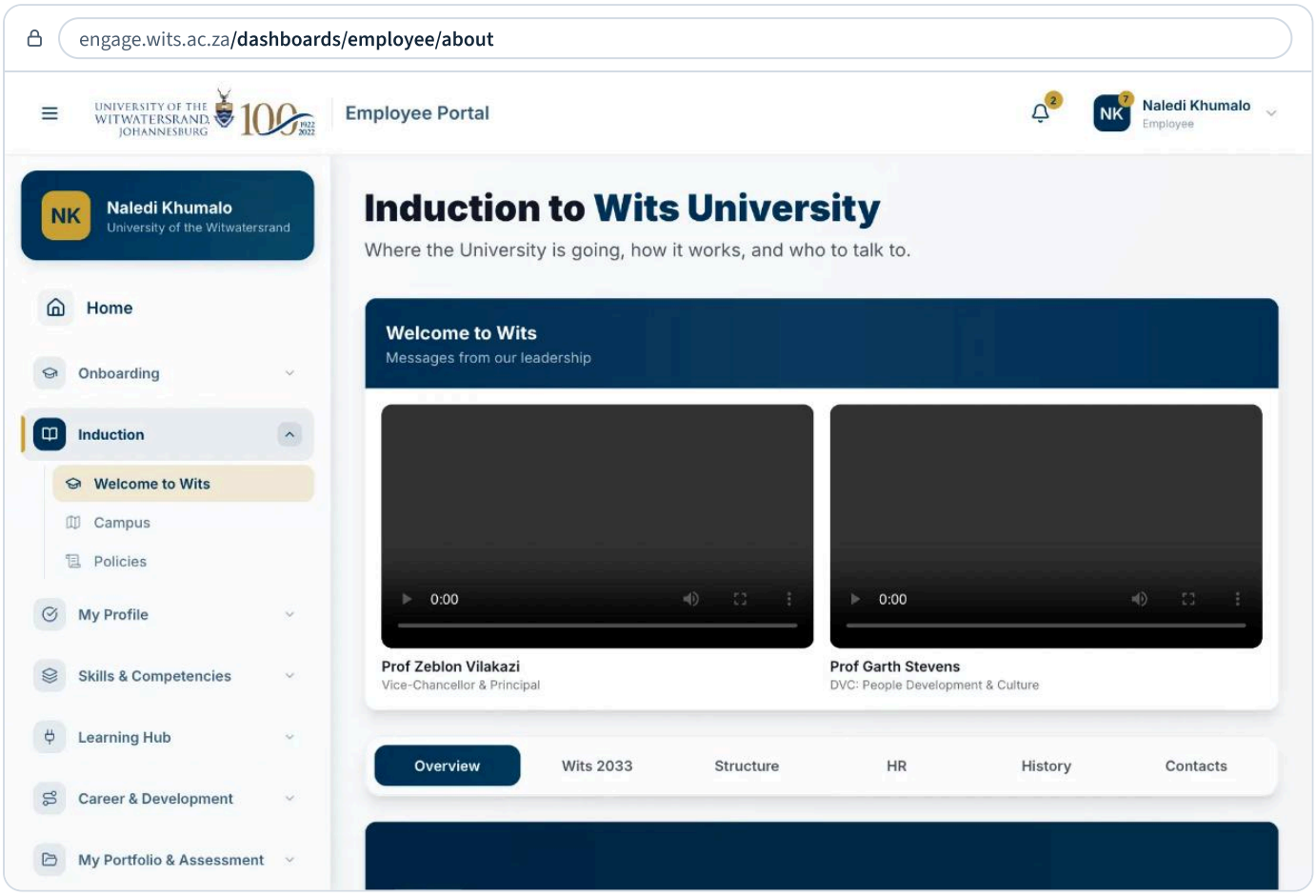
For new staff · **Induction** in the menu

Your introduction to the University: a welcome from its leadership, how Wits is organised, who to ask, and where everything is on campus.

Work through Welcome to Wits

1. Open **Induction › Welcome to Wits**.

2. Play both welcome videos at the top: one from the Vice-Chancellor and Principal, and one from the Deputy Vice-Chancellor for People Development and Culture.
3. Open each of the six tabs under the videos in turn.



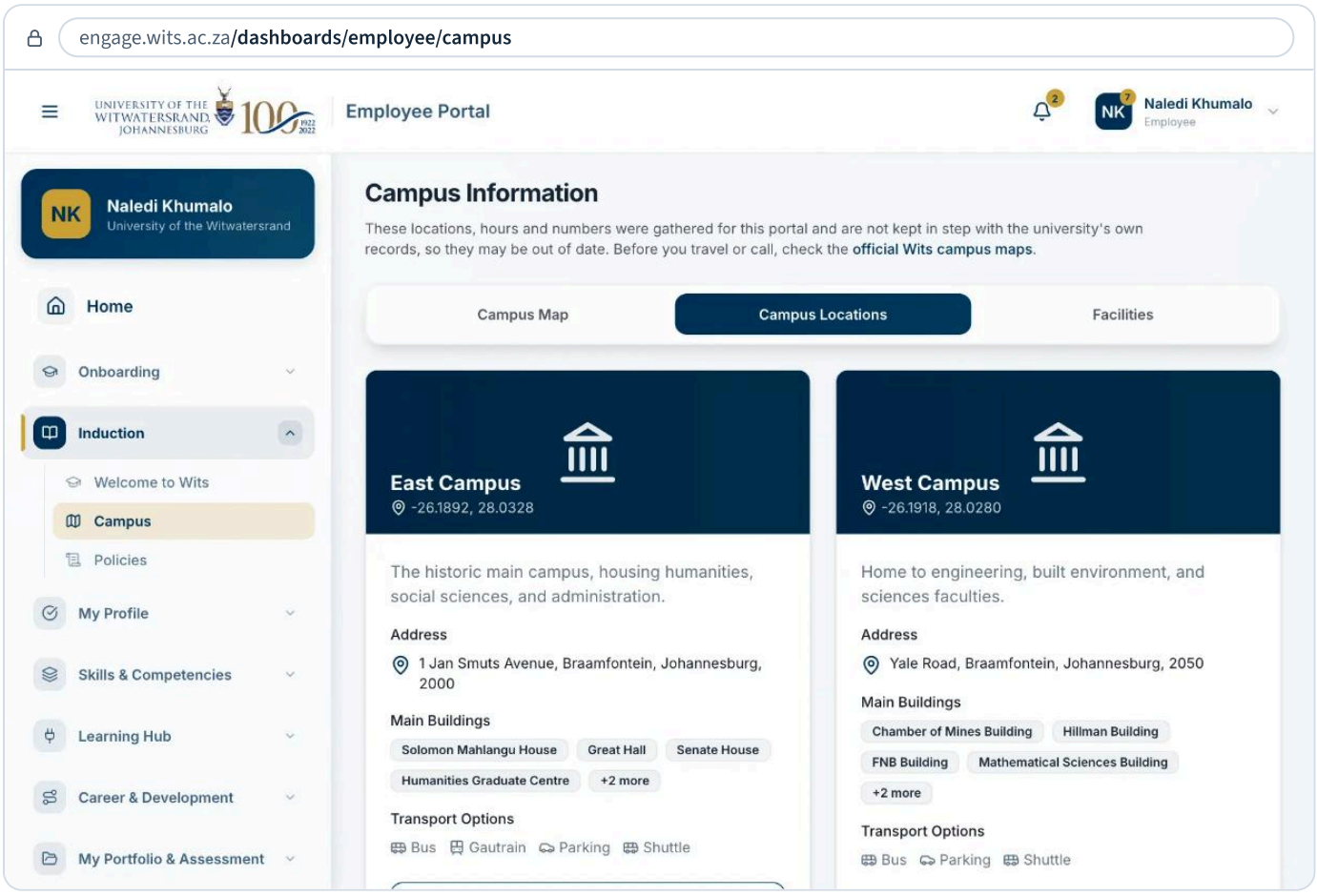
The two leadership videos and the six tabs. Playing both videos and opening every tab completes your induction.

Tab	What it covers
Overview	The University's vision and mission, with shortcuts to the other tabs and a **Campus & facilities** button.
Wits 2033	The University's strategic framework and its four pillars, with links to the full framework on the Wits website.
Structure	How Wits is governed, from Council and Senate to the five faculties and the support divisions. Your own area's chart is with your line manager.
HR	How HR works at Wits and who to ask first, the central HR units, links to the Policy Guide and to feedback for HR, and a count of policies in each category.
History	Key dates from 1896 to the centenary in 2022.
Contacts	The ICT Service Desk's own number and email address, and the University switchboard (+27 11 717 1000) for every other office: HR, finance, Campus Protection Services, the Campus Health & Wellness Centre and Facilities Management. **View Complete Contact Directory** opens the Help page.

Engage records each tab as you open it and each video as it starts. Once both videos and all six tabs are done, you earn points for completing your induction. Opening a tab again records nothing new.

Find your way around campus

1. Open **Induction** › **Campus**.
2. Choose a tab:
   - **Campus Map**: select **Open Interactive Map** to open the University's own campus map on the Wits website, in a new tab. Under it, the **Find Important Locations** buttons (**Libraries**, **Places to eat**, **Parking** and **Health services**) open **Facilities** showing only that kind of place.
   - **Campus Locations**: the five campuses (East, West, Education, Medical and Wits Business School), each with its address, main buildings and transport. **Open in Maps** finds the campus in Google Maps.
   - **Facilities**: libraries, places to eat, parking and the campus health centre, with opening hours. The buttons at the top (**All facilities**, **Library**, **Food**, **Parking**, **Health**) show one kind at a time. **Directions** finds the place in Google Maps.



The Campus Locations tab. Read the note at the top: confirm hours and numbers before you rely on them.

GOOD TO KNOW

The locations, hours and telephone numbers on this page are not kept in step with the University's own records. Before you travel or call, check the **official Wits campus maps** linked at the top.

Policies

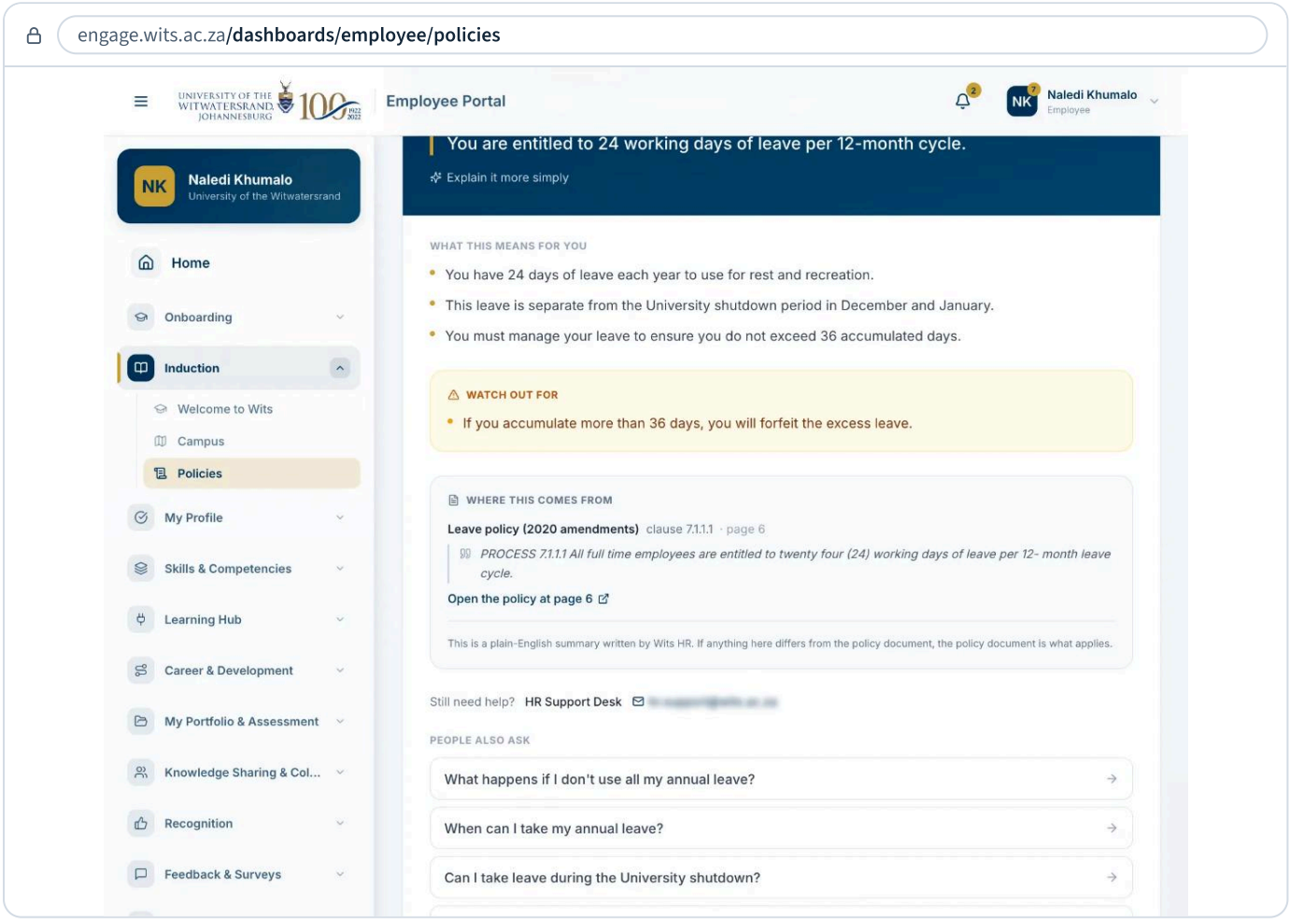
For all staff · **Induction** › **Policies** in the menu

Plain-English answers to HR questions, and the University's policy documents behind them. The page opens on the **Policy Guide**; **All documents** holds the policies themselves.

Ask the Policy Guide a question

1. Open **Induction** › **Policies**.
2. Type your question in your own words, for example "how many days of annual leave do I get", and select **Ask**.
3. Select the question in the list of answers that matches yours.

The answer gives the short answer first, then **What this means for you**, anything to **Watch out for**, and **Where this comes from**: the policy, the clause and page, and the exact wording quoted from it.



An answer with its source. **Open the policy at page 6** opens the document at the quoted clause.

- If you do not know what to ask, choose one of the **Most asked right now** questions, or work down through the subjects further down the page.
- Select **Tell us your role for answers that match your contract** so the answers fit your kind of appointment.
- **Explain it more simply** shows a simpler version of the answer, and **People also ask** lists related questions.
- If the guide has no answer, it says so rather than guessing. **Still need help?** under each answer shows who to contact.

GOOD TO KNOW

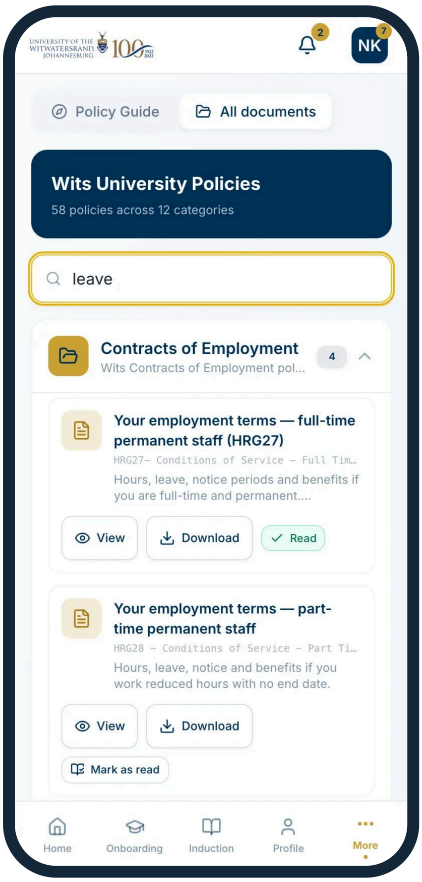
The answers are plain-English summaries written by Wits HR. Where a summary and the policy document differ, the policy document applies.

Open a policy document

1. Select **All documents** at the top of the page.
2. Type in **Search policies by name or description...** to narrow the list, or open a category. **Expand All** and **Collapse All** open and close every category.
3. On the policy you want, select **View** to open it in a new tab, or **Download** to keep a copy.

Mark a policy as read

1. Read the policy.
2. On its card under **All documents**, select **Mark as read**.



A policy already marked as read (green **Read**) above one that is not yet.

The button turns into a green **Read** badge, Engage records that you read that version of the policy, and you earn points. HR relies on this record, so only select it once you have read the policy. If the policy is revised later, the new version shows **Mark as read** again.

PART 3 · EVERY STAFF MEMBER

Learning and growing

For every member of staff. Find and open courses, book training, see your skills, agree a development plan with your manager, apply for a bursary, and share what you know.

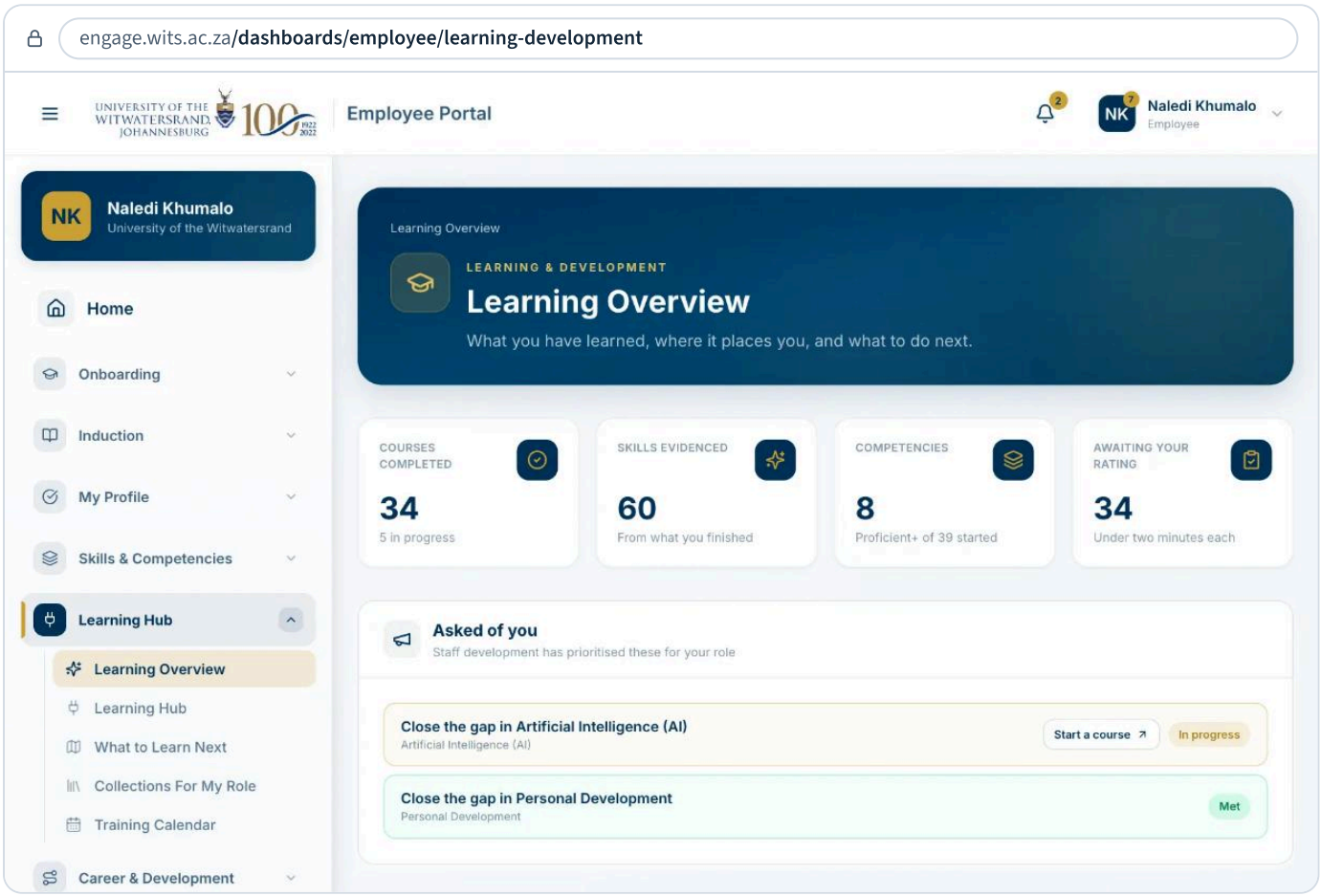
Courses and training

For all staff · **Learning Hub** in the menu

Wits staff take online courses in LinkedIn Learning, a library of video courses that Wits pays for. Engage shows what you have taken and finished there, suggests what to take next, and lists the training sessions HRDU (the Human Resources Development Unit) runs.

See a summary of your learning

Open **Learning Hub** › **Learning Overview**.

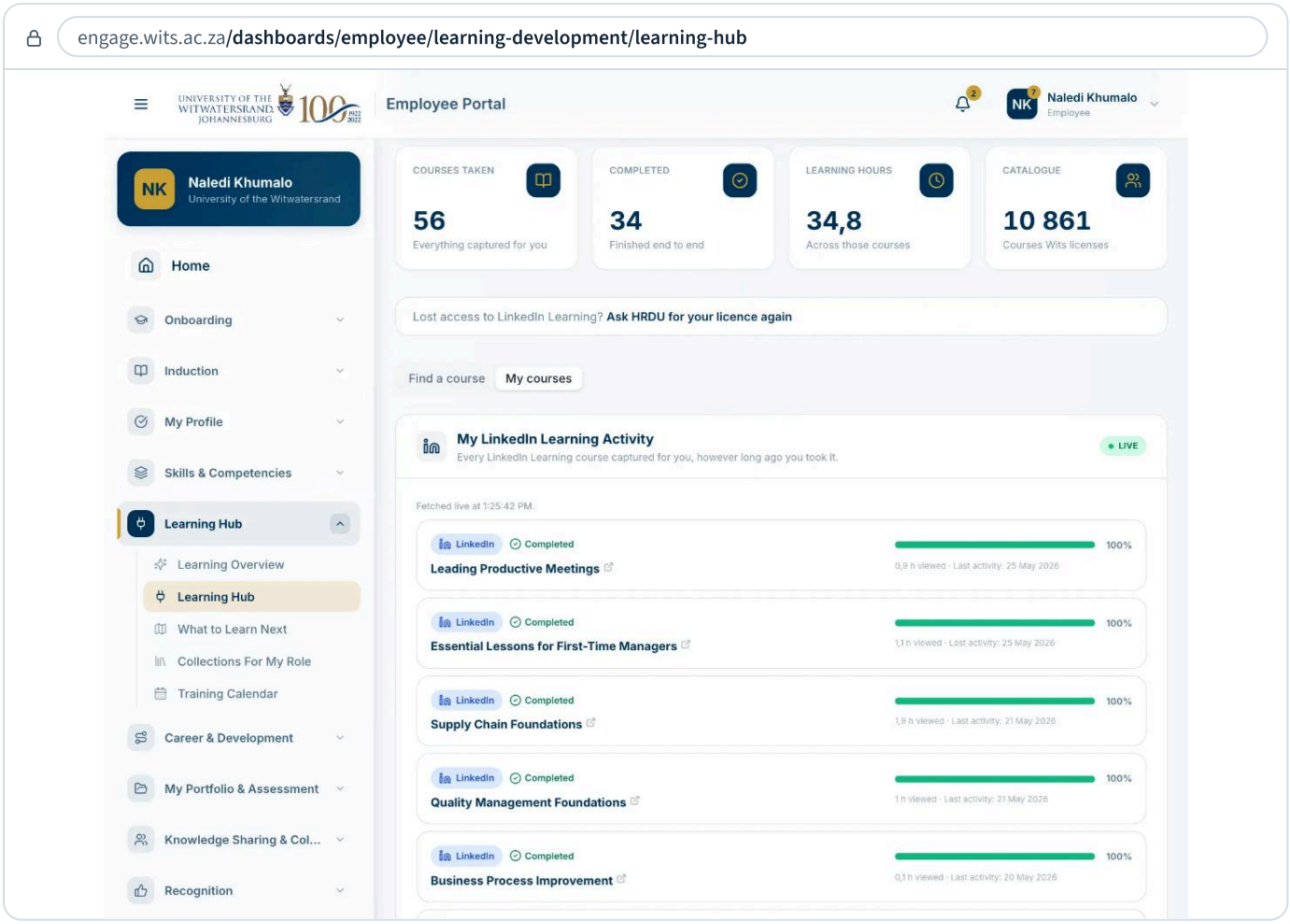


The four figures sum up your learning. Under **Asked of you**, a skill not yet met has a **Start a course** button.

- **Asked of you** lists skills staff development wants people in your role to build, marked **In progress** or **Met**. **Start a course** opens a course that teaches the skill in LinkedIn Learning.
- **Where your learning places you** lists your strongest competencies.
- **Where to go next** links to the pages you are most likely to want.

See what you have learnt

1. Open **Learning Hub** › **Learning Hub**.
2. Select the **My courses** tab.



Each course shows whether you finished it, how far you got, your hours and when you last worked on it.

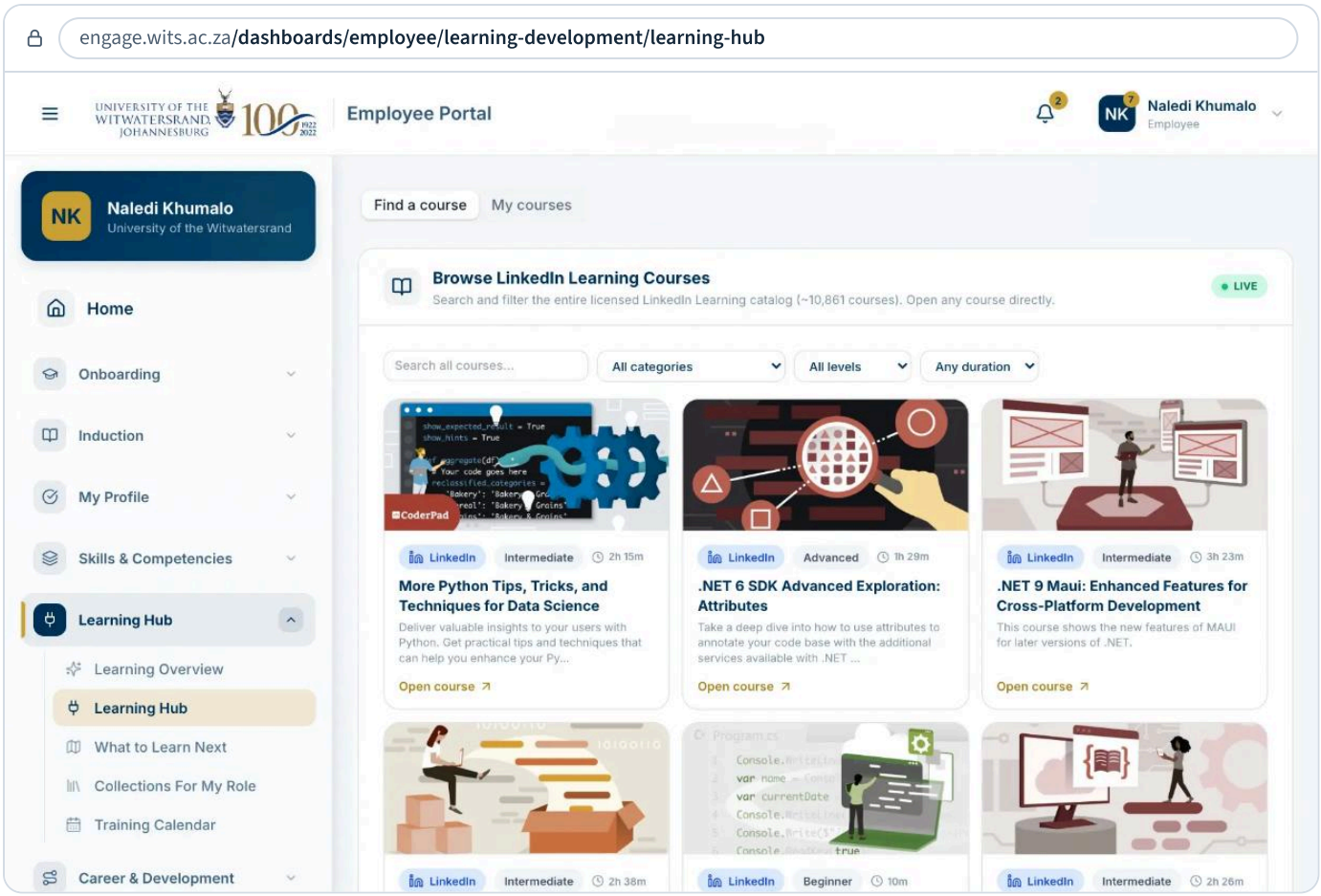
Every LinkedIn Learning course you have opened is listed, marked **Completed**, **In Progress** or **Not Started**. Select a course's name to find it in LinkedIn Learning, in a new tab.

GOOD TO KNOW

Your LinkedIn Learning activity reaches Engage overnight, so a course you start or finish today shows here the next day. A completed course can show zero hours: LinkedIn records viewing time and completion separately.

Find a course and open it

1. Open **Learning Hub** › **Learning Hub**. The **Find a course** tab opens first.
2. Type in **Search all courses...**, or narrow the list with **All categories**, **All levels** and **Any duration**.
3. Select a course. It opens in LinkedIn Learning in a new tab.



The whole card is the link. Each shows the course's level and length, and ends with **Open course**.

You need a LinkedIn Learning licence to watch a course. Without one, LinkedIn asks you to sign in and goes no further.

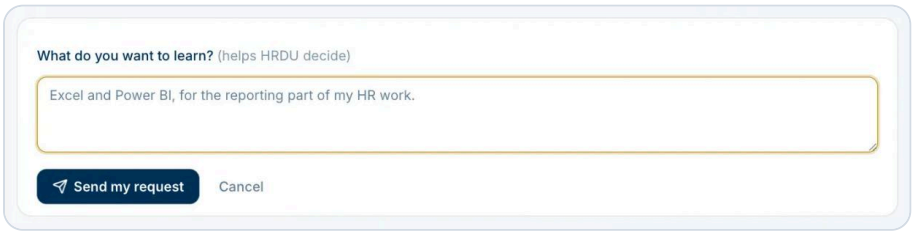
Ask for a LinkedIn Learning licence

What you see on the Learning Hub depends on whether Engage has any LinkedIn Learning activity for you.

- **No activity yet:** a card says **You need a LinkedIn Learning licence to open these courses.** Select **Request a licence**.
- **Already learning:** one line says **Lost access to LinkedIn Learning?** Select **Ask HRDU for your licence again** if your licence has been taken back.

Then:

1. Under **What do you want to learn?**, say in a sentence what you plan to study. It helps HRDU decide.
2. Select **Send my request**, or **Cancel**.



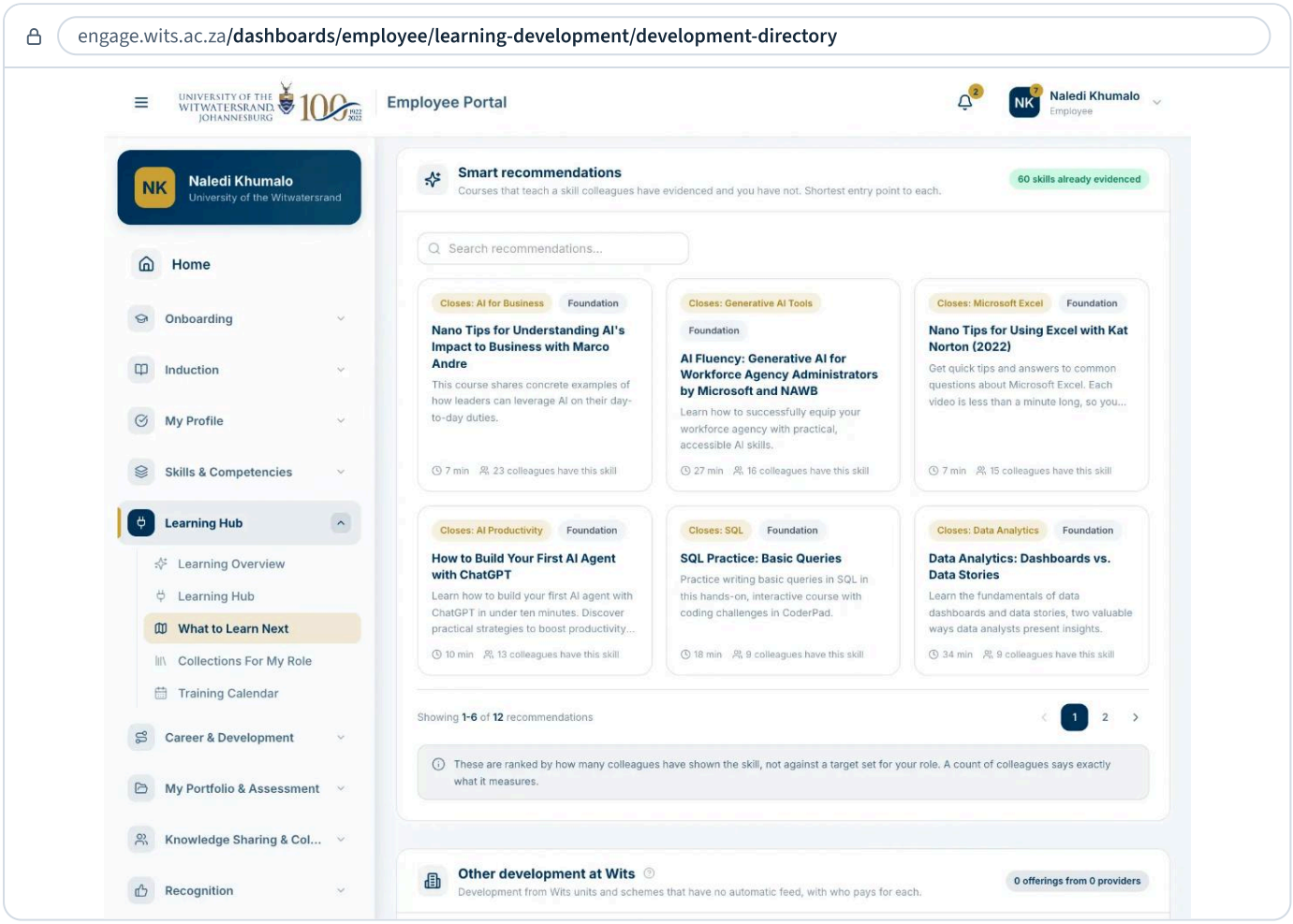
A sentence on what you want to learn is enough.

The card changes to **Your licence request is with HRDU.**, with the date you sent it. You get a notification in Engage when HRDU decides. Until then you can select **Withdraw my request**.

- **Approved:** look out for an invitation from LinkedIn Learning in your Wits email. If none arrives, select **Ask HRDU again**.
- **Declined:** the card shows the date and HRDU's reason. You can ask again.

Find what to learn next

Open **Learning Hub** › **What to Learn Next**. It picks courses for the gaps you have, rather than leaving you to search the whole library.



Each recommendation names the skill it gives you, how long it takes and how many colleagues already have that skill.

- **Asked of you**: skills staff development has made a priority for your role. Each one not yet met names a course under **Start with**.
- **Smart recommendations**: courses that teach a skill colleagues have and you do not yet, shortest first. Select a card to open the course in LinkedIn Learning.
- **Other development at Wits**: programmes, workshops and schemes run by Wits units, with who pays for each. It fills as staff development adds them. Attending one does not appear on your learning record.

Open the collections chosen for your role

A collection is a shelf of LinkedIn Learning courses that HRDU has chosen and put in order for a group of staff.

1. Open **Learning Hub › Collections For My Role**.
2. Choose **For you**, **Other groups** or **Everything** above the list.
3. Select **Open** on a collection to see its courses in HRDU's order, with the ones you have finished marked.

Each collection shows how many of its courses you have finished. A collection reaches you through your job family (a group of related work, such as Human Resources or Finance) or because it is for all staff. Until HRDU publishes a collection, the page says **No collection has been published yet**.

Book a place on a training session

1. Open **Learning Hub › Training Calendar**. **Coming up** lists every scheduled session by month, with its time, place or online link, facilitator, and how many places are left.
2. Select **Book a place** on the session you want.

The session now shows **You are booked**, and the page says **You are booked. Add it to your calendar so you do not miss it.** No one else is told. For an online session, a **Join online** link appears once you are booked.

If the session is full, the button reads **Join the waiting list**. When someone cancels, the first person waiting is booked automatically and told.

When HRDU has nothing scheduled, the page says **There is nothing scheduled at the moment.** Check back, or speak to HRDU about the training you need.

Add a session to your calendar

On a session you are booked on, select **Add to calendar**. Engage gives you a calendar file for the session. Open it, and your calendar (Outlook, for example) adds the event, with the joining link if the session is online.

Cancel a booking

1. On the session, select **Cancel my booking**, or **Leave the waiting list**.
2. Confirm when Engage asks.

The page says **Your booking is cancelled.** If anyone is waiting, your place goes to them.

> **TAKE CARE**
> Once a session has started you cannot book, cancel or leave the waiting list. The button then reads **Under way** or **Booking has closed**.

If HRDU calls off a session you were booked on, it moves to **Called off by HRDU** at the top of the page; there is nothing you need to do. Sessions you attended appear under **Your training history** once HRDU has taken the register.

Your skills and qualifications

For all staff · **Skills & Competencies** in the menu

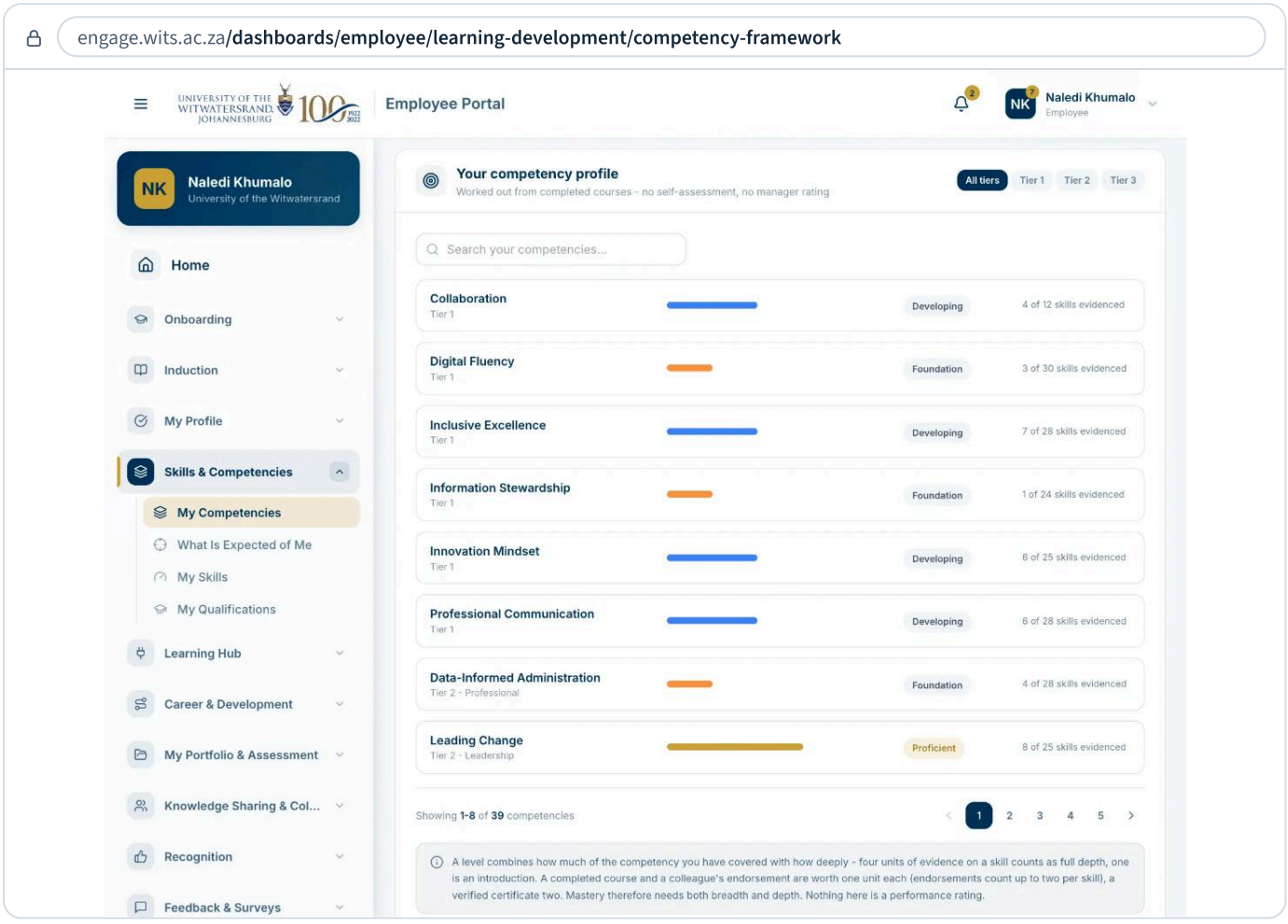
Engage works out your skills and competency levels from the LinkedIn Learning courses you have completed. Nobody has tested you or rated you: a level shows how much you have studied something, not how well you do it.

See where your learning places you

Open **Skills & Competencies** › **My Competencies**.

A competency is a broad ability Wits staff are expected to build, such as collaboration or digital fluency. Each is made up of several skills, and each sits in one of three tiers:

- **Tier 1**: expected of every member of staff.
- **Tier 2**: for a kind of role: academic, professional, technical or leadership.
- **Tier 3**: for one job family.



Each competency shows its tier, your level, and how many of its skills your completed courses cover. Filter by tier at the top right.

The levels, lowest to highest, are **Foundation**, **Developing**, **Proficient**, **Advanced** and **Mastery**. Your level rises as you complete courses that cover more of a competency's skills, and more courses on each skill. Select a competency to see the skills it is made of.

GOOD TO KNOW

A low level means your completed LinkedIn Learning courses do not cover that competency. It does not mean you cannot do it. Staff development wrote the framework in Engage; it is not a performance standard, and nothing here is a performance rating.

See the levels expected of you

Open **Skills & Competencies** › **What Is Expected of Me**. Staff development can set a level it expects on a competency, for all staff or for a job family or kind of role. The page lists each one that applies to you: the level required, where your own evidence puts you, who set it and when, and any date it is wanted by. Choose **Not there yet** or **Already met** to narrow the list. Until staff development sets a level that applies to you, the page says so.

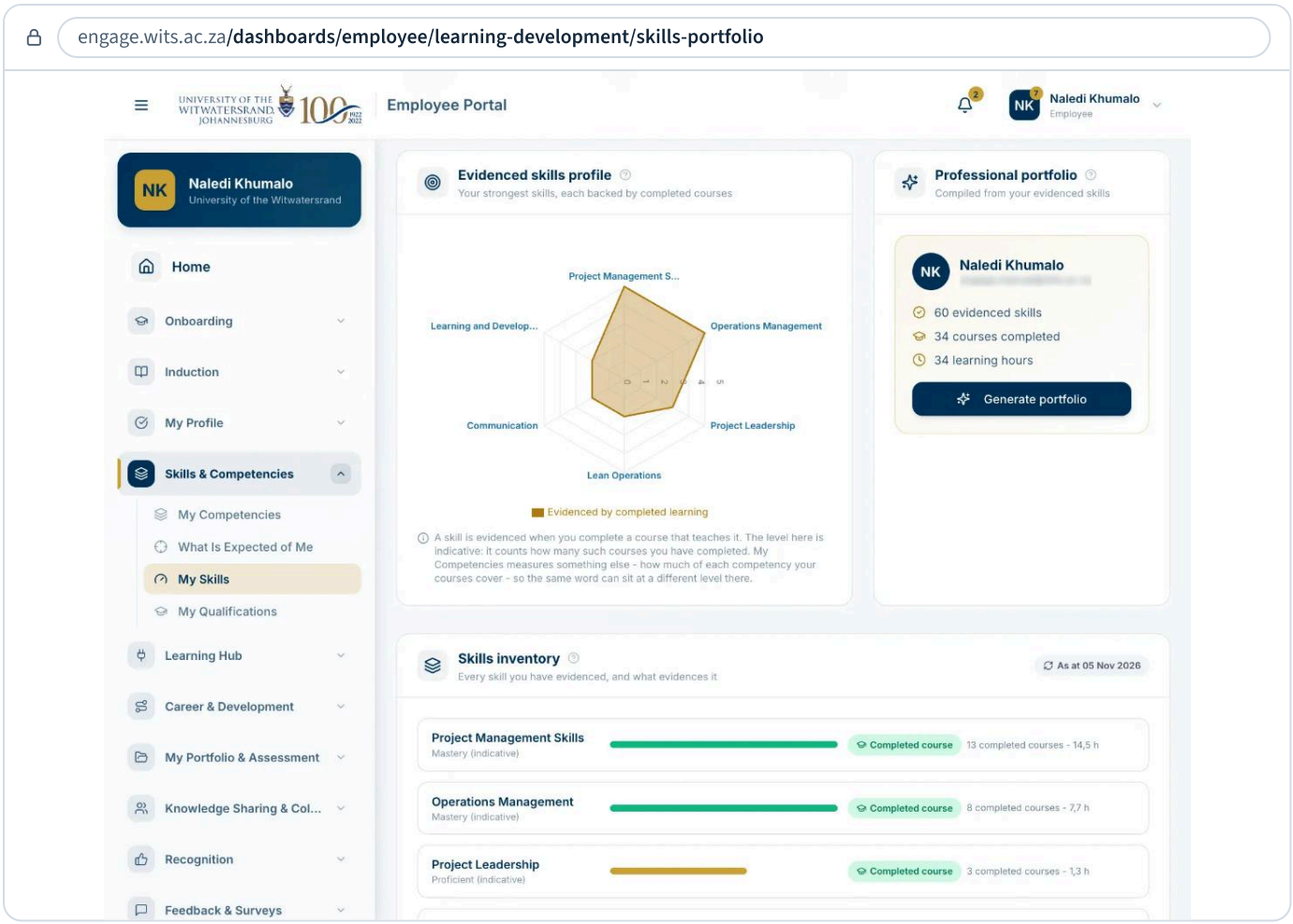
Rate your own skills

1. On **Skills & Competencies** › **My Competencies**, go to **Rate your own skills**.
2. Type a skill under **Find a skill** and choose it from the list.
3. Choose a level from **1. Foundation** to **5. Mastery**, then select **Save rating**.

Your own ratings sit beside the levels your courses earned and never change them. Only you and staff development can see them. On a rated skill, select a number to change it, or the cross to remove it.

See your skills

Open **Skills & Competencies** › **My Skills**. A skill appears when you complete a course that teaches it. A course you are partway through does not count yet.



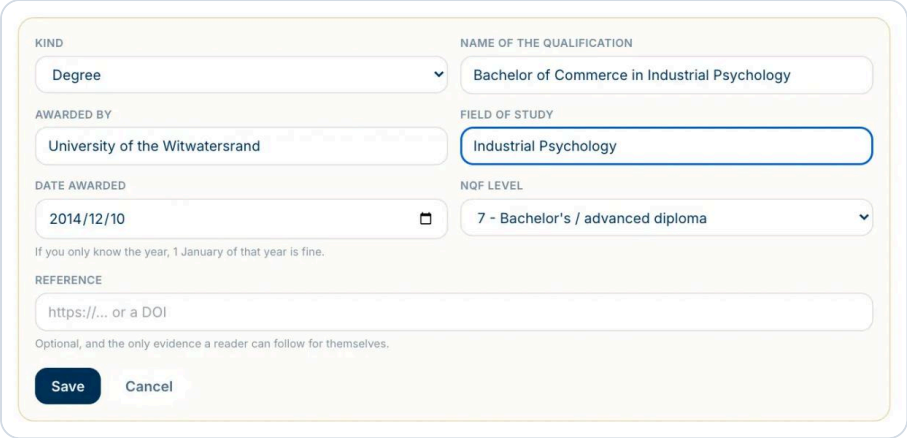
The further a point sits from the centre of the chart, the more courses you have finished in that skill.
Skills inventory lists every skill and the courses behind it.

The level beside each skill is marked **(indicative)**. It counts courses: one course is Foundation, two Developing, three or four Proficient, five to seven Advanced, eight or more Mastery. My Competencies works its levels out differently, from how much of each competency your courses cover, so the same skill can sit at a different level there. Each skill also says what shows it: **Completed course**, **Verified certificate** or **Endorsed**. Under **Professional portfolio**, select **Generate portfolio**, then **Export portfolio** to print it or save it as a PDF.

Add a qualification or a post you have held

Engage receives no qualifications or work history from anywhere else. What you add here is your own record, for promotion panels and your evidence portfolio.

1. Open **Skills & Competencies** › **My Qualifications**.
2. Under **Qualifications**, select **Add**.
3. Choose the **Kind**, then fill in the name, who awarded it, the field of study and the date. If you only know the year, 1 January of that year is fine.
4. Choose the **NQF level** if you know it, and add a web address under **Reference** if there is one.
5. Select **Save**.



The NQF level and the reference are optional.

To add a job, select **Add** under **Posts held**. Give the post, organisation and dates, and tick **I still hold this post** or **This post is at Wits** where they apply.

Each entry shows **Not checked** until staff development has seen your certificate and marked it **Checked**. If you change a checked entry, it goes back to **Not checked**.

TAKE CARE

The bin button removes an entry straight away, without asking.

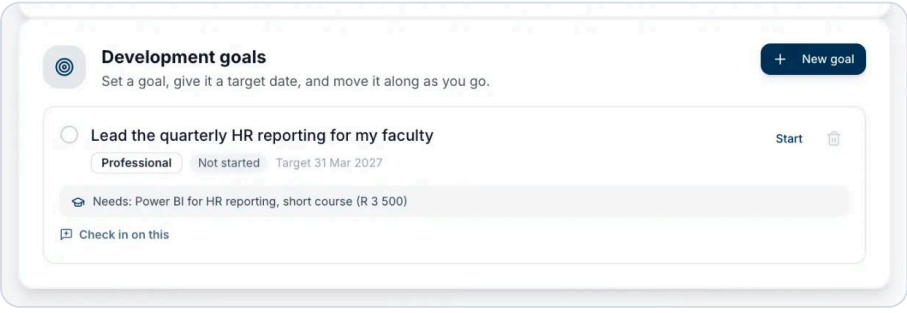
Your plan, your career and bursaries

For all staff · **Career & Development** in the menu

Set your goals for the year and agree them with your manager, see what a job family you are aiming for expects, and apply for Wits to fund your studies.

Write your development plan

1. Open **Career & Development** › **My Development Plan**.
2. Under **Development goals**, select **New goal**.
3. Type the goal under **What do you want to achieve?**, choose a category (Professional, Technical, Leadership or Qualification) and a target date.
4. Select **Add goal**.



A goal with the training it needs. **Start** and **Check in on this** move it along.

On each goal:

- **Start** moves it from **Not started** to **In progress**.
- **Check in on this** lets you set how far along it is and note what has moved. Select **Save check-in**.
- **Add the training this needs** records a course and its cost in rand. Your manager sees it when you send the plan.
- The circle beside the goal marks it complete. Each completed goal earns points.

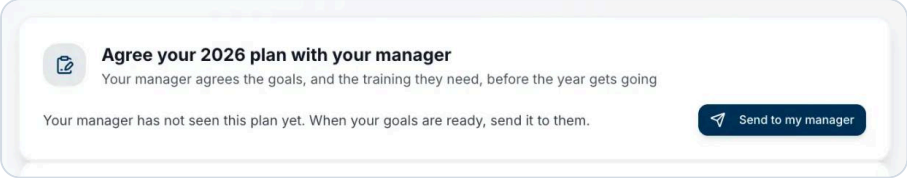
For a quick start, **Where you fall short** lists competencies you have not yet reached Proficient on. **Make this a goal** adds one as a goal due in three months.

TAKE CARE

The bin button on a goal deletes it straight away, without asking.

Send your plan to your manager for sign-off

Once you have at least one goal, select **Send to my manager** on the card headed **Agree your plan with your manager** (the card names the year).



The card says where your plan stands. Before you send it, it says your manager has not seen it.

The plan goes to the manager HR has recorded for you, and the card shows who has it and since when. If no manager is recorded for you, it goes to HRDU instead. You get a notification when they decide.

- **Agreed:** the card shows who agreed it and when. If you change your goals later, select **Send it again**.
- **Sent back:** the card shows the note explaining why. Make the changes, then select **Send it again**.

IF PEOPLE REPORT TO YOU

Their plans appear on this page under **Plans your team sent you**. Select a name to see the goals and the training each needs. Select **Agree**, or write a note and select **Send back**. They are told either way.

See who manages you, and your team

Open **My Profile** › **Who Manages Me**. It shows the manager HR has recorded for you, and what that lets them see of your development record. If it is wrong, select **This is not right**, say what is wrong, and select **Tell human resources**. HR is sent a notification; until they act, the line stays as it is.

If people report to you, **My Profile** › **My Team** shows each of them against the competency framework, and the course follow-ups you have been asked to observe, by the person themselves or by staff development. Select **Record observation** on one to answer it. Nobody is emailed about these requests: they wait on this page.

Set your job family

Wits does not record anyone's job family, so Engage guesses yours from the courses you have completed. Your job family decides which collections, pathways and competencies are aimed at you. To set it yourself, on **Career & Development › My Development Plan** under **Your job family**, select **Choose my job family** and pick one; it saves straight away. Choose **Let the platform work it out** to go back to the guess. If staff development has set it for you, ask them to change it.

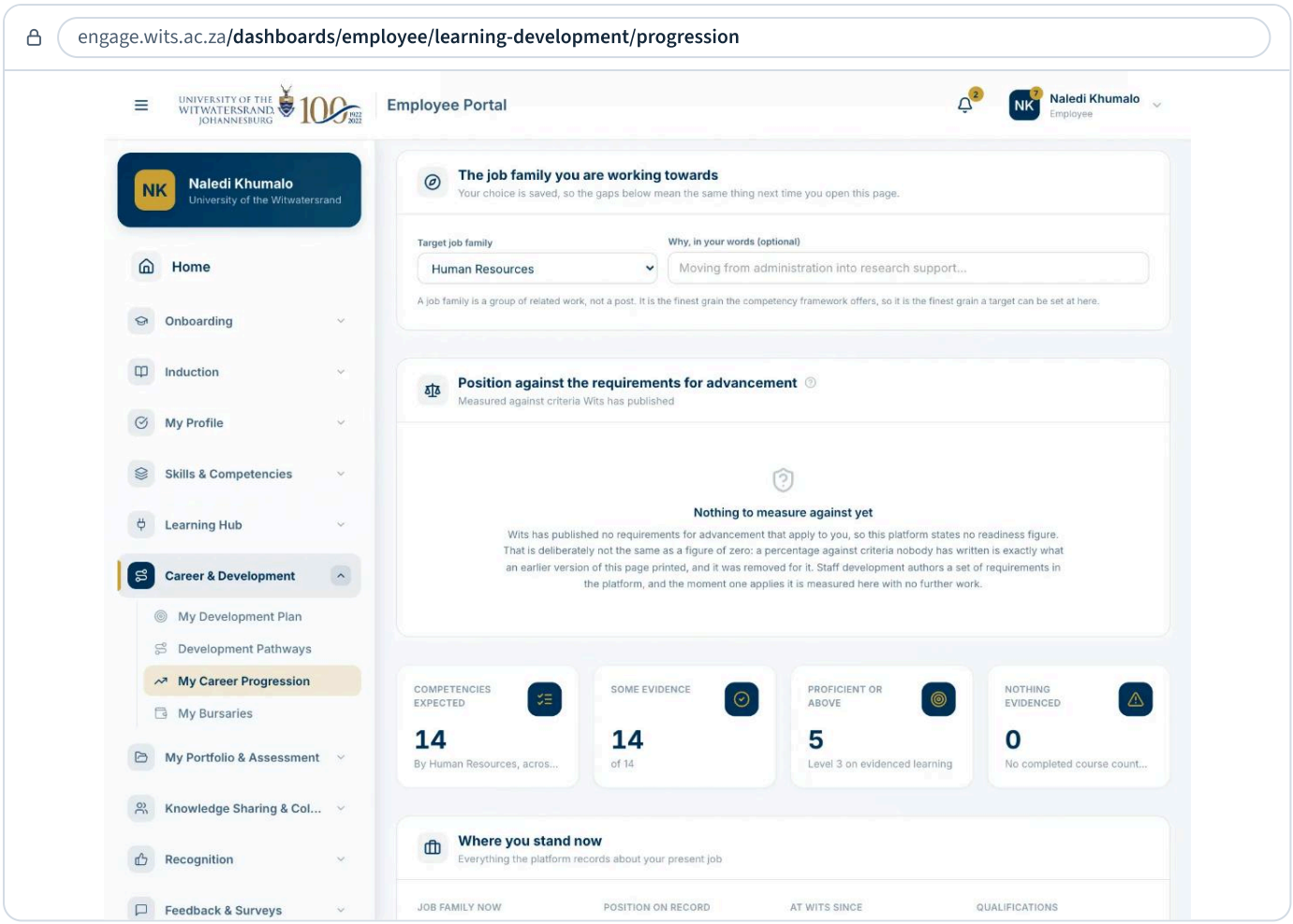
Follow a development pathway

Open **Career & Development › Development Pathways**. A pathway is a route through LinkedIn Learning courses, in the order staff development thinks they should be taken. **For your job family** lists the pathways for your job family and for all staff, with how many course steps you have completed. **All published pathways** shows the routes for other job families, if you want to follow one anyway. Select a pathway's name to see its steps.

A step that Wits runs itself, such as a workshop, can be part of a pathway, but nothing reports it as finished, so it is left out of your progress. Until staff development publishes a pathway, the page says **No published pathway applies to you yet.**

See what the job family you are aiming for expects

1. Open **Career & Development › My Career Progression**.
2. Choose a **Target job family**. Your choice is saved.
3. Optionally, say why under **Why, in your words**.



Once you choose a target, the page counts the competencies that family expects and how many you have reached Proficient on.

Below the figures, the page lists the competencies the family expects, where your completed courses put you on each, and the posts in the family. **Position against the requirements for advancement** measures you only against requirements Wits has published; until there are some, it says **Nothing to measure against yet**. The page does not tell you whether you will be promoted, and it does not rank you against colleagues.

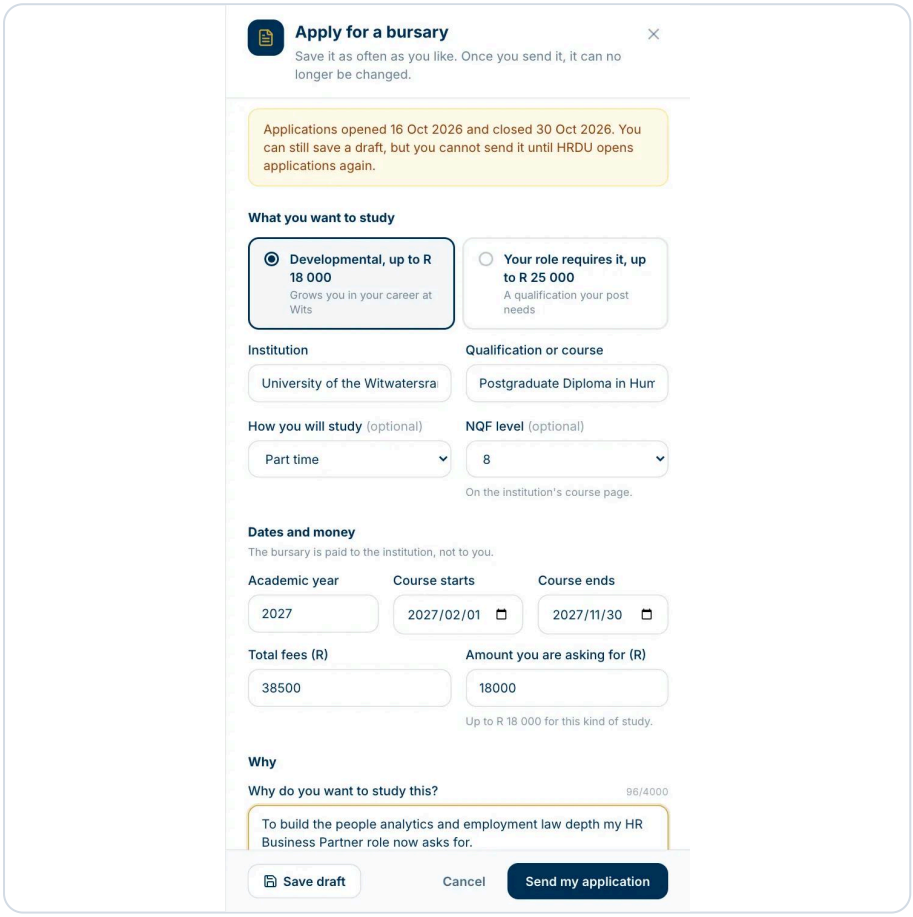
Apply for a bursary

A staff bursary is money Wits pays towards a qualification or course you study. Open **Career & Development** › **My Bursaries** and read **How the bursary scheme works** first. HRDU sets the limits and dates and can change them; the card always shows the current ones. When this manual was written:

- Wits pays up to R 18 000 a year for developmental study, or up to R 25 000 for study your role requires.
- You apply before you register for the course. Your manager supports the application first, then HRDU decides.
- You accept a bursary agreement before anything is paid, and the money goes straight to the institution, not to you.
- You send your results within 4 months of the course ending.
- If you fail, withdraw or do not send your results, what was paid becomes an interest-free loan, repaid over 6 months. The same applies if you leave Wits within 12 months of finishing (all of it) or 24 months (half).
- Applications can be sent only between the opening and closing dates on the card. Once the closing date has passed, the card says so: you can still save a draft, and send it when HRDU opens applications again.

Have these ready: the institution, the qualification or course, its start and end dates, the total fees, the amount you are asking for, and why you want to study it.

1. Select **New application**.
2. Choose the kind of study: **Developmental** (grows you in your career at Wits) or **Your role requires it** (a qualification your post needs).
3. Fill in **What you want to study**, **Dates and money** and **Why**. The form warns you if you ask for more than the limit or more than the fees.
4. Select **Save draft** to finish later, or **Send my application**.



The yellow note gives the application dates. Outside them you can save a draft but not send it.

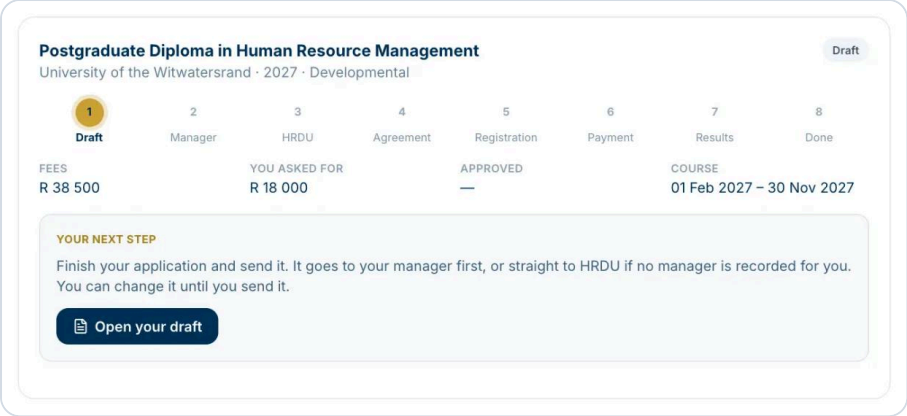
TAKE CARE

Once you send an application it can no longer be changed. You cannot send a new one while an earlier bursary was not passed, or its course has ended and you have not yet sent the results.

When you send it, your manager gets a notification asking for their support. If no manager is recorded for you, it goes straight to HRDU.

Follow your bursary through its stages

Each application on **My Bursaries** shows eight numbered stages, a status, and **Your next step**: the one thing you need to do, or what you are waiting for. **History** lists everything that has happened to it.



The highlighted stage is where your application is now. **Your next step** says what to do.

Stage	Status you see	What happens
Draft	Draft	Select **Open your draft** to finish it and send it.
Manager	With your manager	Nothing for you to do. You get a notification when your manager decides. If no manager is recorded for you, this stage reads **No manager** and the application goes straight to HRDU.
HRDU	With HRDU	Nothing for you to do. You get a notification when HRDU approves or declines it.
Agreement	Approved - accept it	Read the agreement, tick **I have read this agreement and I accept it.**, then select **Accept the agreement**. Nothing is paid until you do.
Registration	Upload your registration	Select **Choose a file** and pick your proof of registration (PDF, JPG or PNG, up to 10 MB), then **Upload proof of registration**.
Payment	Being paid	Nothing for you to do. HRDU pays the institution.
Results	Paid - studying	When you have your results, upload them with **Upload your results**. The due date is shown, in red once it has passed.
Done	Results with HRDU, then Completed	HRDU checks your results and closes the bursary. You get a notification.

You may also see:

- **Declined**: your manager did not support it, or HRDU declined it. Their note is shown. You can start a new application.
- **Withdrawn**: you withdrew it. **Withdraw** is there until you accept the agreement; after withdrawing you would have to apply again.
- **Now a loan**: the amount to repay, the reason, and over how many months. HR contacts you to arrange the salary deductions.

IF PEOPLE REPORT TO YOU

Their applications appear on this page under **Waiting for your support**. Read what they want to study and why, add a note under **Your note**, and select **Support** or **Don't support**. A note is needed if you do not support it; they and HRDU will see it.

Your portfolio and course feedback

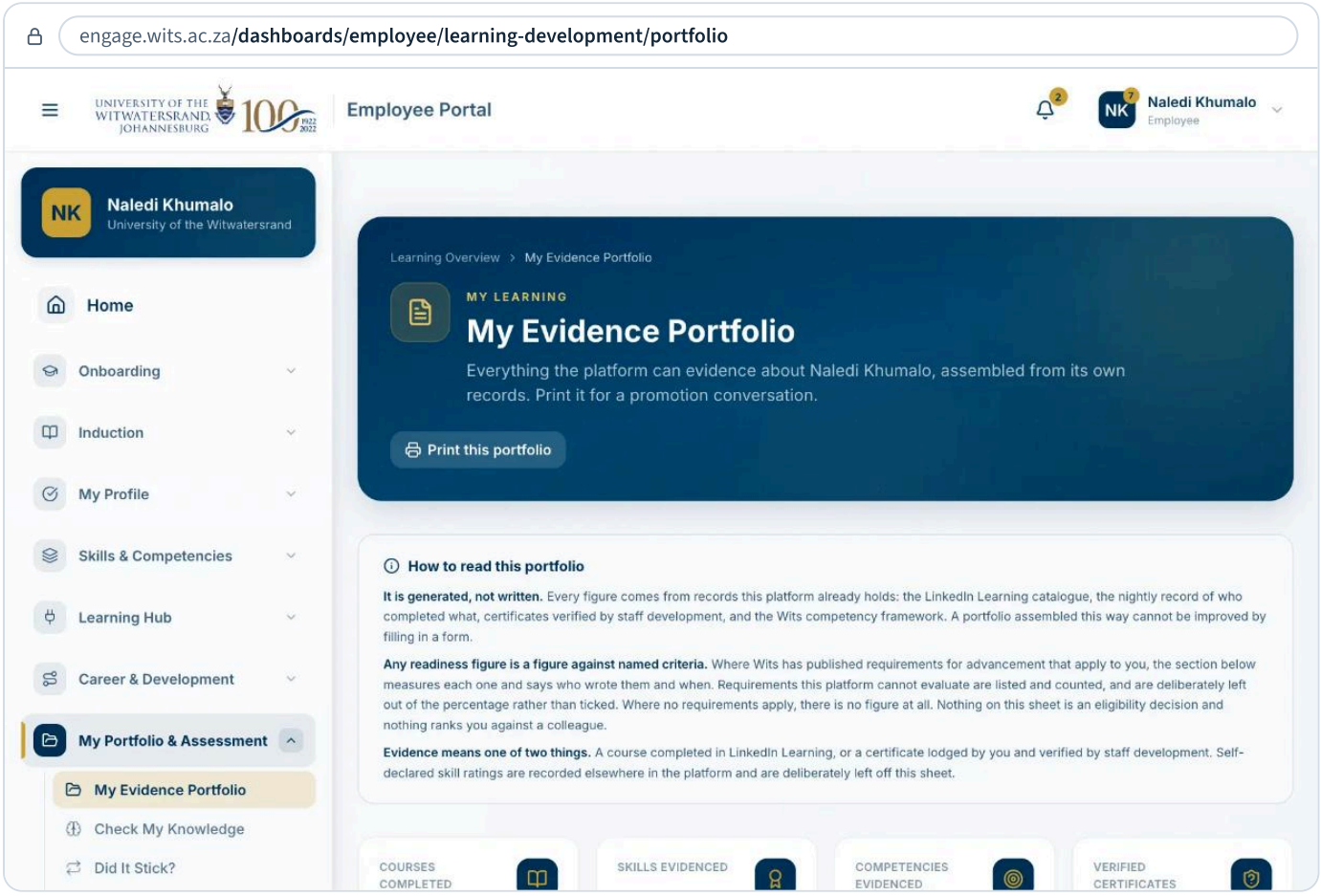
For all staff · **My Portfolio & Assessment** in the menu

Gather the evidence of your development in one printable place, and tell staff development what your courses were worth.

Add to your evidence portfolio and print it

Open **My Portfolio & Assessment** › **My Evidence Portfolio**. It brings together everything Engage holds about your development, for a promotion conversation. It grows as you:

- complete courses in LinkedIn Learning;
- send certificates for learning you did elsewhere (see below);
- add qualifications and posts on **Skills & Competencies** › **My Qualifications**;
- set goals and check in on them on **Career & Development** › **My Development Plan**.



Print this portfolio is in the header. **How to read this portfolio** explains it to whoever reads it.

Select **Print this portfolio** to print it or save it as a PDF. The printed copy leaves out the menu, the buttons and the **Certificates and endorsements** card, and includes every entry. A section headed **What this portfolio cannot speak to** lists what Engage does not hold, such as performance reviews, so a panel knows to ask for those separately.

Send a certificate for learning you did elsewhere

A course, workshop or qualification outside LinkedIn Learning counts towards your skills once HRDU has seen the certificate and verified it.

1. On **My Portfolio & Assessment** › **My Evidence Portfolio**, under **Certificates and endorsements**, select **Send a certificate**.
2. Under **The skill it shows**, start typing and choose the skill from the list.
3. Optionally, say under **What it is** which course it was, who ran it and when.
4. Under **Certificate file**, choose the certificate: a PDF, or a photo or scan as JPG or PNG, up to 10 MB.
5. Select **Send to HRDU**.

The certificate appears under **Your certificates** as **Waiting for HRDU**. You get a notification when HRDU decides. **Verified** means it now counts on your skills and this portfolio. **Not accepted** shows HRDU's reason. Only you and staff development can open the file. While it is waiting, select **Withdraw** to take it back.

GOOD TO KNOW

One certificate shows one skill. If it covers two, send it twice, once for each skill.

Endorse a colleague's skill

1. Under **Certificates and endorsements**, select **Endorse a colleague**.
2. Under **Colleague**, type their name or Wits email address and choose them.
3. Under **The skill**, choose the skill you have seen them use.
4. Optionally, say what you have seen them do, then select **Endorse**.

An endorsement counts for your colleague straight away, and they see it came from you. A skill counts at most two endorsements, however many colleagues give one. Endorsements you have given are listed on the same card; select **Take back** to remove one. You cannot endorse yourself.

Answer a knowledge check

A knowledge check is a short set of questions you answer before a piece of learning and again afterwards. The difference between the two scores shows what the learning taught you. Staff development writes and publishes them; until they publish one for you, **Check My Knowledge** says **No assessments are open to you yet**.

1. Open **My Portfolio & Assessment** › **Check My Knowledge**.
2. On an assessment, select **Sit the before-learning part**.
3. Choose an answer for every question, then select **Submit this attempt**.
4. When you have finished the learning, come back and select **Sit the after-learning part**.

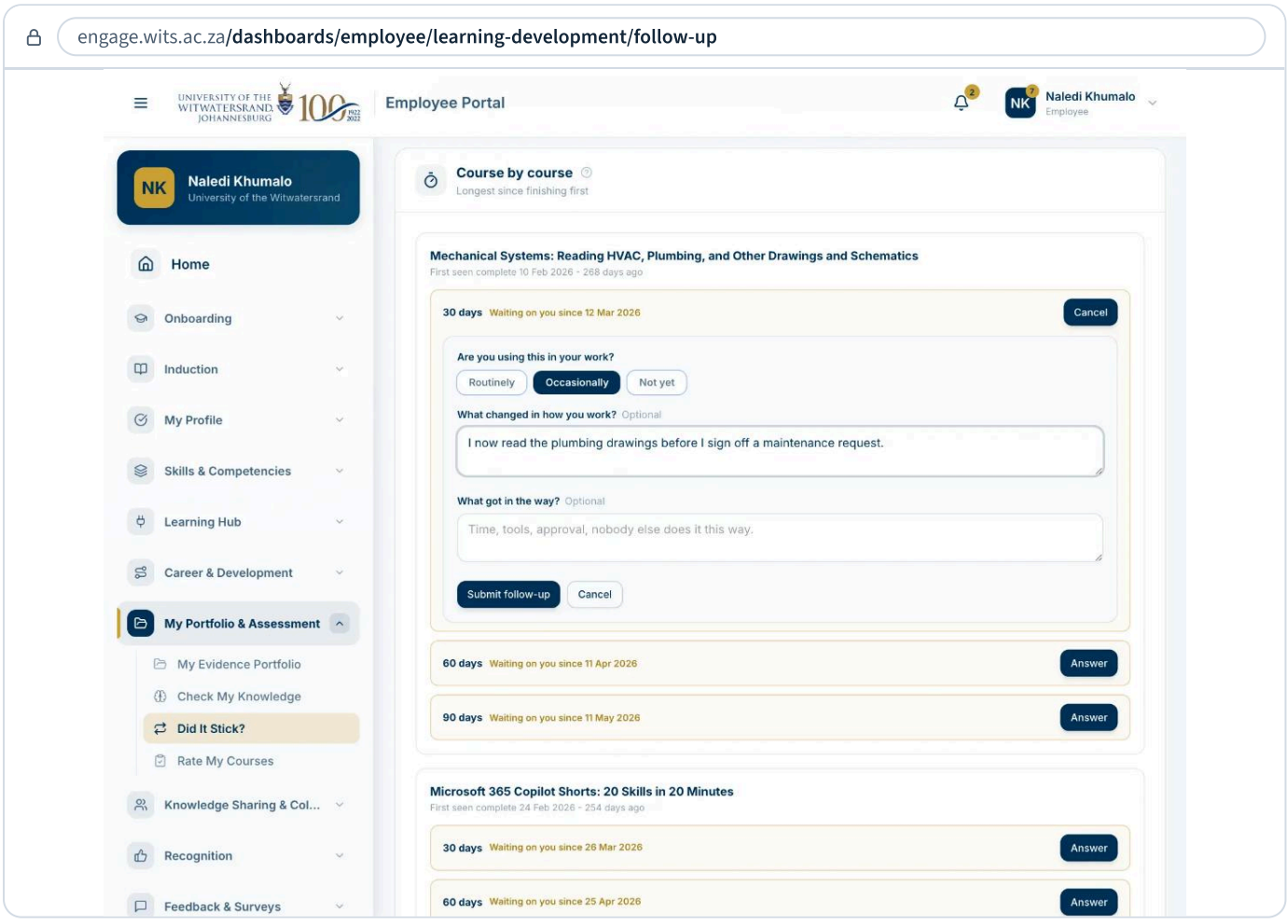
Each part can be answered only once. Your answers are marked for you, and **See my answers** appears once both parts are in. The after part falls due a week after Engage first sees the learning finished. Engage then reminds you in your notifications,

up to three times a week apart, and stops asking. Your score does not change your competency level, and nobody is ranked against anybody else.

Say whether a course stuck

Thirty, sixty and ninety days after you finish a course, a mark falls due on **Did It Stick?** asking whether you are using what it taught. Engage does not send you a reminder, so look in now and then.

1. Open **My Portfolio & Assessment** › **Did It Stick?**.
2. Under a course, find a mark that says **Waiting on you since** a date, and select **Answer**.
3. Choose **Routinely**, **Occasionally** or **Not yet**. Optionally, say what changed and what got in the way.
4. Select **Submit follow-up**.



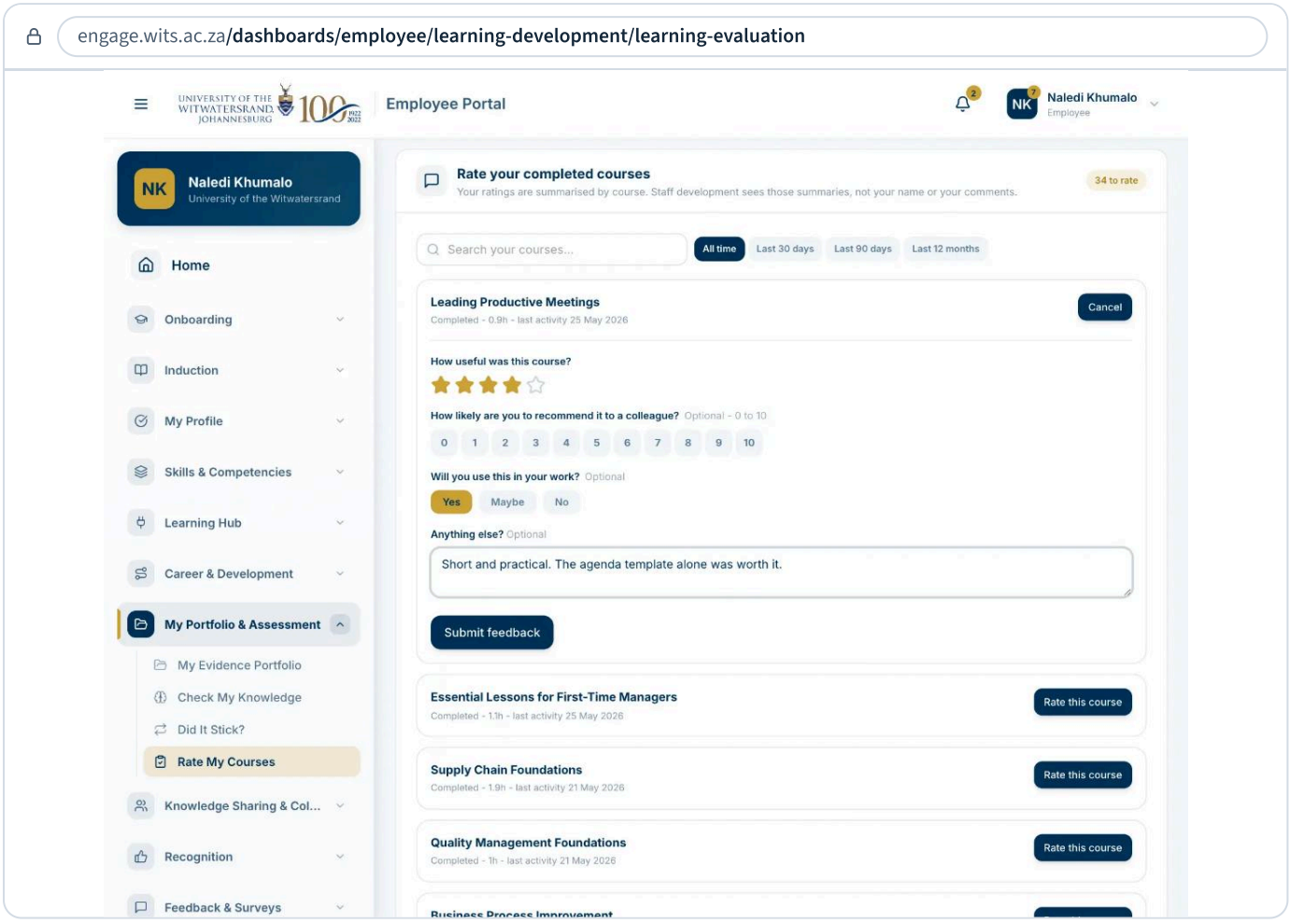
Answer one mark at a time. "Not yet" is an honest answer.

Change an answer later with **Revise**. If HR has recorded a manager for you, **Ask my manager** asks them to say what they have seen; their answer sits beside yours and is not mixed with it. If no manager is recorded, the page says so.

Rate a course

1. Open **My Portfolio & Assessment** › **Rate My Courses**. Every course you finish waits here; the ones you have not rated come first. Nobody sends you a reminder, but **Awaiting Your Rating** on Learning Overview counts them.

2. Select **Rate this course**.
3. Choose how useful it was, from one to five stars. Optionally, say how likely you are to recommend it (0 to 10), whether you will use it in your work, and anything else.
4. Select **Submit feedback**.



Only the stars are required. The rest is optional.

The course then shows **Rated**; select **Edit** to change your rating. Everyone else, staff development included, sees ratings only as a summary per course, never your name or your comment.

Sharing what you know

For all staff · **Knowledge Sharing & Collaboration** in the menu

Learn from colleagues and pass on what you know, through pairings, communities of practice and a record of your own professional contributions.

Find a mentor or share a skill

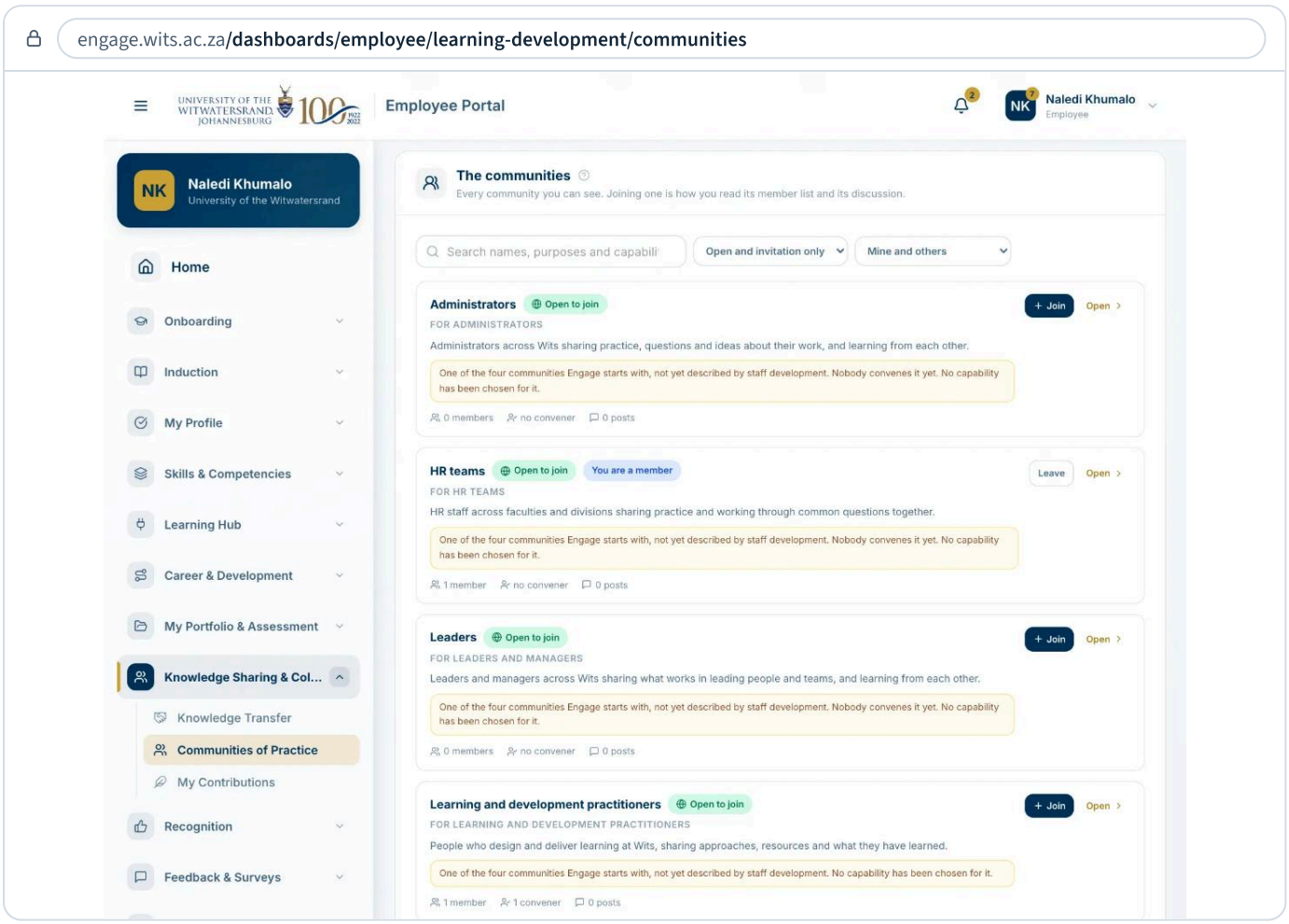
Open **Knowledge Sharing & Collaboration** › **Knowledge Transfer**. It lists the pairings you are part of: one skill passing between two colleagues. Each shows whether **You are teaching** or **You are learning**, the colleague, and whether it is **Proposed**, **Under way** or finished.

You cannot start a pairing here. Staff development sets them up, putting someone who has shown a skill alongside someone whose role needs it. To be paired, as a mentor or as a learner, speak to HRDU.

Join a community of practice

A community of practice is a group of colleagues who do the same kind of work and learn from each other, such as administrators, leaders, HR teams or learning and development practitioners.

1. Open **Knowledge Sharing & Collaboration › Communities of Practice**.
2. On a community marked **Open to join**, select **Join**.



After you join, the community shows **You are a member** and a **Leave** button.

Select **Open** on a community to see who is in it, what the group has been learning, and its discussion. As a member you can write a post and select **Post**, or reply to one. Posts are seen by the members and by staff development. Select **Leave** to leave.

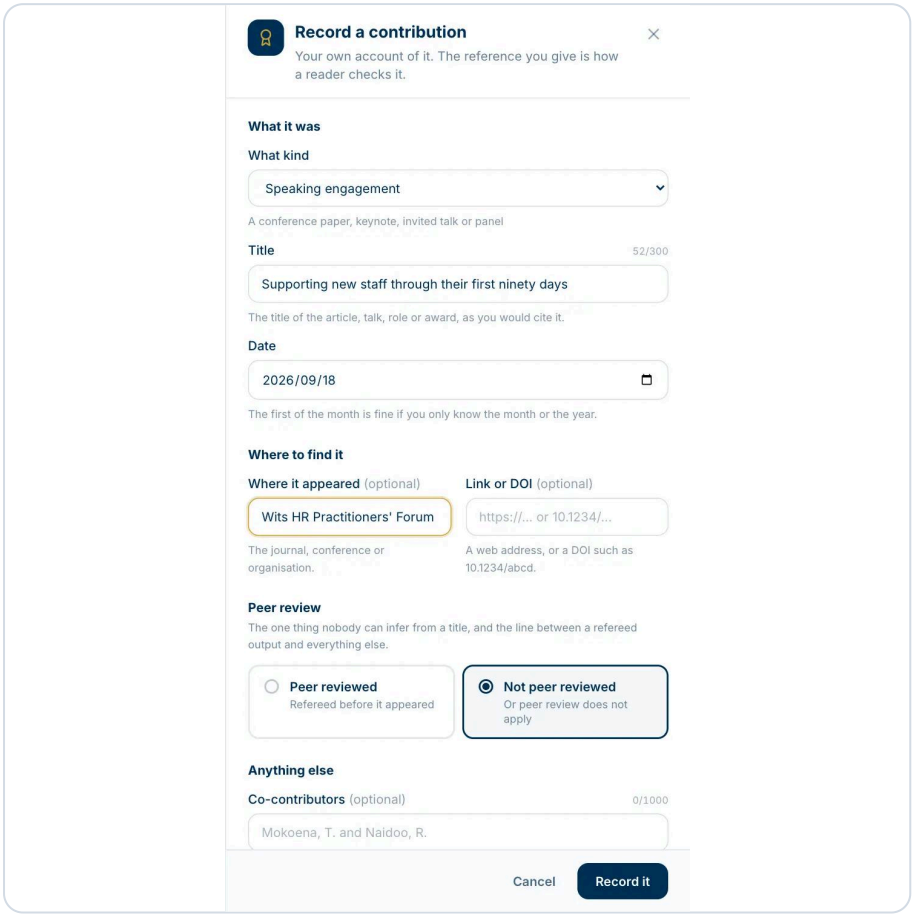
A community marked **Invitation only** cannot be joined here. Its conveners, the colleagues who run it, add its members.

Record a contribution

Publications, talks, postgraduate supervision, mentoring, seats on boards and awards reach Engage only if you record them.

1. Open **Knowledge Sharing & Collaboration › My Contributions**.

2. Select **Record a contribution**.
3. Choose **What kind**, then give the **Title** and **Date**.
4. Optionally, add **Where it appeared**, a **Link or DOI**, whether it was peer reviewed, co-contributors and notes.
5. Select **Record it**.



Only the kind, title and date are required.

It then appears under **My contributions**. Select **Correct** to change it, or **Remove** to delete it straight away. Only you can add, change or remove your entries. Nobody checks them, and staff development can see them.

PART 4 · EVERY STAFF MEMBER

Recognition, surveys and feedback

For every member of staff. Thank a colleague, celebrate birthdays and work anniversaries, follow your points, answer your new-hire surveys and talk to HR.

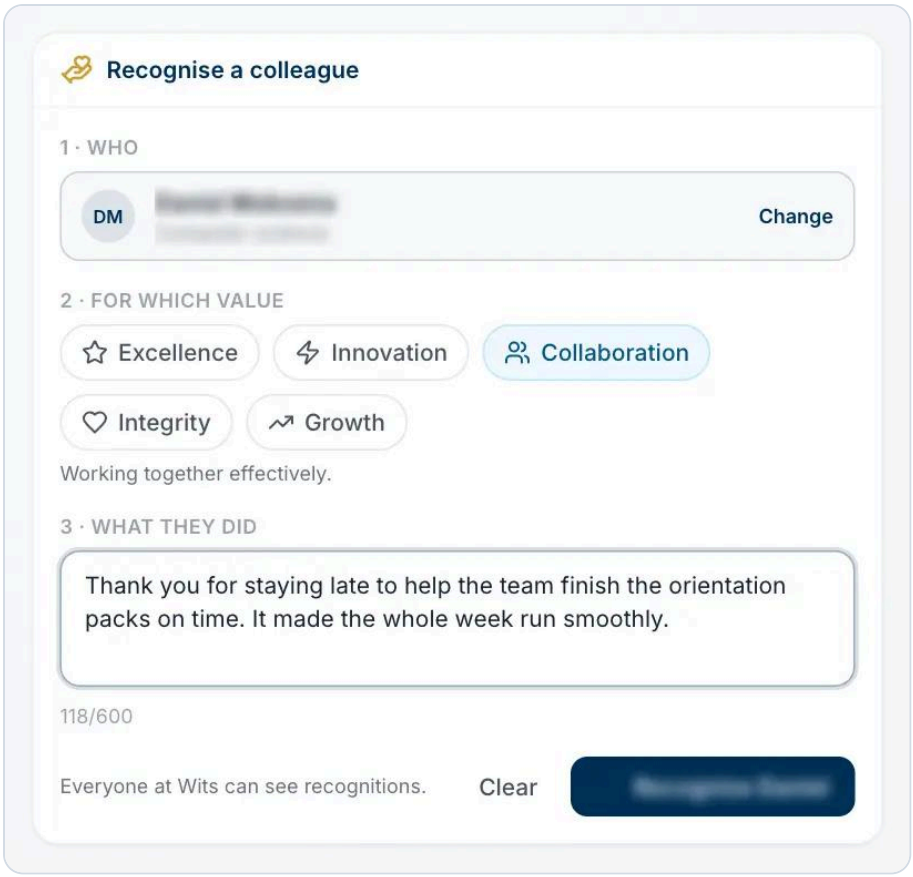
Recognition

For all staff · **Recognition** in the menu

Recognition is how you thank a colleague in public for something they did. Everyone at Wits who signs in to Engage can see a recognition.

Recognise a colleague

1. Open **Recognition › Daily Recognition**. The form **Recognise a colleague** is at the top.
2. Under **1 · Who**, type part of the person's name or department in the search box, then select them in the list. To pick someone else, select **Change**.
3. Under **2 · For which value**, select one of the five Wits values: **Excellence**, **Innovation**, **Collaboration**, **Integrity** or **Growth**.
4. Under **3 · What they did**, write what the person did and why it mattered. You need at least 10 characters, and you can write up to 600.
5. Select the button at the bottom. Until you choose someone it reads **Send recognition**; after that it shows **Recognise** and the person's first name.



All three steps filled in. The button stays pale until you have chosen a person and a value and written at least 10 characters. **Clear** beside it empties the form.

When you send it:

- A green message confirms it was sent.
- Your colleague gets a notification that you recognised them, with your message.
- The recognition appears at the top of the feed on the same page, where everyone can see it.
- You earn 10 points and your colleague earns 25. Each of you can earn these points up to ten times a month. After that, recognitions still go through, but earn nothing more that month.

To start again, select **Clear**. It appears once you have filled anything in, and empties all three steps. Nothing is sent until you select the send button.

TAKE CARE

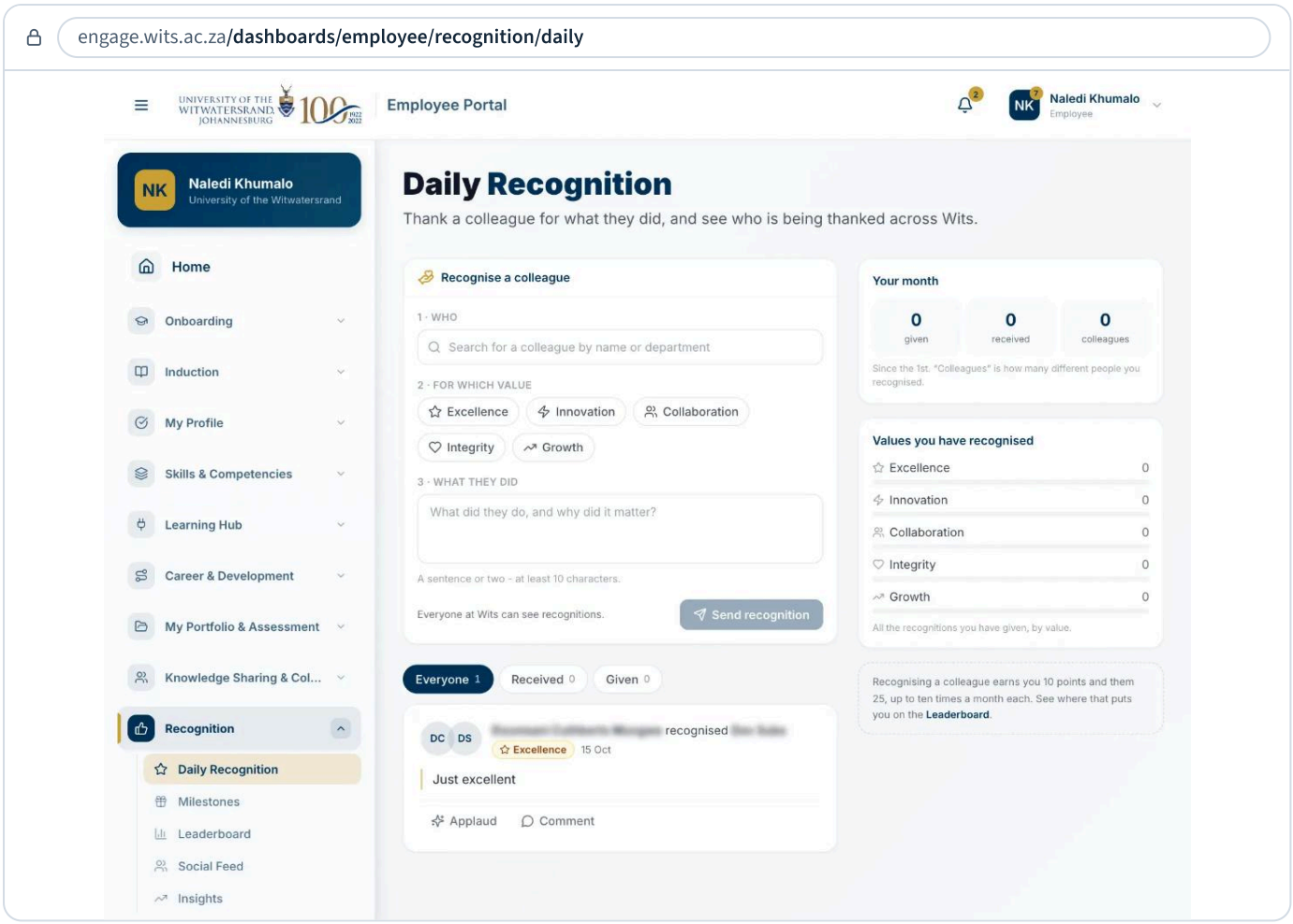
You cannot change or delete a recognition after you send it.

Applaud or comment on a recognition

Below the form is the feed of recognitions. Choose **Everyone**, **Received** or **Given** to filter it. A recognition made to you has a gold border.

- Select **Applaud** to add your applause. It changes to **Applauded**; select it again to take your applause back.
- Select **Comment**, type in the box **Add your congratulations…**, then press Enter or select the arrow. You can **Delete** your own comments.

Both the person who gave the recognition and the person who received it get a notification when you applaud or comment.

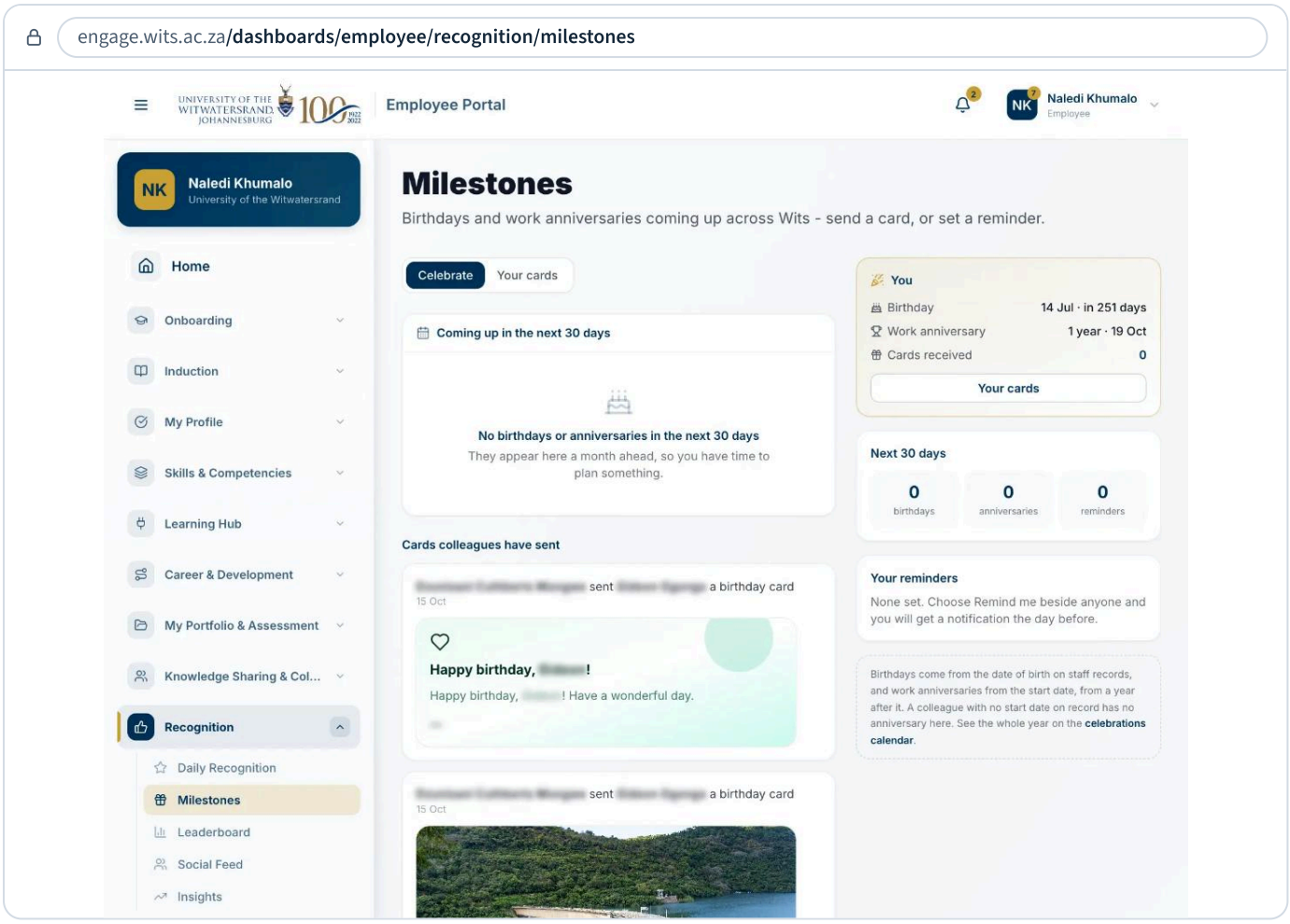


The feed on the left. On the right, **Your month** counts what you gave and received since the 1st, and how many different colleagues you recognised.

See birthdays and work anniversaries

Open **Recognition › Milestones**. **Coming up in the next 30 days** lists colleagues' birthdays and work anniversaries, split into **Today and this week** and **Later this month**.

- Select **Remind me** beside a colleague to get a notification the day before. It then reads **Reminder on**, and the person is listed under **Your reminders** on the right. Select it again to turn the reminder off.
- Your own dates are in the **You** panel on the right: your next birthday, your work anniversary and how many cards you have received.
- Select the **Your cards** tab to read every card colleagues have sent you, grouped by occasion.



Milestones: who is celebrating soon, with **Remind me** and **Send a card** beside each person.

A milestone brings you cards from colleagues and a notification for each one. On the day itself, a banner at the top of the page wishes you well and opens your cards. Milestones do not earn points.

GOOD TO KNOW

Birthdays come from the date of birth on your staff record, and work anniversaries from your start date, beginning a year after it. A colleague with no start date on record has no work anniversary on this page. If a date in your **You** panel shows **Not on your record** or **Start date not recorded**, Engage does not have it.

Send a colleague a card

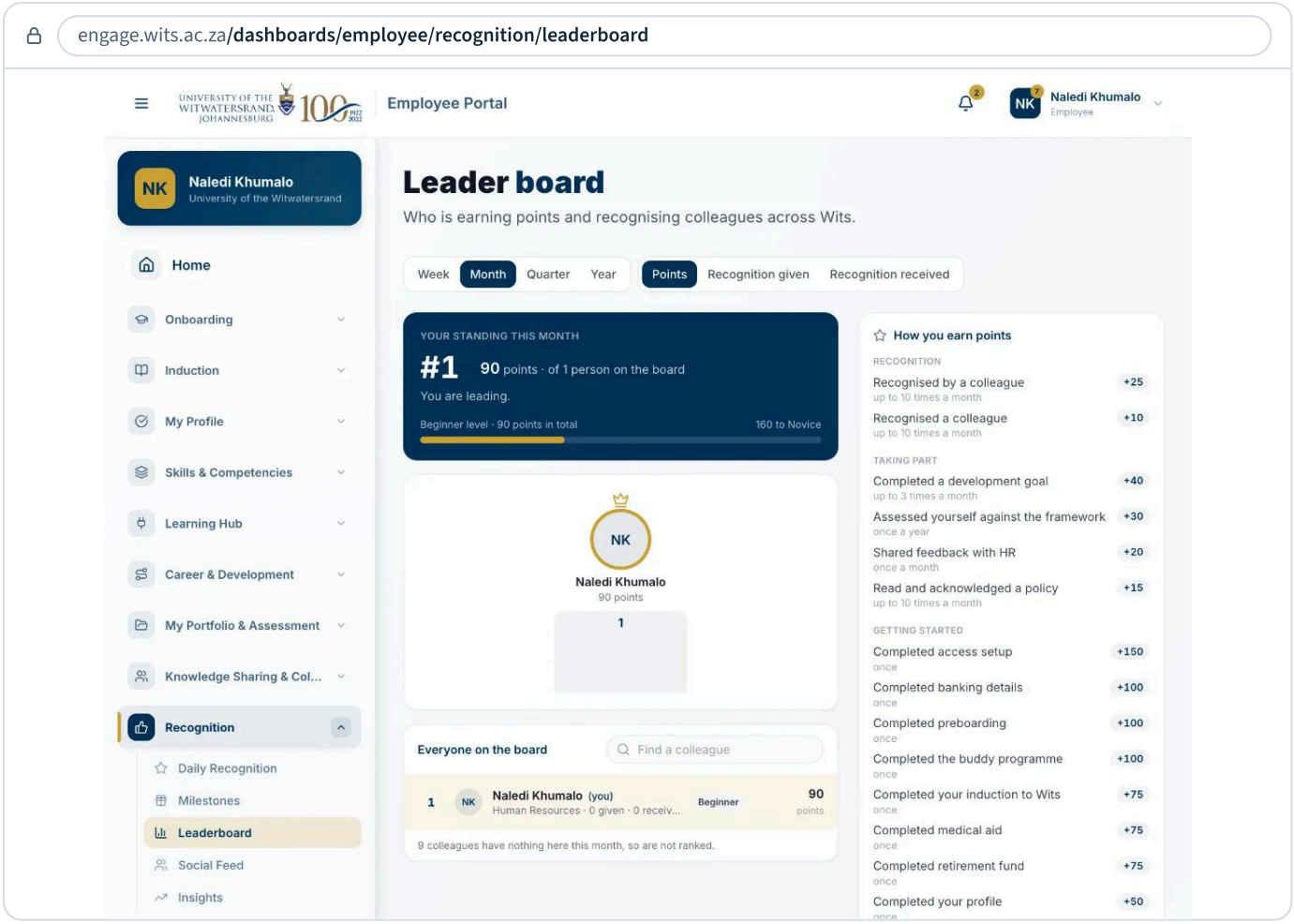
1. On **Recognition** › **Milestones**, select **Send a card** beside the colleague.
2. Under **Choose a card**, select a design, or select **Your photo** to use a picture of your own (up to 8 MB).
3. Under **Your message**, select one of the ready-made lines or write your own. The **Preview** shows the card as it will look.
4. Select **Send card to** and the colleague's first name, or **Cancel** to close it.

Your colleague gets a notification, and the card appears under **Cards colleagues have sent**, where everyone can see it.

Read the leaderboard

Open **Recognition** › **Leaderboard**. Choose a period (**Week**, **Month**, **Quarter** or **Year**) and what to rank by (**Points**, **Recognition given** or **Recognition received**).

- The dark panel at the top is your standing: your place, your score, how far you are behind the person above you, and your progress to the next level.
- The top three stand on a podium, then **Everyone on the board** lists the rest. Use **Find a colleague** to search it. Your own line is shaded and marked (you).
- Only people who scored in the period are ranked. People with the same score share a place.



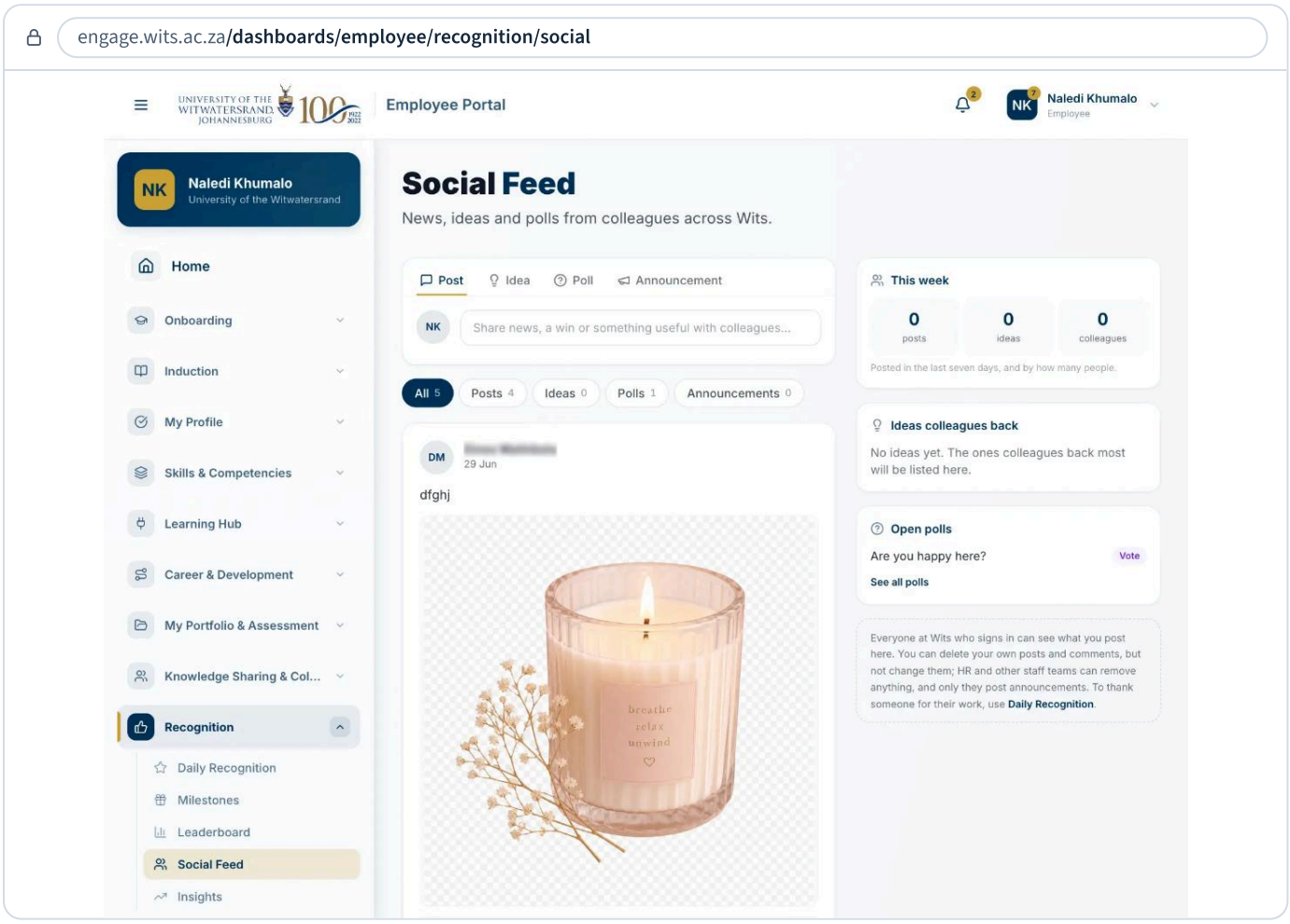
Your standing leads the page. On the right, **How you earn points** and **Levels** always show the current amounts.

Post, share an idea or vote on the Social Feed

Open **Recognition** › **Social Feed**. This is for news, ideas and quick polls. To thank someone for their work, use Daily Recognition instead.

1. In the box at the top, choose **Post**, **Idea** or **Poll**.
2. Write your post or idea. To add pictures or videos, select **Photo or video**. For a poll, write the question and at least two options; select **Add option** for more, up to six.
3. Select **Post**, **Share idea** or **Post poll**. To start again, select **Cancel**.

- Under each item, select **Like** (on an idea, **Back this**) or **Comment**. The author gets a notification. You can **Delete** your own comments.
- To remove a post, idea or poll of your own, select **Delete** beside **Comment**, then **Delete** again to confirm, or **Cancel**. Its comments, likes and pictures go with it.
- On a poll, tap an option to vote. Results are always visible, and you can tap another option to change your vote.
- Use **All**, **Posts**, **Ideas**, **Polls** and **Announcements** to filter the feed.
- Announcements from the last two weeks are pinned above the feed. Only HR and other staff teams can post announcements.



Write at the top, filter underneath. The right-hand panels show the week's activity, the ideas colleagues back most, and polls you can still vote in.

TAKE CARE

Everyone at Wits who signs in can see what you post. You can delete your own post, idea or poll, but not change it, so read it through before you select **Post**. HR and the other staff teams can remove anything on the feed.

See how recognition is spreading

Open **Recognition** › **Insights** and choose a period. The figures count recognitions across all of Wits, not just yours:

- **Recognitions**, **People taking part** and **Applause and comments**, each compared with the period before.
- **Your part**: how many recognitions you gave and received.

- A chart of recognitions over time, the values people are thanked for, the most recognised and most generous colleagues, and a table by department.

If nobody has been recognised in the period you chose, the page says so. It fills as colleagues recognise each other.

Points and levels

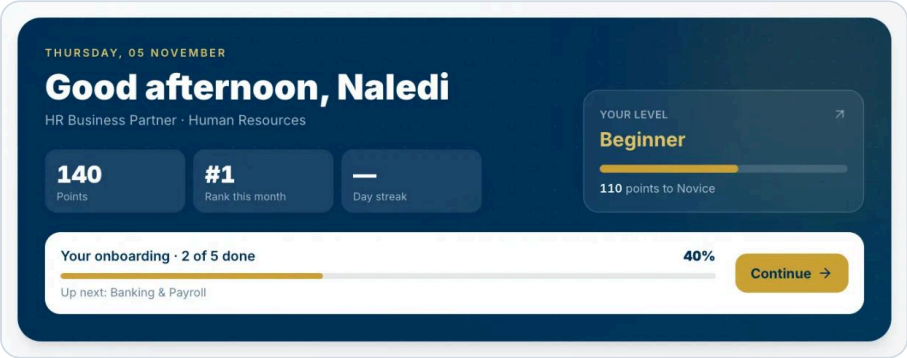
For all staff · on **Home**

You earn points for taking part: finishing onboarding, recognising colleagues, reading policies and more. Your level grows with every point you have ever earned.

Find your points and level

Your points are not in the menu. Open **Home** and use any of these:

- The **Your level** panel in the blue band at the top. Select it to open your points.
- **All points** at the top of **Recently earned**.
- The **My Points** shortcut.

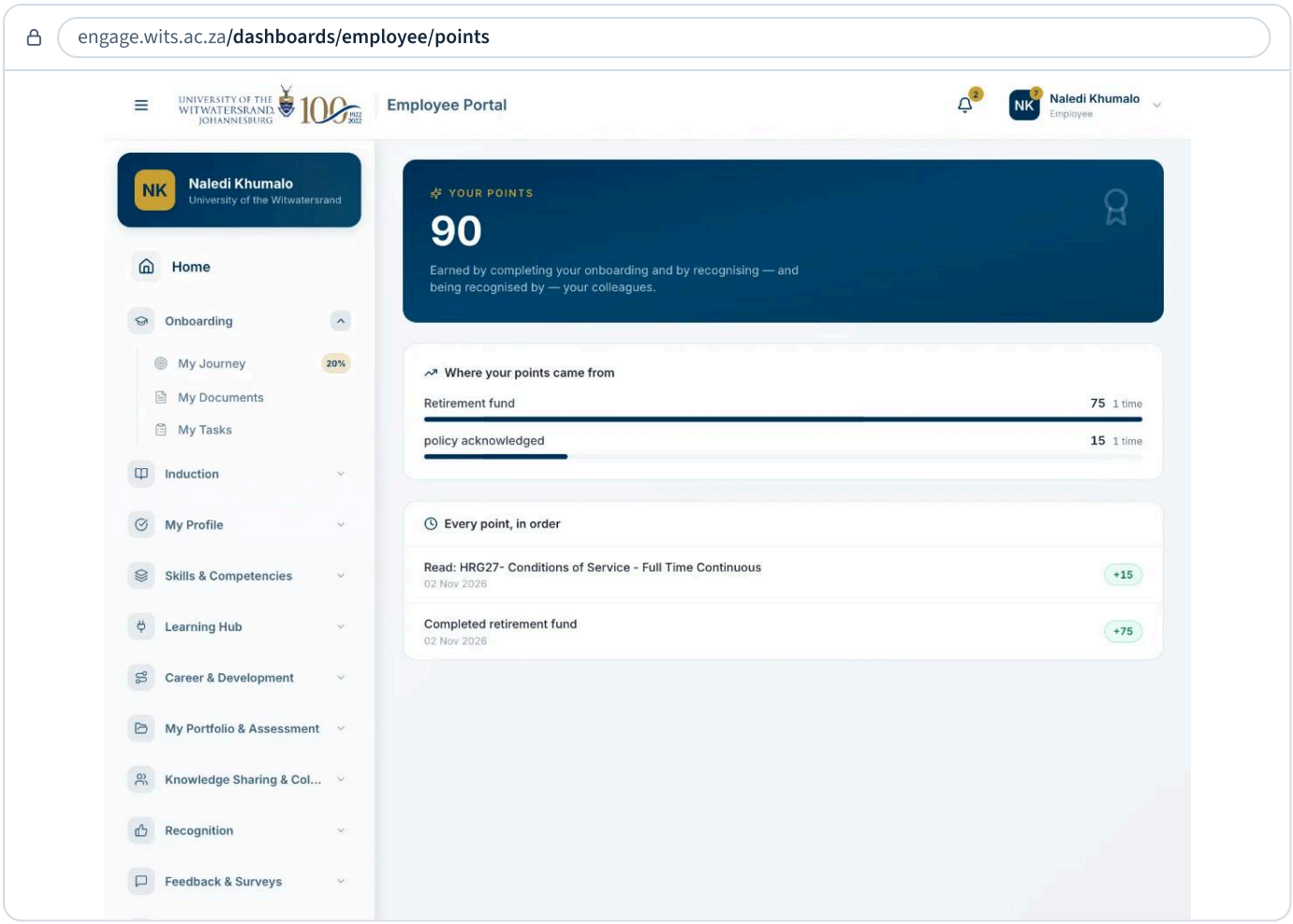


On Home, **Points** is your total. **Your level** shows how many points you need for the next level; select it to see every point.

See where every point came from

The points page has three parts:

- **Your points**: your total.
- **Where your points came from**: each kind of award, what it has given you in all, and how many times.
- **Every point, in order**: each award with its date and amount, newest first.



The total is exactly the sum of the list below it.

If something that earned points is later withdrawn, a minus entry is added to the list. The original entry stays, so the history is complete. Before you have any points, the page says **No points yet**.

Earn points

These are the amounts when this manual was written. HR can change them, and the **How you earn points** panel on the Leaderboard always shows the current ones.

What you do	Points	How often
Be recognised by a colleague	25	Up to 10 times a month
Recognise a colleague	10	Up to 10 times a month
Complete a development goal	40	Up to 3 times a month
Assess yourself against the competency framework	30	Once a year
Share feedback with HR	20	Once a month
Read and acknowledge a policy	15	Up to 10 times a month
Finish your induction	75	Once

What you do	Points	How often
Finish each onboarding step	50 to 150 a step	Once each

Understand levels

Your level is measured on every point you have ever earned, so it never resets when a new month starts.

Level	Points earned in all
Beginner	Under 250
Novice	250 to 499
Intermediate	500 to 749
Advanced	750 to 999
Expert	1,000 or more

Gold, silver and bronze are not levels. They mark only the top three on the Leaderboard.

Surveys and feedback

For all staff · **Feedback & Surveys** in the menu

Surveys are short check-ins that HR sends you after you join. Feedback is anything you want to tell HR, at any time.

Answer a survey

New staff get a short survey 30, 60 and 90 days after joining, counted from your start date (or from your first sign-in if Wits has no start date for you). A survey reaches you only once HR has switched it on. Each one appears on its day and is due a week later.

1. Open **Feedback & Surveys** › **Surveys**.
2. Under **Pending Surveys**, select **Start Survey**.
3. Answer each question, then select **Next**. Questions marked * must be answered. Use **Previous** to go back.
4. On the last question, select **Submit Survey**.

The first question is always a score from 0 (**Not at all likely**) to 10 (**Extremely likely**), such as how likely you are to recommend Wits as a place to work. The others ask how much you agree with a statement, or ask for a written answer.

When you submit, a message confirms that your answers have been sent to HR. The survey moves to **Completed Surveys** with the date you sent it and your answer to the first question, labelled **NPS Score** (Net Promoter Score, a common measure of how likely people are to recommend a place). You cannot answer the same survey twice.

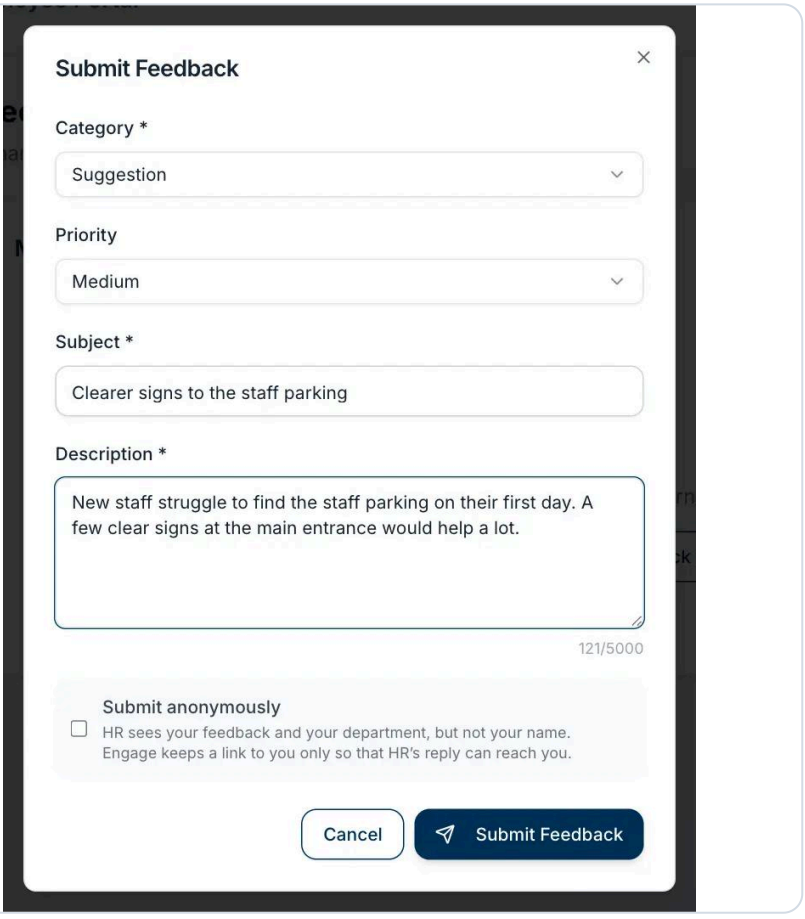
GOOD TO KNOW

Surveys are not anonymous. Your answers reach HR linked to your name, and HR uses them to see how new staff are settling in.

A notification tells you on the day a survey opens, with its due date. If the page shows **No Surveys Yet**, nothing is waiting for you. The card says when your next survey opens, or which surveys HR has switched on, or that HR is not sending any surveys at the moment. A survey still open after its due date is marked **Overdue**.

Send feedback to HR

1. Open **Feedback & Surveys** › **Feedback to HR** and select **Submit Feedback**.
2. Choose a **Category**: Suggestion, Concern, Idea, Experience, Compliment or Other.
3. Choose a **Priority**: Low, Medium, High or Urgent. It starts on Medium.
4. Give it a **Subject** and write the **Description**, up to 5,000 characters.
5. If you do not want HR to see your name, tick **Submit anonymously**.
6. Select **Submit Feedback**. To close the form without sending, select **Cancel**.



Category, Subject and Description are required. **Submit anonymously** is at the bottom.

What happens next:

- Your feedback goes to HR and appears under **My Feedback** with the status New.

- HR sees the category, priority, subject and description, with your name and department. If you ticked **Submit anonymously**, HR sees Anonymous instead of your name, but still sees your department. Engage keeps a link to you only so that HR's replies reach you.
- Your first feedback each month earns 20 points. The message after you send tells you whether you earned them.
- When HR replies, you get a notification. Select the item in **My Feedback** to read the reply under **HR Responses**.

TAKE CARE

You cannot change or withdraw feedback after you send it.

Follow up on your feedback

Each item in **My Feedback** shows its category, priority, status, date and how many replies HR has sent. HR moves it through these statuses: **New**, **Under Review**, **In Progress**, **Resolved** and **Closed**. A change of status shows here, but does not send you a notification; a reply does.

If you have not sent anything yet, the page says **No feedback yet**, with a button to send your first.

For HR

For the HR team. Almost every task here reads or changes another person's record, so each one says whose record changes, what that person then sees, what sends someone a message, and what cannot be undone.

Your HR dashboard

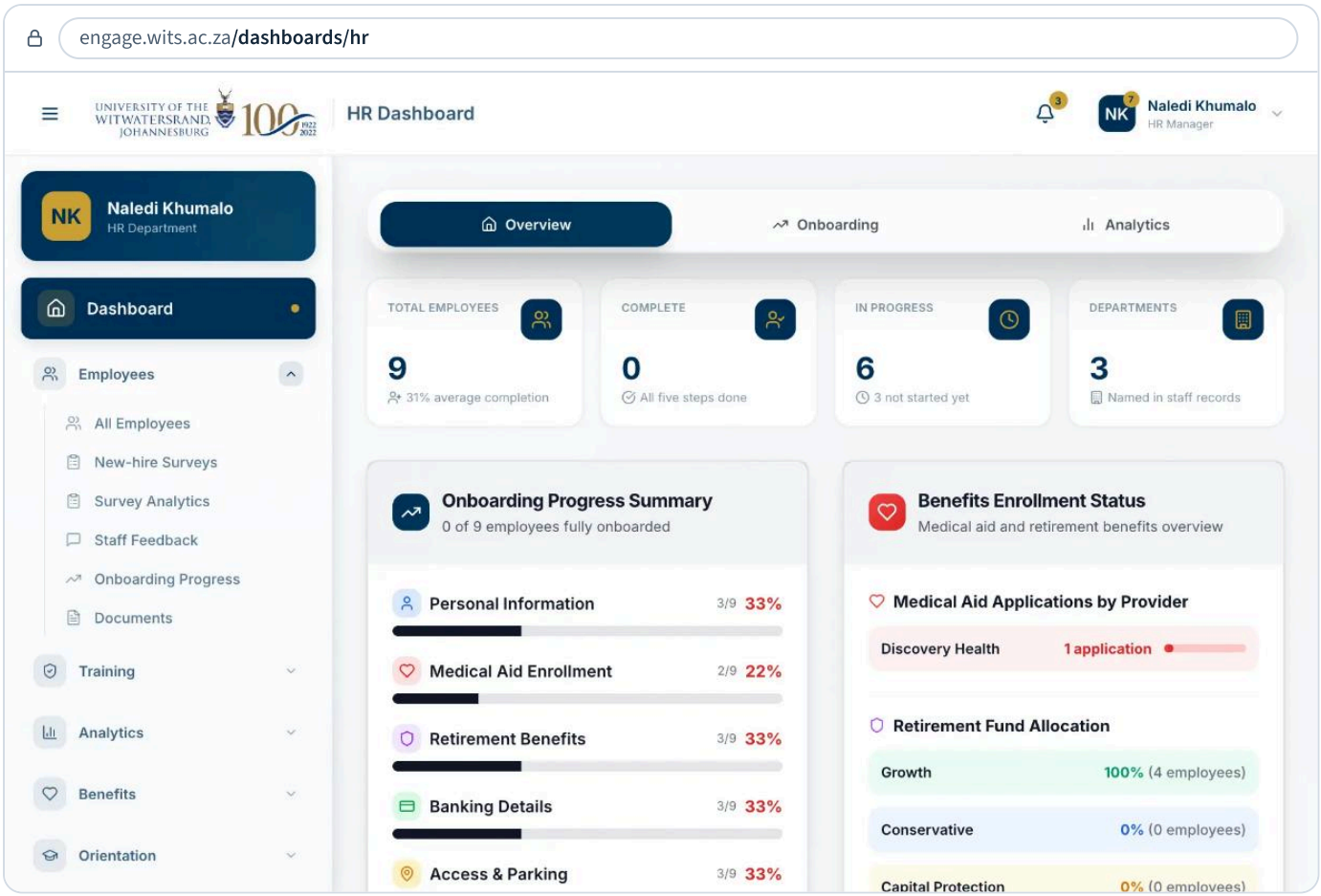
For HR · **Dashboard** in the menu

The HR dashboard brings together staff records, onboarding, policies, surveys and access. It opens to anyone who holds the HR role.

Open the HR dashboard

1. Select your name at the top right of any page.
2. Under **Switch Dashboard**, select **HR Dashboard**.

The menu on the left has HR's seven groups: **Employees**, **Training**, **Analytics**, **Benefits**, **Orientation**, **Policies** and **Administration**. Below them, under the heading **Learning & Development**, are the staff development groups (see Look in on staff development). Select a group to open it.



The Overview tab. Onboarding Progress Summary shows how many staff have finished each onboarding step; Overall Completion is the average progress through the five steps, across all staff.

The four counts across the top add up the staff in Engage:

- **Total Employees**: everyone, with their average progress through the five onboarding steps.
- **Complete**: staff who have done all five steps.
- **In Progress**: staff who have done at least one step but not all five. The line under it counts those who have not started.
- **Departments**: the departments named in staff records, counted the same way as on All Employees.

Beside it, **Benefits Enrollment Status** has **Medical Aid Applications by Provider**: the number of medical aid applications to each provider. It counts applications at any stage, including drafts and rejected ones, so it is not the number of staff who have joined. Under **Retirement Fund Allocation** are the four investment profiles staff choose from when they set up their retirement fund: **Growth**, **Conservative**, **Capital Protection** and **Shariah**. Each shows the share, and the number, of the staff who have chosen a profile. Until someone chooses one, it says “No retirement fund allocations yet”.

The **Onboarding** tab shows the same progress for each person, and the **Analytics** tab shows it step by step, with the same four profiles.

GOOD TO KNOW

If a list is cut off on the right, select ≡ at the top left to fold the menu away. The same groups then run across the top of the page, and the list gets the full width. Select ≡ again to bring the menu back.

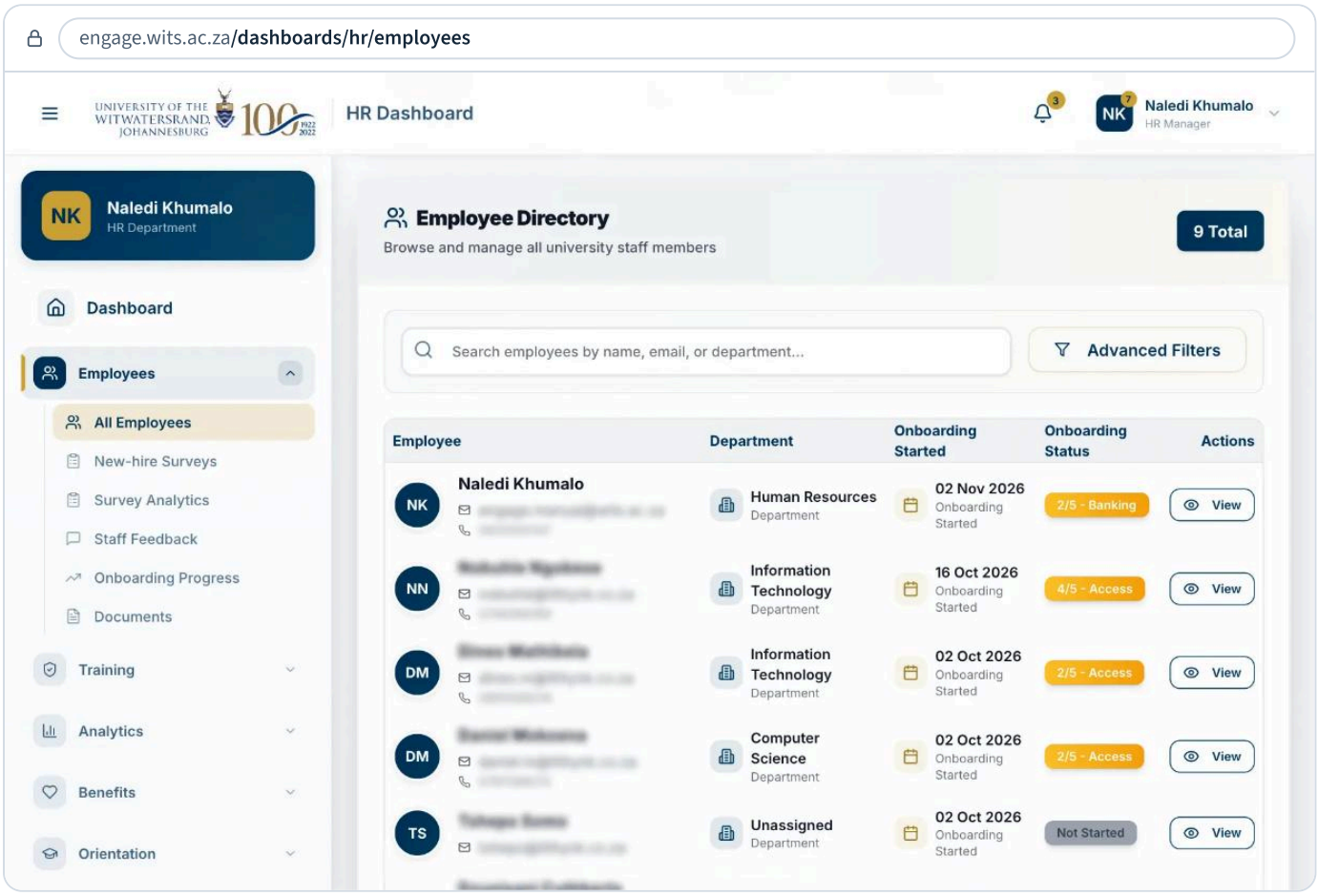
Staff records

For HR · **Employees** › **All Employees** in the menu

All Employees lists every member of staff who has opened their onboarding in Engage. From here you open a staff member's full record.

Find a staff member and open their record

1. Open **Employees** › **All Employees**.
2. Type part of a name, an email address or a department in the search box. The list narrows as you type.
3. To narrow it further, select **Advanced Filters** and choose a **Department** or an **Onboarding Status**. Select **Clear** to remove the filters.
4. Select **View** on the person's line.



Each line shows the person's department, when their onboarding started and where it stands. View opens their record.

Onboarding Started is the day Engage first held a record for the person. It can differ from their first day at Wits, which their record shows as **Started**.

What each onboarding status means

Onboarding has five steps, which new staff complete themselves: their personal profile, medical aid, retirement fund, banking details, and campus access and parking. Part 2 shows these steps from the staff member's side. Three HR screens label the same progress in different words:

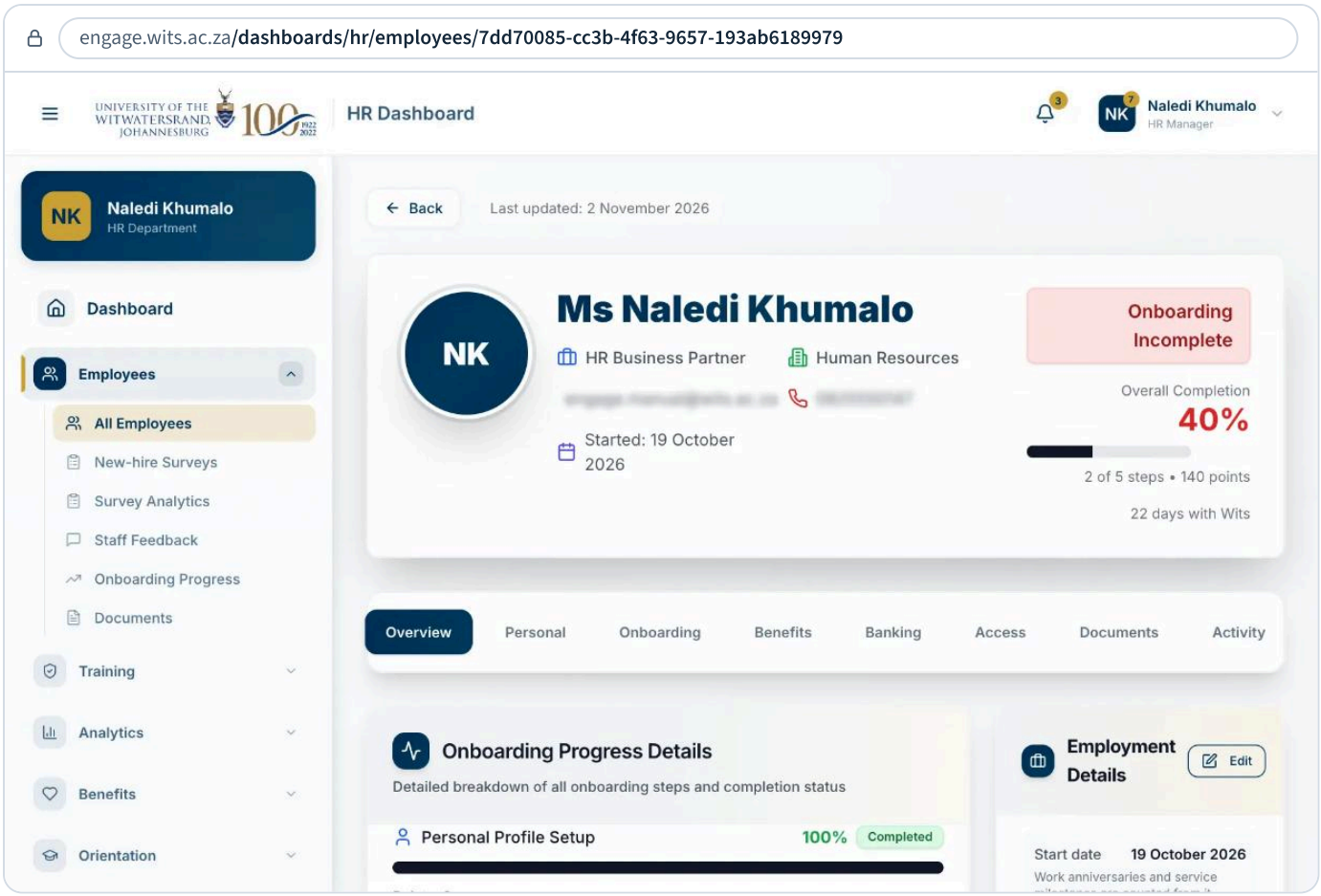
Steps finished	All Employees	Onboarding Progress	The person's record
None	Not Started	Not Started, with “Needs attention”	Onboarding Incomplete
1 of 5	1/5 and the step they are on, for example “1/5 - Access”	Getting Started	Onboarding Incomplete
2 of 5	2/5 and the step they are on	In Progress	Onboarding Incomplete
3 of 5	3/5 and the step they are on	Making Progress	Onboarding in Progress
4 of 5	4/5 and the step they are on	Almost Done	Onboarding in Progress
All 5	Completed	No longer listed	Active Employee

In All Employees, the word after the number is the step the person is on now: Profile, Medical Aid, Retirement, Banking or Access.

Read a staff member's record

The record opens with the person's name, position, department, start date and onboarding progress. The tabs below it hold the detail:

- **Overview**: each onboarding step with its progress, the start date and employee number under **Employment Details**, and key facts such as employment status.
- **Personal**: personal details, contact details, addresses, next of kin and dependants.
- **Onboarding**: a timeline of the steps, a progress summary and the next steps.
- **Benefits**: their medical aid application, with its status, provider, plan, dependants and certificate, and their retirement fund enrolment: the RFI (retirement funding income: the share of salary contributions are worked out on) they chose, their investment profile, pension elections and beneficiaries, and the retirement team's decision.
- **Banking**: the salary account they gave.
- **Access**: campus access card, parking (whether a permit was requested and issued, with its number), building access and library access.
- **Documents**: everything they uploaded. Select **View** to open a document.
- **Activity**: recognitions, document uploads and onboarding milestones.



The top of a record. The badge on the right and the steps count show how far onboarding has gone; the tabs hold the rest.

The record is for reading, apart from the start date and employee number, which HR keeps (below). Staff keep their own details up to date, and the benefits, banking and campus access teams decide on what they submit (Part 8). Select **Back** to return to the page you came from.

Set a staff member's start date or employee number

1. Open the person's record. Under **Employment Details** on the **Overview** tab, select **Edit**.
2. Choose the **Start date**: the person's first day at Wits.
3. Type the **Employee number** if you have it. It can hold letters, digits, dashes and slashes.
4. Select **Save**. **Cancel** leaves both as they were.

Work anniversaries and service milestones are counted from the start date. Once it is set, the person's work anniversaries appear on **Recognition** › **Milestones**, for them and their colleagues, from a year after it. The record's header then reads **Started** with the date, instead of **Start date not recorded**. The change is recorded with your name in the back office's audit trail.

GOOD TO KNOW

You cannot change these on your own record; ask another HR colleague. Two staff members cannot share an employee number.

GOOD TO KNOW

Each time you open someone's record, Engage notes who opened whose record and when. The back office can see this on its Record Access page (Part 9).

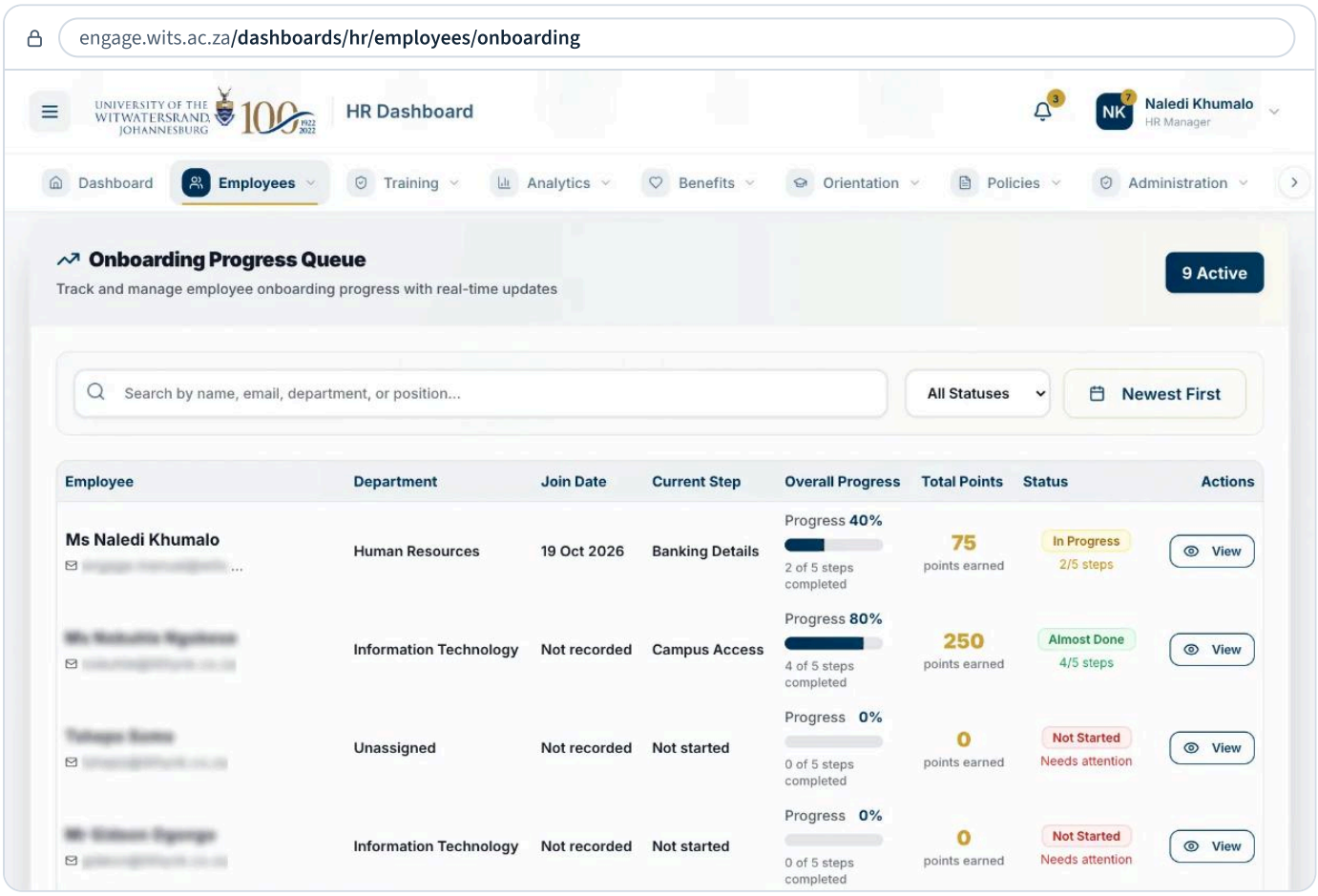
New starters' onboarding

For HR · **Employees** › **Onboarding Progress** and **Employees** › **Documents** in the menu

Onboarding Progress lists only the people who have not yet finished all five steps. Documents lists every document staff have uploaded during onboarding, and is where you review personal and other documents.

Follow a new starter's onboarding

1. Open **Employees** › **Onboarding Progress**.
2. Search by name, email or department, or choose **Not Started**, **In Progress** or **Almost Done** in the status list. **Newest First** switches to **Oldest First**, sorted by join date.
3. Read the person's line: **Current Step** is the step they are on, or **Not started**; **Overall Progress** says how many of the five steps are done, and **Status** sums it up.
4. Select **View** to open their record. Its **Onboarding** tab shows each step.



The queue. Overall Progress and Status show where each new starter stands.

Below the list, **Onboarding Steps Breakdown** counts how many people are on each step, and **Onboarding by Department** counts them by department. **Join Date** is the person's start date, or the day Engage first held their record if no start date is recorded.

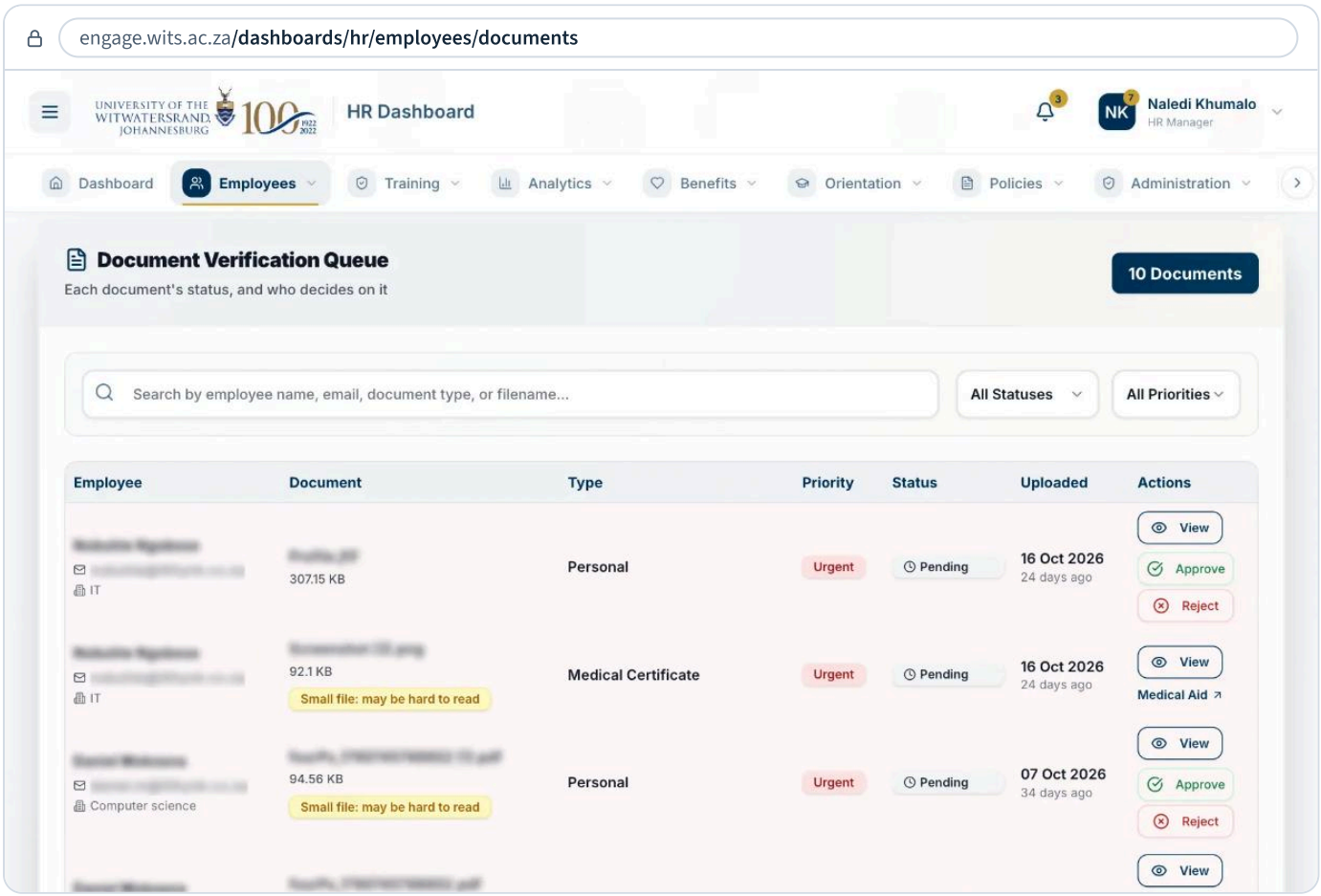
To take the list away, select **Export Report**. It saves the list as you have filtered it as a spreadsheet file (.csv) that opens in Excel, with each person's progress on every step.

TAKE CARE

The exported file holds staff names and email addresses. Store and share it as you would any staff record.

Check a new starter's documents

1. Open **Employees** › **Documents**.
2. Search by name, email, document type or file name, or choose a status or priority in the two lists beside the search box.
3. Select **View** to open a document. It opens in a preview, which has its own download button.
4. To see the document where it is decided, select the team named at the end of its line: **Banking**, **Medical Aid**, **Campus Access** or **Retirement**. The link opens that team's dashboard if you hold its role.
5. A personal or other document has **Approve** and **Reject** at the end of its line instead. View it first, then select one. **Reject** asks for the reason first: say what is wrong and what to send instead, then select **Reject document**.



The last column names the team that decides on each document, or holds Approve and Reject for the ones you decide. File names are blurred in this picture.

Banking, medical aid, campus access and retirement documents are decided by the team that owns them, and their status here changes when that team decides: `Pending`, `Under Review`, `Approved`, or `Rejected` (the staff member replaces it with a new copy). Personal and other documents are yours to decide. When you approve or reject one, the staff member is told. Your reason for a rejection appears beside the document on their My Documents, and in their notification. The line then reads `Reviewed by HR`. A decision cannot be changed afterwards, and you cannot decide on your own documents.

- **Priority** shows how long a document has waited for a decision: `Medium` at first, `High` after three days and `Urgent` after seven. Identity documents and proof of banking start at High. Once a document is approved or rejected, it is `Low`.
- **Tags under the file name** say what to look out for: `Small file: may be hard to read` (yellow), `Not a PDF, JPEG or PNG` (red) or `Large file: may be slow to open` (blue).
- **A line tinted red** needs attention: the file is not a PDF, JPEG or PNG, or it has waited more than three days for a decision.

Add an employee or invite someone

For HR · **Employees** › **All Employees** and **Administration** › **Invitations** in the menu

Staff do not need an invitation to use Engage. Anyone with a Wits Microsoft account can sign in, and Engage gives them the Employee role. An invitation welcomes a new member of staff by email, and can bring one of the specialist roles below with it.

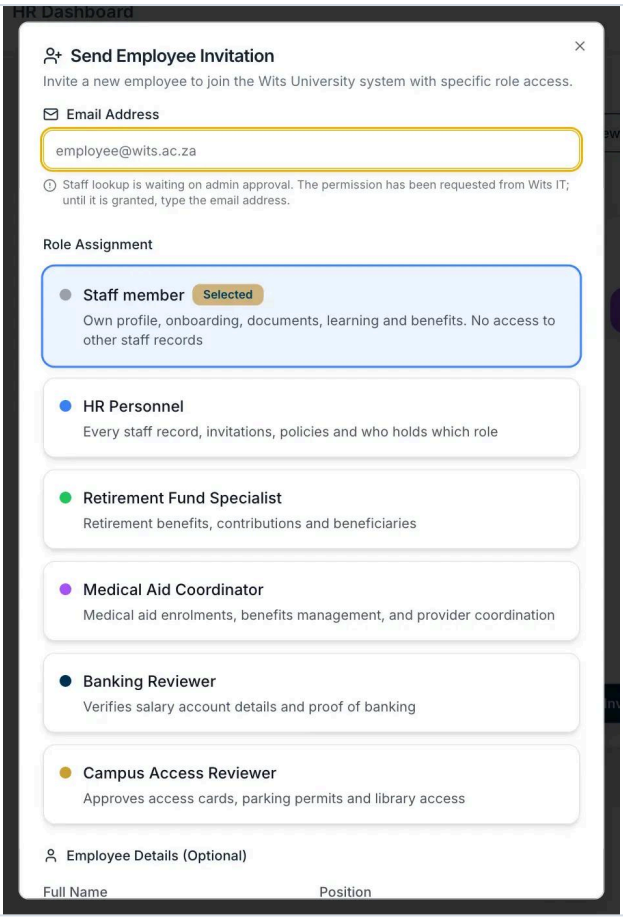
Add an employee

`Add Employee` does not create a staff record. It opens `Add New Employee`, which explains the three steps and sends an invitation. The record itself is created when the person signs in and starts onboarding.

1. Open **Employees** › **All Employees** and select `Add Employee`.
2. Select `Send Invitation`, then follow the steps in the next section from step 2.

Invite someone to Engage

1. Open **Administration** › **Invitations** and select `Send Invitation`.
2. Type the person's Wits email address under `Email Address`. While the form says staff lookup is waiting on approval, you must type the address in full.
3. Under `Role Assignment`, leave `Staff member` selected for an ordinary member of staff, or select the specialist role the person should have.
4. If you like, fill in `Full Name`, `Position` and `Department` under `Employee Details (Optional)`. They appear in the invitation email.
5. Check the `Invitation Preview` at the foot of the form, then select `Send Invitation`. Select `Cancel` to close the form without sending.



Staff member is selected when the form opens. Choose a specialist role only if the person needs it.

TAKE CARE

Sending emails the person at once and cannot be undone; you can only cancel the invitation afterwards.

What the person sees: an email from Wits with a link that works for seven days. The link opens a page where they confirm their full name and select **Create Profile & Continue to Microsoft Sign-In**. They then sign in with their Wits Microsoft account; they set no password.

The role you chose is given at that first sign-in, the same way as on Roles & Permissions:

- **HR Personnel**, **Medical Aid Coordinator**, **Retirement Fund Specialist**, **Banking Reviewer** and **Campus Access Reviewer** need a platform administrator's approval, asked for in your name. Until an administrator who is not involved approves it, the person uses Engage as a staff member. The form and the email both say so.

On your side, the invitation moves from **Pending** to **Accepted** in **Administration › Invitations**, and the line under its status says what became of the role, for example **Role given at first sign-in** or **Signed in. The role waits for an administrator's approval**.

GOOD TO KNOW

An invitation works only for someone who has never signed in to Engage. If the person already uses Engage, the form says so and sends nothing: give them the role on Roles & Permissions (below).

Resend, copy or cancel an invitation

1. Open **Administration** › **Invitations** and find the invitation under **Invitation Management**. Search, or choose a status (**Pending**, **Accepted**, **Expired**, **Cancelled**) or a role.
2. Select the button at the end of its line.
3. Select **Resend Email** to send a pending invitation's email again. It carries the same link, and the invitation still expires on the same day.
4. Select **Copy Link** to copy the invitation link, for example to send it yourself if the email did not arrive.
5. Or select **Cancel**, then **Cancel Invitation** to confirm. Select **Keep Invitation** to change your mind.

A cancelled invitation's link stops working, and cancelling cannot be undone. To invite the person again, send a new invitation. The list fills as invitations are sent.

Roles and access

For HR · **Administration** › **Roles & Permissions** in the menu

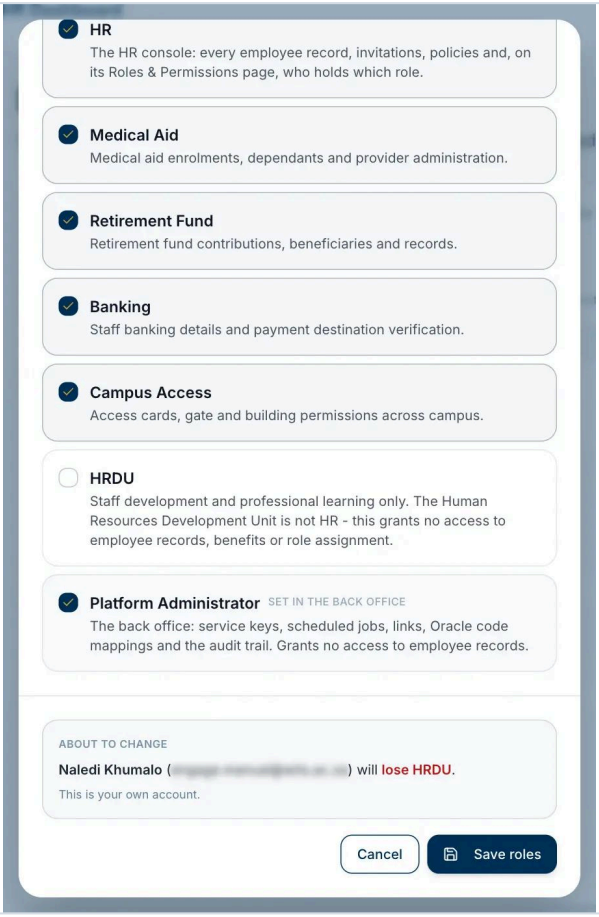
A role decides which dashboards a person can open. Roles add up, and everyone keeps Employee. The page lists everyone who has signed in to Engage at least once.

Role	What it opens	Giving it
Employee	Their own profile, documents, leave and benefits	Everyone has it; it cannot be removed
HR	This HR dashboard: every staff record, invitations, policies, and this page	Needs a platform administrator's approval
Medical Aid	Medical aid applications, dependants and providers (Part 8)	Needs approval
Retirement Fund	Retirement fund contributions, beneficiaries and records (Part 8)	Needs approval
Banking	Staff banking details and their verification (Part 8)	Needs approval
Campus Access	Access cards, gate and building permissions (Part 8)	Needs approval
HRDU	Staff development only, with no access to staff records, benefits or roles (Parts 6 and 7)	Applies at once
Platform Administrator	The back office, with no access to staff records (Part 9)	Only in the back office; HR cannot change it

Give or remove a role

1. Open **Administration** › **Roles & Permissions**.
2. Under **Everyone**, search by name, email, department or role.
3. Select **Edit roles** on the person's line.

4. Tick a role to give it, or untick it to remove it. **About to change** says exactly what will happen.
5. Select **Save roles**. If you are giving HR, Medical Aid, Retirement Fund, Banking or Campus Access, write the reason under **Why is this access needed?**, and the button reads **Ask for approval** instead.



Unticking a role. About to change spells out the result before anything is saved; Cancel leaves the person's roles as they were.

What happens next:

- A removal, or a grant of HRDU, applies at once. The person sees the change the next time they open a page.
- A grant that needs approval goes to the platform administrators. It applies only when one who is not involved approves it. If there is no such administrator, it applies at once and the back office is alerted.
- The person is not sent a message either way. Every change is recorded with your name in the back office's audit trail.

TAKE CARE

You cannot remove your own HR role: this page is the only way to give it back. Ask another HR colleague to do it.

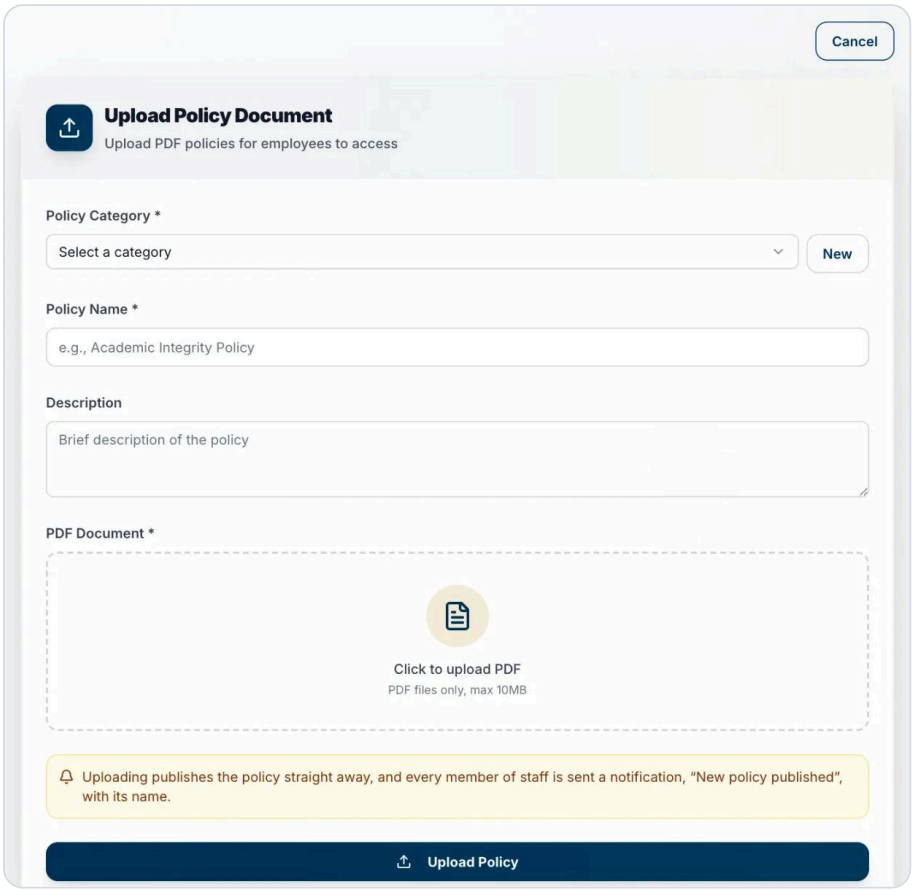
Policies and the Policy Guide

For HR · **Policies** › **All Policies** in the menu

All Policies is the library of Wits HR policy documents that staff read. The Policy Guide gives staff short, plain-English answers drawn from those documents, and HR keeps the answers right.

Add a policy

1. Open **Policies** › **All Policies** and select **Upload New Policy**.
2. Choose the **Policy Category**. To add a category, select **New**, type its name and select **Create**; it is saved at once.
3. Type the **Policy Name** as staff should see it, and a short **Description**.
4. Select **Click to upload PDF** and choose the file: a PDF of 10 MB at most.
5. Select **Upload Policy**. To stop instead, select **Cancel** at the top right.



The upload form. Fields marked * are required.

The policy appears in the library at once, under its category, and every member of staff receives a notification: “New policy published”, with the policy's name. The form says so above the **Upload Policy** button.

TAKE CARE

The notification goes to everyone as soon as you upload, and cannot be recalled. Check the file and the name first.

Replace a policy's document

When a policy is reworded, replace its PDF rather than uploading it again, so the record of who read the earlier version is kept.

1. Open **Policies** › **All Policies** and find the policy. Each card shows its **Version**.
2. Select **Replace PDF** on its card.

3. Choose the new PDF, of 10 MB at most.
4. Select **Replace PDF** in the window. To stop instead, select **Cancel**.

The policy becomes the next version. Every member of staff is sent a notification, “Policy updated”, and anyone who had marked it as read sees **Mark as read** again. Their earlier confirmation is kept as the record that they read the old wording, and so is the old document.

GOOD TO KNOW

The window says how many published Policy Guide answers cite the policy. Those answers keep quoting the old wording until you change them: select **See them**, or **Guide answers** on the card, to open them in the Policy Guide console.

Retire a policy

1. Open **Policies** › **All Policies** and select **Retire** on the policy's card.
2. If Policy Guide answers cite it, leave **Also take those answers off the Policy Guide** ticked to move them to Awaiting review, or untick it to leave them published.
3. Select **Retire policy**. To keep it, select **Keep it**.

Staff stop seeing the policy straight away, and nobody is sent a message. On your list it stays in its category, greyed and marked **Retired**, with the record of who read it. To bring it back, select **Restore** on its card. Answers you took off the guide stay in Awaiting review until you approve them again.

GOOD TO KNOW

A policy is never deleted, because that would also delete the record of who read it.

Ask staff to read a policy again

Staff confirm they have read a policy with **Mark as read**. When a policy's wording has changed, you can ask them all to confirm again.

1. Open **Governance & Policy** › **Policy Governance**, under **Learning & Development** in the menu. It starts with the policies on staff development only; select the button that ends **show all** to list every policy.
2. Find the policy under **Policies and acknowledgement**.
3. Select **Revise** under its version number.

The version number goes up by one, every member of staff is sent a notification, “Policy updated”, and everyone who had read the policy is asked to read it again. Their earlier confirmation is kept as the record that they read the old wording. Revise does not change the document itself: to give staff new wording, use Replace PDF instead.

TAKE CARE

Revise takes effect as soon as you select it, with no question first, and it cannot be undone.

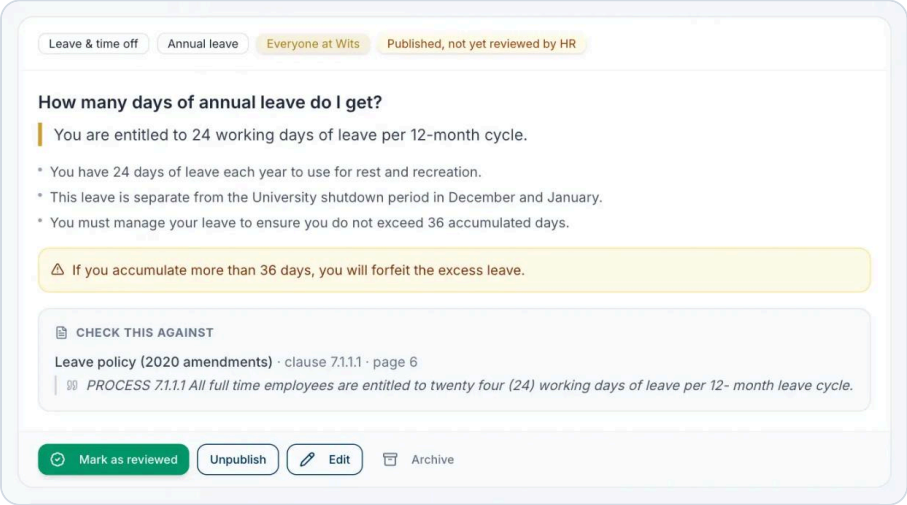
Keep the Policy Guide's answers right

Staff open the Policy Guide from their Policies page and type a question in their own words. The guide matches it to a question HR has already answered and shows that answer: the short answer, what it means, what to do, what to watch out for, and the policy and clause it comes from. The same question always gets the same answer. When nothing matches, the guide says so and keeps the question for you. An answer can be marked for a group of staff, such as academic or PAS (professional, administrative and support) staff, or for everyone at Wits. Answers that do not apply to the reader are set aside and labelled, not hidden.

Staff see only published answers. New answers are prepared from the policy documents and arrive in the review queue, and nothing new reaches staff until someone in HR approves it. Many answers were published in one go when the guide was set up, before anyone in HR had checked them; each answer's tag says which kind it is.

Tag	What it means
Reviewed by HR, with a date	Someone in HR approved this answer, and their name is recorded against it.
Published, not yet reviewed by HR	Staff can see it, but nobody in HR has checked it yet.
Not yet reviewed	Staff cannot see it: it is waiting for you, or was archived.
Edited in the console, with a date	Someone in HR changed its wording here.

1. Open **Policies** › **All Policies** and select **Policy Guide console**.
2. On **Review queue**, select **Awaiting review**. **Published**, **Archived** and **All** hold the rest. Under **Published**, tick **Only those not yet reviewed** to see the answers still to check.
3. Read the answer, then compare it with **Check this against**: the policy, the clause, the page and the exact words quoted from it.
4. If it is right, select **Approve & publish**, or **Mark as reviewed** on an answer that is already published. If it is wrong or no longer applies, select **Archive**.



One answer in the console. Check this against quotes the clause the answer relies on, so you can check it without opening the policy.

- **Approve & publish**: staff can see the answer straight away. An answer that cites no policy says so in red and cannot be published.

- **Mark as reviewed** records that you have checked a published answer. Staff see no difference.
- **Unpublish** takes an answer back to Awaiting review; **Archive** moves it to Archived. Either way staff no longer see it, and you can publish it again later.
- A red number on an answer counts the staff who marked it unhelpful.

Correct an answer

1. Select **Edit** on the answer in the Policy Guide console.
2. Change any part of it: the **Question**, **The short answer**, **What it means**, **What to do** and **Watch out** (one point a line), and who it **Applies to**. Tick none of the staff groups for an answer that is true for everyone at Wits.
3. Under **Citation**, choose the policy, and type the clause, the page and the exact words from the policy. **Add a citation** adds another; the bin removes one. Every answer needs at least one.
4. Select **Save changes**, or **Cancel** to leave it as it was.

On a published answer, staff see your changes as soon as you save them; the console reminds you of this above the form. Your changes are kept when the guide's content is next loaded.

Find the answers that cite a policy

In the Policy Guide console, choose the policy under **Cites policy**. The list, and the counts on each tab, now cover only answers that cite it; **All** shows every one of them, whatever its status. **Guide answers** on a policy's card in **Policies › All Policies** opens the same list. Select **Show all policies** to go back.

> **GOOD TO KNOW**
> When a policy changes, answers that quote its old wording do not change with it. Open its answers this way and edit, unpublish or archive them. A citation of a retired policy is marked **Policy retired**.

See what staff are asking

Select **What staff are asking** in the Policy Guide console. **Answer rate** is the share of staff searches in the last 90 days that found an answer, and is the best single measure of whether the guide is doing its job. **Searches** counts them and **Came up empty** counts those that found nothing.

Write these next lists the questions that found nothing, most asked first. **Answers staff marked unhelpful** lists answers that exist but are not helping. Use both lists to decide which answers to prepare or improve next.

Write an answer for a question staff asked

1. Under **Write these next**, select **Write an answer** beside the question.
2. Choose the **Topic** staff will find it under. The **Question** starts as the staff member typed it; reword it as a clear question.
3. Write **The short answer** and, if you like, the other parts, as when you correct an answer.
4. Fill in the **Citation**: the policy, the clause, the page and the exact words.
5. Select **Save for review**.

The question leaves **Write these next**, and the new answer waits under **Awaiting review** on the Review queue. Staff see it once someone approves it there with **Approve & publish**.

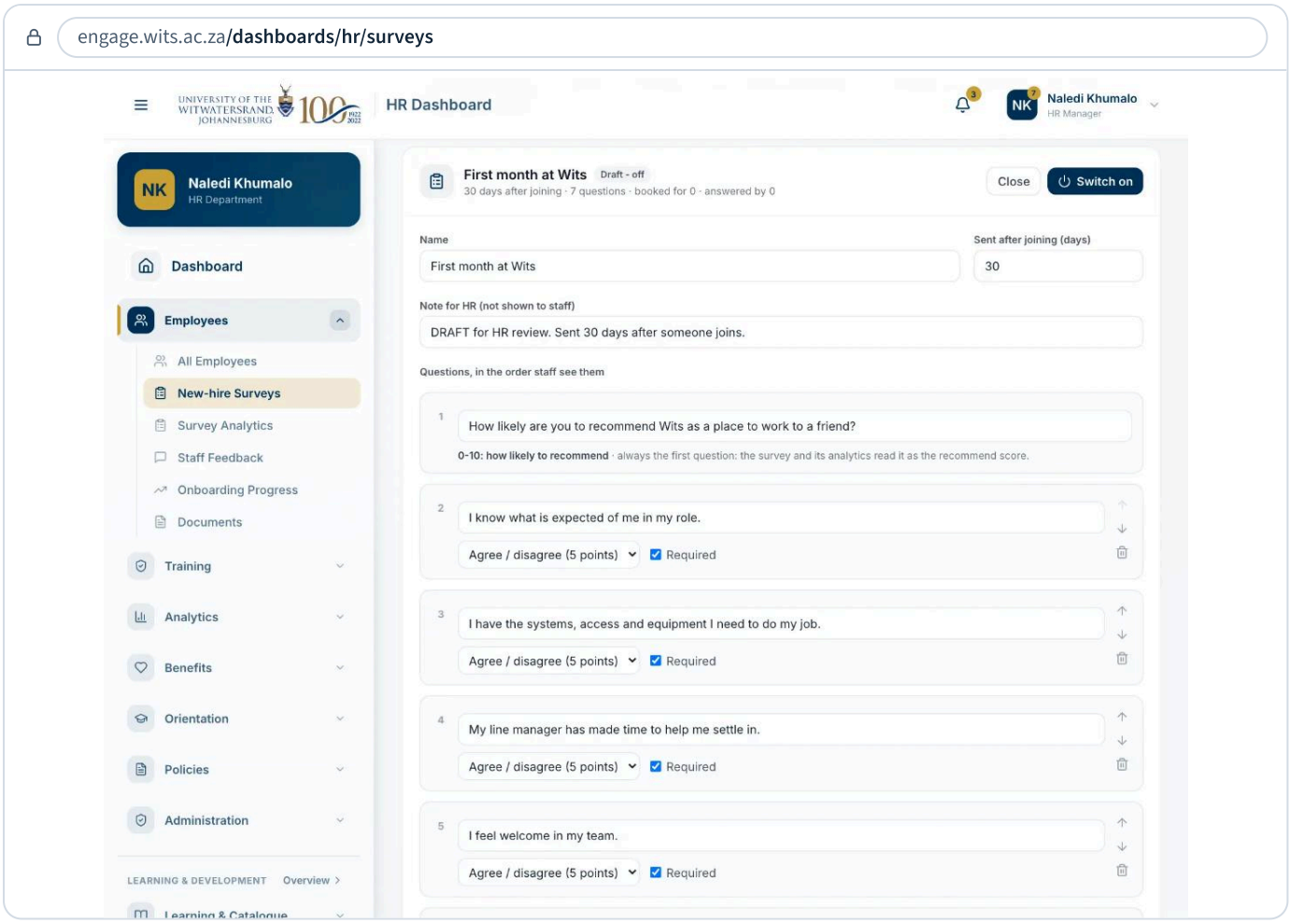
Surveys and staff feedback

For HR · **Employees** › **New-hire Surveys**, **Survey Analytics** and **Staff Feedback** in the menu

New staff are asked short surveys 30, 60 and 90 days after joining, and any member of staff can send HR feedback. These pages set up the surveys, show their results and let you answer feedback.

Review and switch on a new-hire survey

1. Open **Employees** › **New-hire Surveys**. There are three: **First month at Wits**, **Two months at Wits** and **Three months at Wits**. Each shows **Draft - off** until it is switched on.
2. Select **Review and edit** on a survey.
3. Change the **Name**, the day it is sent under **Sent after joining (days)**, or the **Note for HR (not shown to staff)**.
4. Reword any question. From the second question on, choose **Agree / disagree (5 points)** or **Written answer**, tick **Required** or not, and use the arrows to move a question or the bin to remove it. **Add a question** adds one, up to 15.
5. Select **Save changes**.
6. When the wording is ready, select **Switch on**, then **Switch on** again to confirm.



A survey open for editing. The first question is always the 0 to 10 “would you recommend Wits” question, which Survey Analytics scores.

Once a survey is on, it is booked for every member of staff whose day is still ahead, counted from their start date (or their first sign-in if no start date is recorded). It appears on their Surveys page on that day (Part 4). When the back office's reminder emails are running, staff are also emailed on the day and reminded two days before it is due. Staff who joined long ago are not given it late.

TAKE CARE

Switching on reaches staff, and they will see the questions exactly as written. Changes made after people have answered apply to later answers only. **Switch off** works at once with no question first: it stops new bookings, but surveys already booked stay with the people they were booked for.

Read survey results

Open **Employees** › **Survey Analytics**. Until staff answer, **Net Promoter Score** says “No responses yet” and the rest of the page shows zeros and “No milestone data yet”.

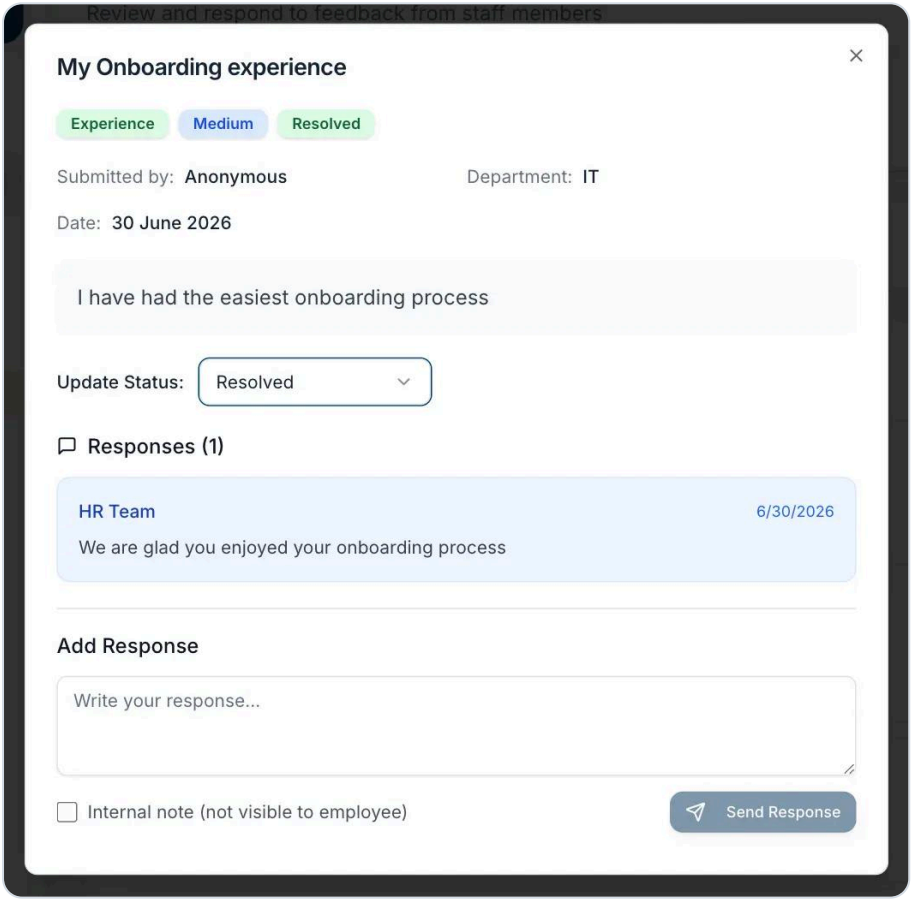
- **Net Promoter Score** comes from the first question. People who answer 9 or 10 are **Promoters**, 7 or 8 are **Passives**, and 0 to 6 are **Detractors**. The score is the percentage of promoters minus the percentage of detractors, so it runs from −100 to 100.
- **Response Rate** is answered surveys as a share of surveys booked. **Performance by Milestone** compares the 30, 60 and 90-day surveys, and **Department Comparison** compares departments.

- **Recent Concerns** lists concerns written by staff who did not answer anonymously.

To close a concern, select **Address**, describe what was done under **Action Taken**, and select **Mark as Addressed**. Your note is kept with the answer and the concern turns green. The staff member is not sent a message.

Read and answer staff feedback

1. Open **Employees** › **Staff Feedback**. Narrow the list with the status, category and priority lists if you need to.
2. Select **View** on an item.
3. Change **Update Status** as you work on it: **New**, **Under Review**, **In Progress**, **Resolved** or **Closed**. The change is saved at once.
4. To reply, write under **Add Response** and select **Send Response**. To leave a note for HR only, tick **Internal note (not visible to employee)** first; the button then reads **Add Note**.



An anonymous item with one reply already sent. Tick Internal note before you write anything meant for HR only.

When you select **Send Response**, the staff member gets a notification, “HR responded to your feedback”, and reads your reply on their own Feedback page. This works for anonymous feedback too, though you still do not see who sent it. A reply cannot be edited or taken back once sent. Internal notes and status changes are not sent to the staff member.

Compliance, benefits and analytics

For HR · **Training**, **Benefits**, **Analytics** and **Learning & Development** in the menu

These pages give HR the overall picture. You read them; the work they show is done by staff and by the teams that own each area.

Check mandatory training compliance

Open **Training › Compliance Dashboard**. Each training marked mandatory is assigned to every new staff member automatically, due 30 days after Engage first holds their record. The page fills as that happens. While nothing is assigned, **Overall Compliance** shows a dash with "No mandatory training assigned yet", and the two charts say there is nothing to show yet.

- The counts across the top: **Overall Compliance**, **Completed**, **In Progress**, **Overdue** and **Due Soon** (within 7 days). A training counts as overdue from the day after its due date.
- **Overdue Compliance Trainings** and **Due Within 7 Days** list each person, the training, the law it answers to and the due date. **Reminders** counts the reminders Engage has already sent.
- **Department Compliance Statistics** has a line for each department, however its name was typed ("it" and "IT" are one department). **Staff Assigned** counts the people there with mandatory training; **Compliant** counts those who have finished all of theirs. Each department is rated **Excellent** at 95% or more, **Good** from 80%, and **At Risk** below 80%. A department with nothing assigned shows a dash and **Nothing assigned**. The **At risk** and **Excellent** buttons narrow the list.

Send Reminder on a person's line opens a ready-written email to them in your own email program. Nothing is sent until you send it there.

Choose which trainings are mandatory

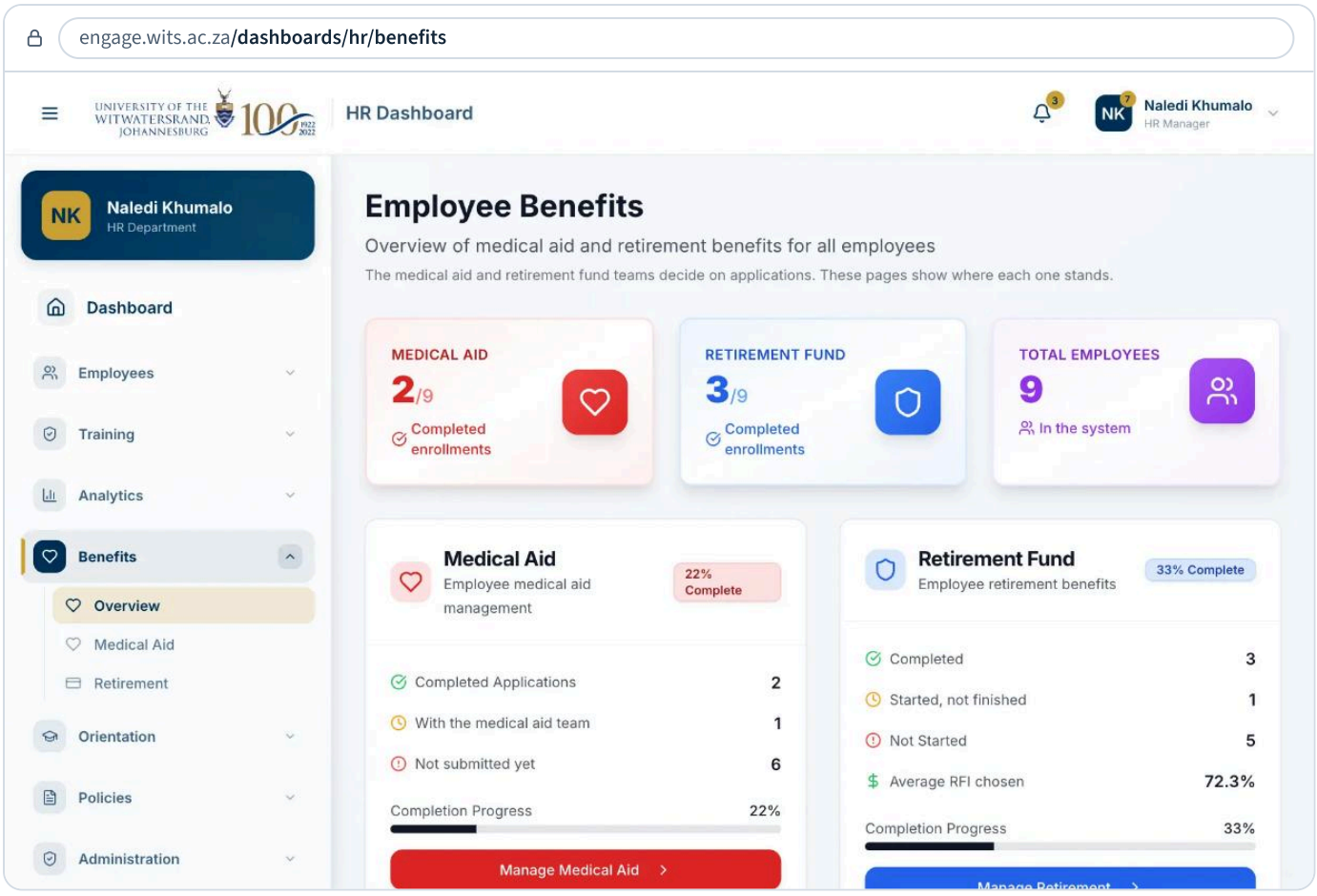
At the foot of the Compliance Dashboard, **Mandatory Trainings** lists the compliance trainings. Switch **Mandatory** on or off beside a training; the change is saved at once.

- A mandatory training is given to each new member of staff it applies to, from then on. Staff who already have it keep it, and switching it on does not give it to staff who joined earlier.
- Each new member of staff is sent a notification, "New compliance training assigned", with the due date.
- A training marked **Not in use** is not given to anyone, whatever its switch says.

The list says "No compliance trainings have been set up yet" until trainings are added.

See who has enrolled for benefits

Open **Benefits › Overview**. It counts completed medical aid and retirement fund enrolments against the number of staff. The three lines on the Retirement Fund card add up to all staff. On the Medical Aid card, rejected and cancelled applications are in none of the three lines, so while there are any, the three add up to fewer than all staff.



The benefits overview. Manage Medical Aid and Manage Retirement open the two detailed pages.

- **Medical aid.** `Completed Applications` are approved by the medical aid team. `With the medical aid team` are submitted and waiting for their decision. `Not submitted yet` are staff with no application, or one they have not sent.
- **Retirement fund.** `Completed` means the staff member submitted their enrolment and accepted every acknowledgement, the same as their own onboarding step. `Started, not finished` means they began but have not submitted. `Average RFI chosen` is the average RFI (retirement funding income: the share of salary that retirement contributions are worked out on) among staff who have chosen one.
- **Benefits › Retirement** counts enrolments the same way, so its figures match this page.

- **Benefits › Medical Aid** has the tabs `Overview`, `Applications`, `Providers` and `Analytics`. `View Details` on an application opens that person's medical aid application.
- **Benefits › Retirement** has `Overview`, `Applications`, `Allocations` and `Analytics`. `View` opens one person's retirement fund choices; `Back to All Applications` returns to the list.

These pages are for reading. The medical aid and retirement fund teams decide on applications from their own dashboards (Part 8).

Read the general analytics

Open **Analytics › General Analytics** for charts of the whole staff: `Employee Growth Trend`, `Onboarding Activity` (people joining and finishing onboarding each month), `Department Distribution`, `Onboarding Steps`, `Benefits Enrollment` and `Document Statistics`.

- The list at the top right sets how many months the two charts by month cover: `Last 3 Months`, `Last 6 Months`, `Last 12 Months` or `Last 2 Years`. Each month is shown with its year.

- The other figures and charts show where things stand today, so they do not change with the period.
- **Document Statistics** counts every document staff have uploaded, by type, as approved, pending or rejected. A document replaced by a newer upload is left out, as it is on **Employees** › **Documents**, so the two totals match.

Look in on staff development

Under the heading **Learning & Development**, at the foot of the menu, HR has most of the staff development screens that the Human Resources Development Unit (HRDU) works in, in the same groups as HRDU's menu, so that HR can see what is happening. **Overview**, beside the heading, gives the headline figures. Parts 6 and 7 explain each screen. **Governance & Policy** › **Policy Governance**, the last group, shows how many staff have read each policy; it is covered under Ask staff to read a policy again.

Orientation sessions

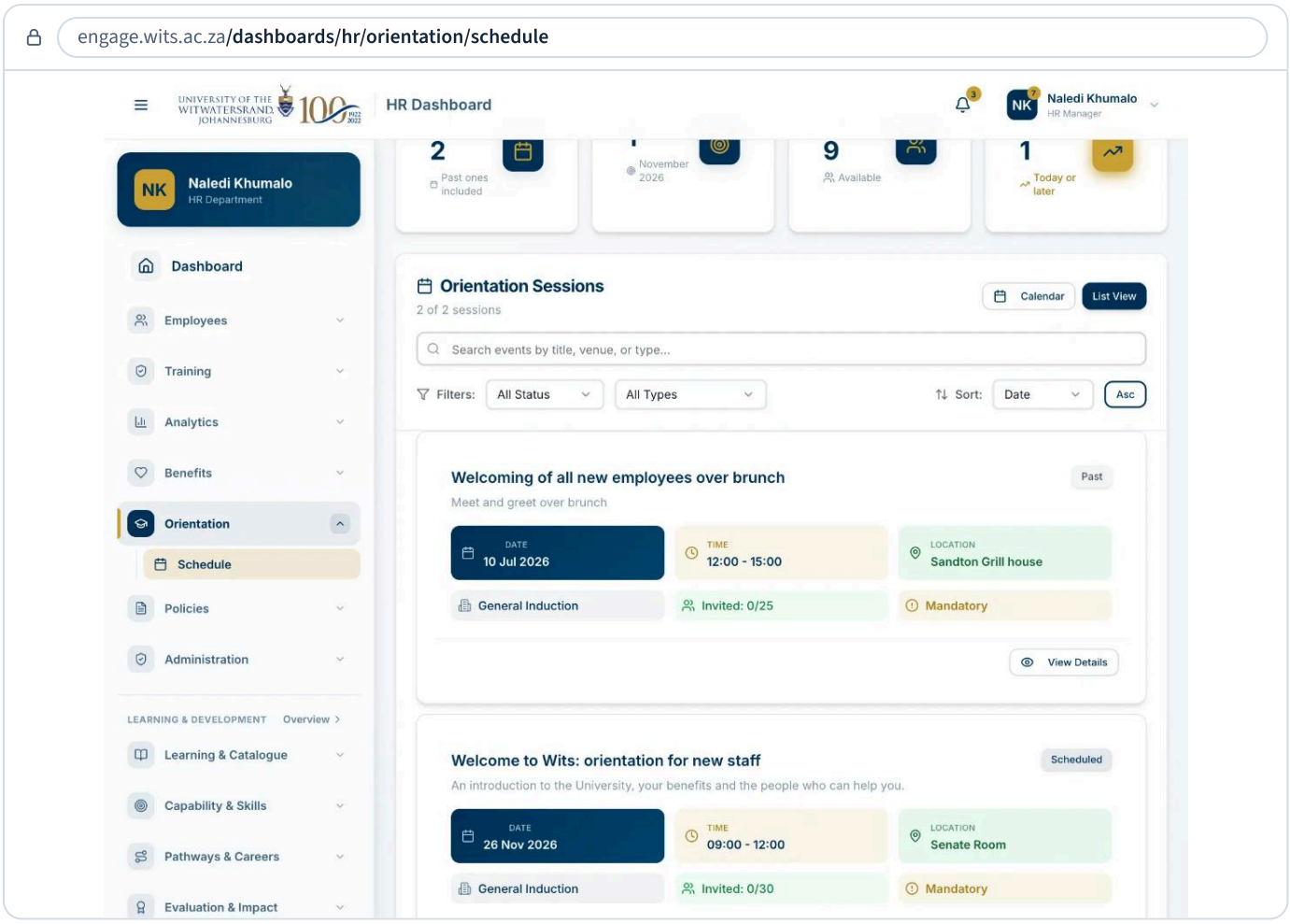
For HR · **Orientation** › **Schedule** in the menu

The schedule holds orientation sessions for new staff, such as a general induction or a campus tour, and sends the invitations to them.

Schedule an orientation session

1. Open **Orientation** › **Schedule** and select **New Event**. On the calendar, you can also select an empty day from today onwards.
2. Fill in **Session Title**, **Session Type**, **Date**, **Start Time** and **End Time**, which are required, and if you like the **Description**, **Venue**, **Room** and **Max Capacity** (25 unless you change it). The end time must be after the start time.
3. Tick **This is a mandatory session for all new employees** if it is.
4. Select **Create Session**.

Creating a session sends nobody anything. It appears on the calendar and under **List View**.



A session in List View. Invited shows how many people are booked against the session's capacity.

Each session carries a tag that shows where it stands:

Tag	What it means
Scheduled	The session is still ahead. You can change it, cancel it and invite people to it.
Today	The session takes place today. You can still change it, cancel it and invite people.
Past	The day has gone. You can open the session to see who was invited, but you cannot change it, cancel it or invite anyone.
Cancelled	The session was called off. It stays on the schedule, greyed out, as the record of who was invited.

Change a session

1. In List View, select Edit on the session. On the calendar, point to the session and select Edit. On the session's own page, Edit is at the top.
2. Change what you need, then select Save Changes.

The capacity cannot be set below the number of people already invited, and the date cannot be moved into the past.

If people are already invited and you change the date, the times or the place, the window adds a tick box, already ticked, to email them the new date, time and place. Leave it ticked and each of them is emailed the new details beside the old ones. Untick it only if you will tell them yourself.

Cancel a session

1. In **List View**, select **Cancel Session** on the session. On the calendar, point to the session and select **Cancel**. On the session's own page, **Cancel Session** is at the top.
2. The window says how many people are invited. To email them that the session is cancelled, leave the tick box ticked.
3. Select **Cancel Session**. To go back without cancelling, select **Keep Session**.

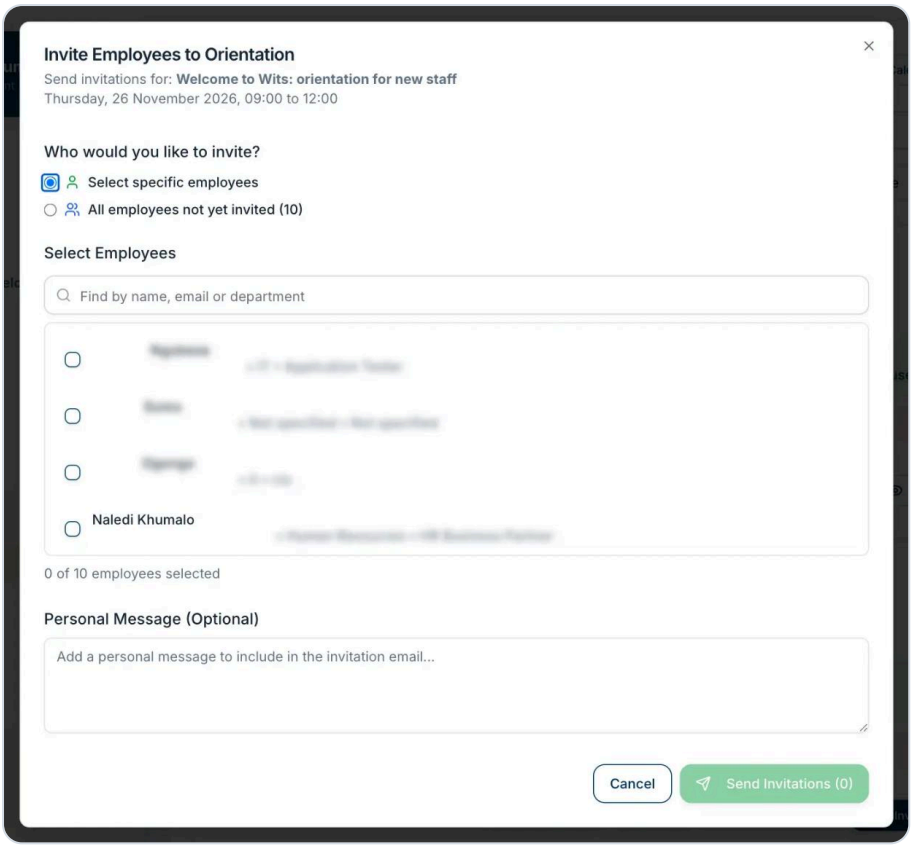
The session stays on the schedule, marked **Cancelled**, and the place of everyone invited is cancelled too. Nobody can be invited to it again.

TAKE CARE

Cancelling cannot be undone. To hold the session after all, schedule a new one and invite people to it again.

Invite staff to a session

1. In **List View**, select **Invite Employees** on the session. On the calendar, select the session itself. A past or cancelled session opens its own page instead, because nobody can be invited to it.
2. Under **Who would you like to invite?**, **Select specific employees** is already chosen. Type in the box above the list to find people by name, email or department, and tick the people you want. To invite everyone who is not yet invited, choose **All employees not yet invited** instead.
3. Add a **Personal Message (Optional)** if you like. It appears at the top of the email.
4. Select **Send Invitations**. The number on the button is how many people will be emailed.



The window opens on choosing people. Everyone not yet invited is one choice away, so check which is chosen before you send.

TAKE CARE

Send Invitations emails every person counted on the button straight away, and the emails cannot be recalled. Check who is chosen first, or select **Cancel**.

Each person invited is emailed the session's details and booked onto it, and the session's **Invited** count goes up. People already invited are not in the list, so nobody is emailed twice. The window then shows **Invites Sent**, **Booked, Not Emailed**, **Skipped** and **Failed**. **Booked, Not Emailed** counts people who now have a place but whose email did not go out: let them know yourself.

On the calendar, point to a session and select **View Details** (**Show Details** for a past or cancelled session) to open its own page, with the people invited and how many places remain.

See who has confirmed

Each invitation email has a **Confirm Attendance** button. It opens a page in Engage that shows the session (someone who is not signed in is asked to sign in first, then brought straight back to it); when the person selects **Confirm Attendance** there, their place is confirmed. Open the session's own page to see it: their line under **Invited Employees** changes from **Pending** to **Confirmed**, and the **Confirmed** count goes up. Nobody can confirm a past or cancelled session, or a place that was cancelled.

Record who attended

1. On the day of the session or after it, open the session's own page: select it on the calendar, or **View Details** in **List View**.

2 Under **Invited Employees**, select **Attended** or **Absent** on each person's line.

Each choice is saved at once, and the person's tag changes to **Attended** or **Absent**. **Capacity Overview** counts both. If you chose wrongly, select the other button. Nobody is sent a message. Before the day, and on a cancelled session or a cancelled place, the buttons are not shown.

Staff development: the daily work

For the Human Resources Development Unit. It covers your home page and the work that lands on HRDU every day: licence requests, training sessions, development plans, bursaries, the SETA returns, and keeping the learning catalogue in order. Part 7 covers the competency framework, careers, evaluation, records and governance.

Your HRDU home

For HRDU · **Switch Dashboard** › **Staff Development** in your user menu

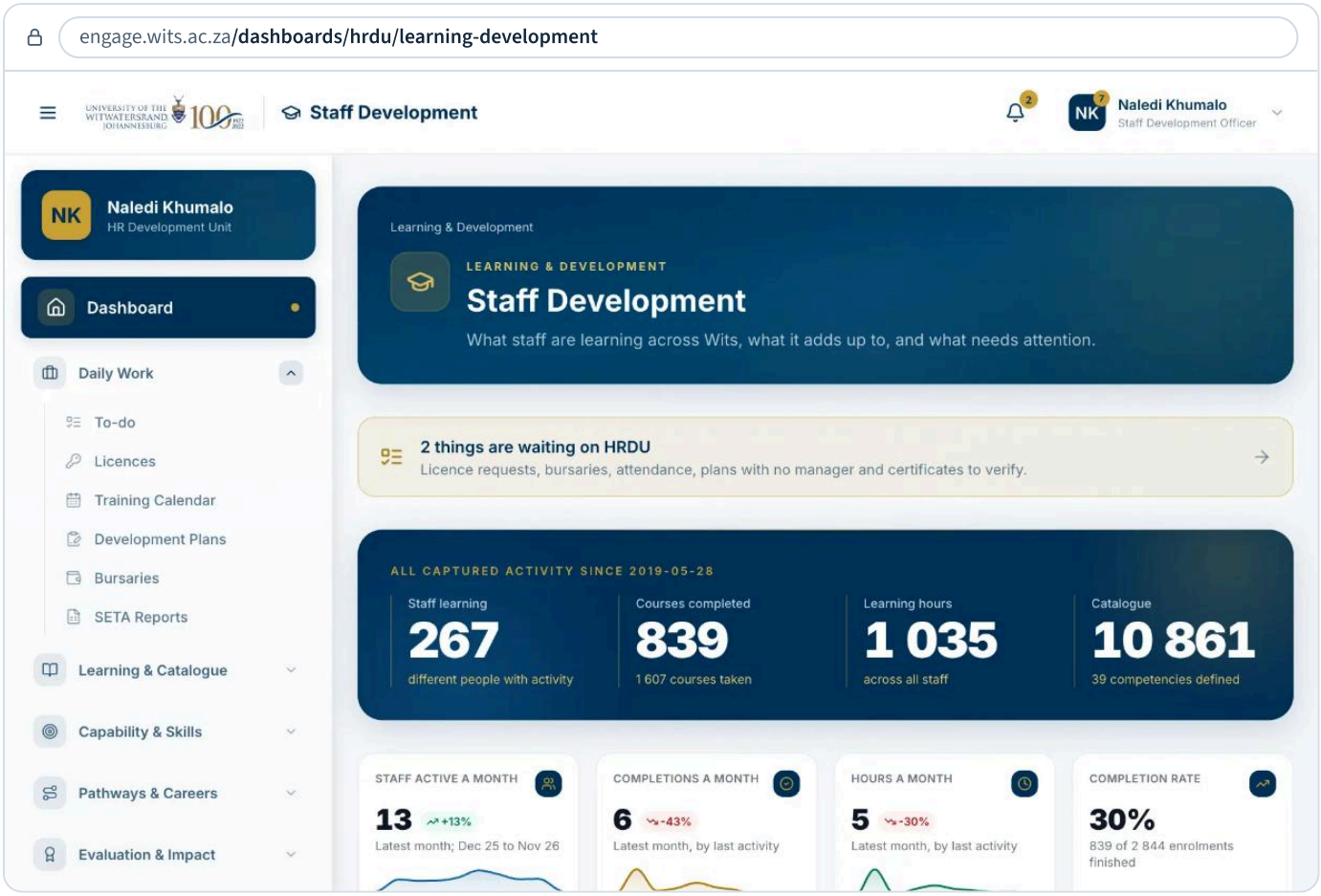
The Staff Development dashboard is where HRDU works. It shows staff development across Wits, not your own learning, and it holds none of HR's employment records.

Open the Staff Development dashboard

1. Select your name at the top right of any page.
2. Under **Switch Dashboard**, select **Staff Development**.

You land on the dashboard home. **Dashboard**, at the top of the sidebar, brings you back to it from anywhere.

See what needs you, and how learning is going



The home page opens with how many things are waiting on HRDU, then the figures for all of Wits.

- **The to-do strip** reads, for example, "3 things are waiting on HRDU". Select it to open the to-do list.
- **The dark band** gives four figures for all captured activity: **Staff learning**, **Courses completed**, **Learning hours** and the size of the **Catalogue**.
- **The four tiles below it** give the latest month's active staff, completions and hours, and the overall completion rate. Four charts follow: staff learning each month, finished or still going, the most-taken courses, and when staff learn.
- **Needs your attention** appears only when there is something to act on: certificates staff have sent for you to verify (**Review** opens them, see Verify a certificate), or a competency that fewer than a quarter of staff reach.
- **Two tabs** sit at the foot of the page. **Activity** shows completions over time, how far staff get through their courses, and the campaigns running. **Skills & courses** lists the skills the most staff have shown and the most-taken courses, each with a search box.

GOOD TO KNOW

A month here is the month a person was last active on a course, so all of a course's hours land in that month. The charts say so in their subtitles.

Find your way around the sidebar

The sidebar groups HRDU's screens into eight sections. It opens one section at a time, and opens the one you are in. To hide the sidebar and show the same menu across the top of the page, select the menu button beside the Wits logo.

Section	What is in it	Where it is explained
Daily Work	To-do, Licences, Training Calendar, Development Plans, Bursaries, SETA Reports	This part
Learning & Catalogue	Learning Hub, Development Directory, Collections	This part
Capability & Skills	Competency Framework, Skills & Analytics, Demand Targets	Part 7
Pathways & Careers	Pathways, Advancement Criteria, Career Progression, Succession Slates	Part 7
Evaluation & Impact	L1 Reaction, L2 Knowledge Gain, L3 Behaviour, L4 Results	Part 7
People & Records	Qualifications Register, Reporting Lines, Team Capability, Thought Leadership	Part 7
Community & Mentoring	Communities of Practice, Knowledge Transfer	Part 7
Governance & Policy	Policy Governance, Policy Library	Part 7

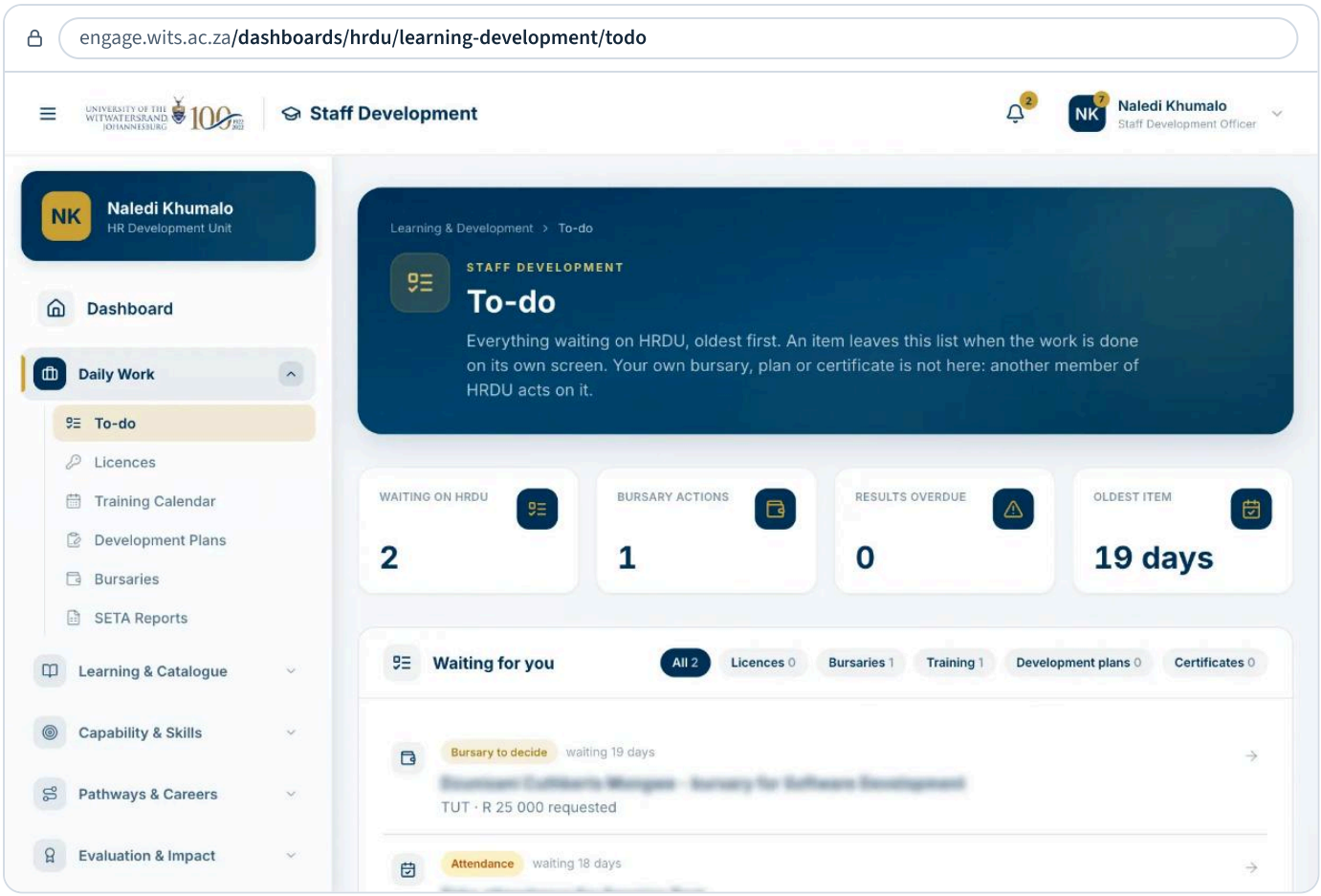
The to-do list

For HRDU · **Daily Work › To-do**

Everything in Engage that is waiting on HRDU, oldest first. Start your day here.

Work through the to-do list

1. Open **Daily Work › To-do**.
2. To see one kind of work, select a filter above the list: **Licences**, **Bursaries**, **Training**, **Development plans** or **Certificates**. **All** shows everything.
3. Select an item. It opens the screen where that work is done.



Each item says what kind of work it is and how long it has waited.

There is nothing to tick off. An item leaves the list on its own once the work is done on its own screen. When nothing is waiting, the list says **Nothing is waiting.** Your own bursary, plan or certificate never appears on your list: another member of HRDU acts on it.

Label	Why it is here	Where you act
Licence request	A staff member asked for a LinkedIn Learning licence.	Licences
Bursary to decide	An application has its manager's support, or has no manager on record, or its manager has changed.	Bursaries
Bursary to pay	The applicant accepted the agreement and uploaded proof of registration.	Bursaries
Results to check	The applicant uploaded their results.	Bursaries
Results overdue	A paid bursary's course ended and the results are later than the agreement allows.	Bursaries
Attendance	A session has ended and people on it are still marked booked.	Training Calendar
Plan to agree	A development plan was sent by someone with no manager on record, or whose manager has changed.	Development Plans
Certificate to verify	A staff member sent a certificate for learning done outside LinkedIn Learning.	Skills & Analytics

Verify a certificate

Staff send certificates from their own evidence portfolio, for courses, workshops or qualifications outside LinkedIn Learning. Each names one skill. Until you verify it, it counts for nothing.

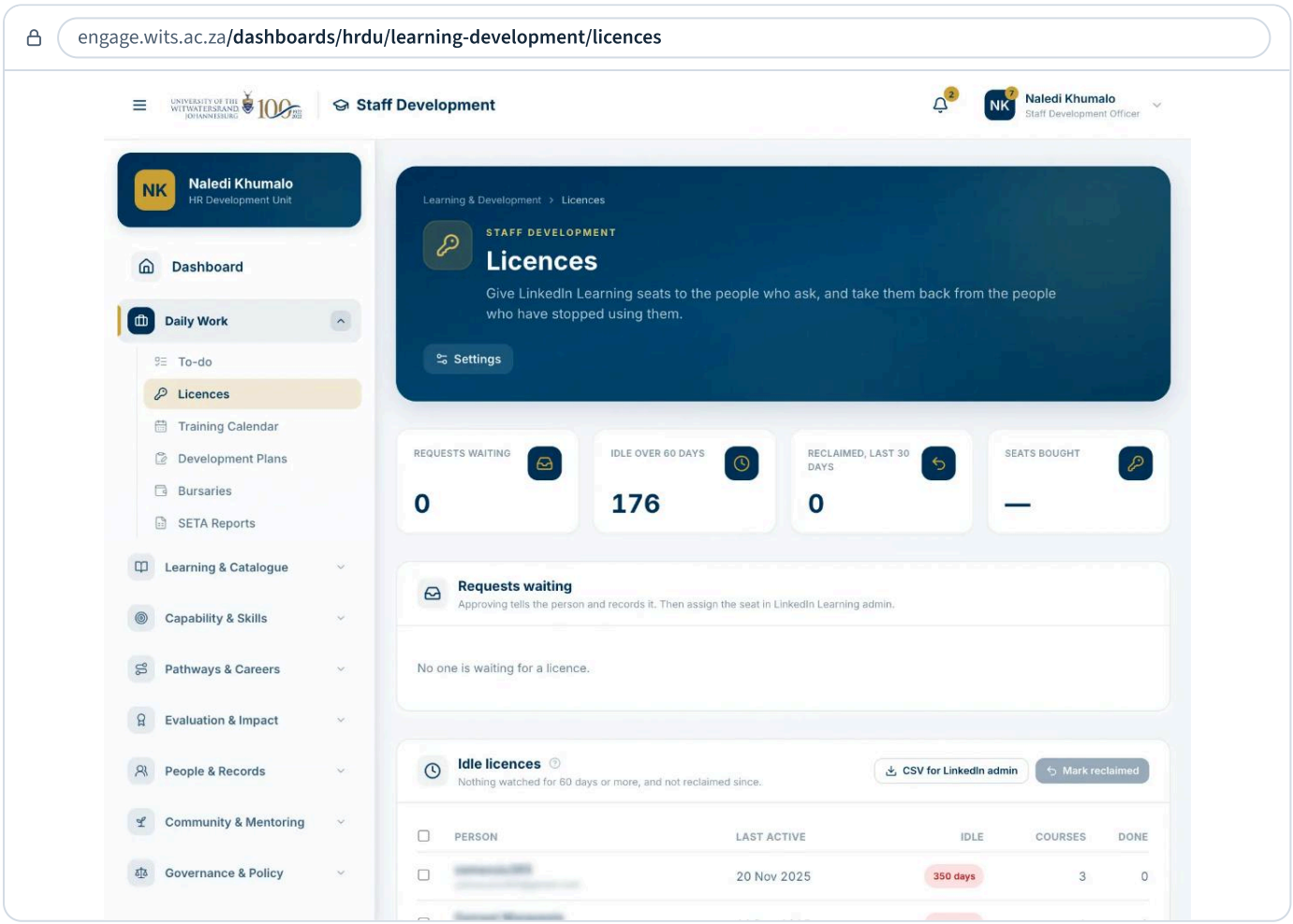
1. Open **Capability & Skills › Skills & Analytics**, or select the item on your to-do list. **Certificates to verify** is at the top of the page.
2. Read the skill and what the person wrote, then select **Open the certificate**. It opens in a new tab.
3. Select **Verify** if it shows the skill. Otherwise select **Do not accept**, type why, and select **Send the reason**. A reason is required.

The person gets a notification either way, with your reason if you did not accept it. A verified certificate counts towards that skill on their skills, competencies and evidence portfolio. Your own certificates are not in the list: another member of HRDU verifies them. A decision cannot be changed afterwards; the person can send the certificate again.

LinkedIn Learning licences

For HRDU · **Daily Work › Licences**

LinkedIn Learning is the online course library Wits pays for, one seat per person. Here you give seats to the people who ask, and take them back from people who have stopped using them.



Requests waiting comes first. Idle licences lists seats with no activity for the idle period.

Approve or decline a licence request

Staff ask for a licence from the Learning Hub, with a reason. Each request shows under **Requests waiting**. When there are none, it says **No one is waiting for a licence.**

1. Open **Daily Work › Licences**.
2. Read the reason under the person's name.
3. If you want to, type a message in **Note to them (optional)**.
4. Select **Approve** or **Decline**.

The person gets a notification straight away, with your note. An approval tells them to look out for the invitation from LinkedIn Learning in their Wits email. The request moves to **Decided requests**.

TAKE CARE

Approving records the decision. It does not give the person a seat. Assign the seat yourself in the LinkedIn Learning admin centre, or they will wait for an invitation that never comes.

Take back licences nobody is using

Idle licences lists everyone LinkedIn Learning has reported on whose last activity is older than the idle period (60 days unless you change it). **Never active** means no activity was ever reported.

1. Select **CSV for LinkedIn admin** to download the list as a spreadsheet.
2. Remove those seats in the LinkedIn Learning admin centre.
3. Back in Engage, tick the people whose seats you removed. The box in the heading row ticks the whole page.
4. Select **Mark reclaimed**. The button shows how many you ticked, for example **Mark 2 reclaimed**.

They leave the list and are counted under **Reclaimed, last 30 days**. The person is not sent a message. If they start learning again, they will not show as idle until the idle period passes once more.

GOOD TO KNOW

Someone who has left Wits also shows here until their seat is removed.

Set the idle period and the number of seats

1. Select **Settings** in the page header.
2. Set **A seat is idle after (days)**, between 7 and 365.
3. Optionally, enter **Seats bought** from the LinkedIn Learning contract.
4. Select **Save settings**.

The idle list and the **Seats bought** count update at once.

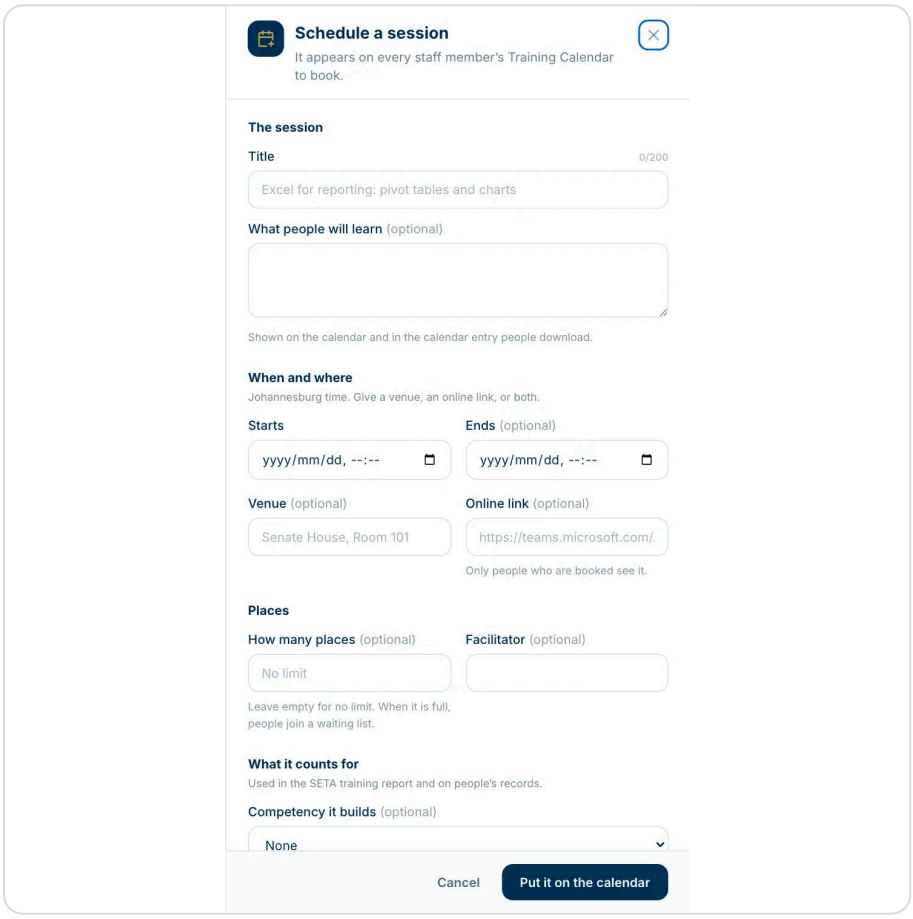
The training calendar

For HRDU · **Daily Work › Training Calendar**

The in-person and online sessions HRDU runs. Staff book places from their own Training Calendar; here you schedule sessions, see who is coming, and take the register.

Add a training session

1. Open **Daily Work › Training Calendar**.
2. Select **Schedule a session** in the page header. A form opens on the right.
3. Give a **Title** and a start time under **Starts**. Both are required. Times are Johannesburg time.
4. Add what else applies: **What people will learn**, **Ends**, a **Venue**, an **Online link**, **How many places** and the **Facilitator**.
5. Under **What it counts for**, choose the **Competency it builds**, the **Training hours** and the **Cost per person (R)**. These feed the SETA report and people's records.
6. Select **Put it on the calendar**.



Only the title and start are required. Leave the places empty for no limit.

The session appears under **Upcoming** and on every staff member's Training Calendar. Staff see how many places are left, never who booked. The online link shows only to people who are booked. If you leave **Training hours** empty, Engage uses the length of the session.

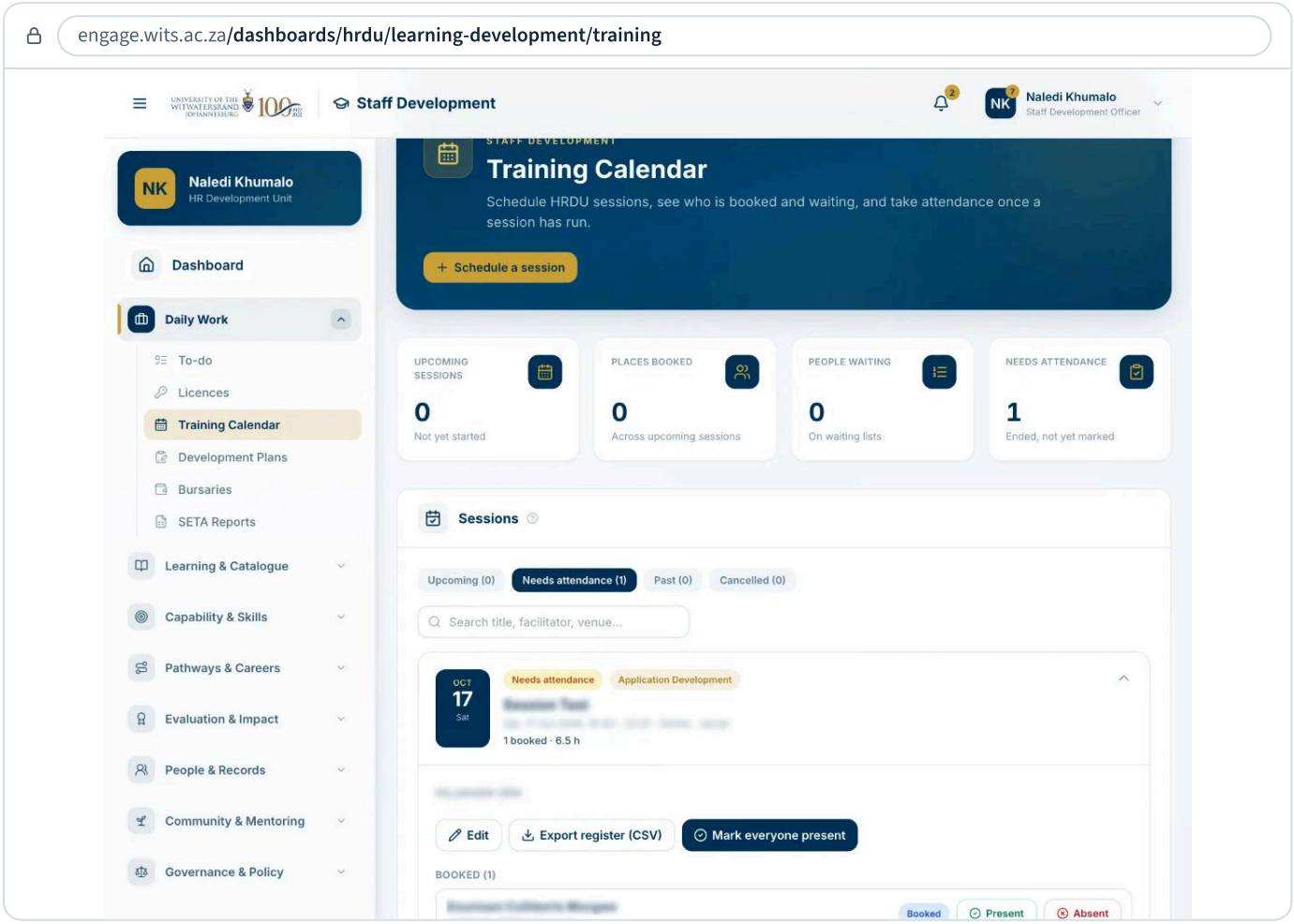
TAKE CARE

Staff can book a session as soon as you save it. Check the date and time before you select **Put it on the calendar**.

See the bookings and the waiting list

The tabs above the list sort sessions by where they stand: **Upcoming**, **Needs attendance**, **Past** and **Cancelled**. Each shows how many it holds. The search box finds a session by title, facilitator or venue. The list goes back six months.

1. Select a session to open it.
2. Read **Booked** for the people with a place, and **Waiting list** for the queue, in order.
3. To take the list away, select **Export register (CSV)**.



An opened session: its buttons, then who is booked and who is waiting.

When a session is full, staff join the waiting list. When someone cancels, the first person waiting is booked automatically and gets a notification, "A place opened up: you are booked". Staff cannot book or cancel once a session has started.

Mark attendance

Once a session has started, each booked person gets a **Present** and an **Absent** button. A session that has ended with people still marked booked moves to **Needs attendance** and shows on your to-do list.

1. Open the session, from the **Needs attendance** tab or from the to-do list.
2. Select **Present** or **Absent** for each person.
3. If everyone came, select **Mark everyone present** instead. It marks only the people you have not yet marked, so anyone you marked absent stays absent.

The session leaves **Needs attendance** and the to-do list once nobody is left marked booked. Each person sees "You attended" or "You were marked absent" in their training history. You can change a mark later by selecting the other button.

Change a session

1. Open the session and select **Edit**.
2. Make your changes and select **Save changes**.

If you change the time, the venue or the online link, everyone booked or waiting gets a notification giving the new time and place, and asking them to download the calendar entry again. If you add places, or remove the limit, people on the waiting list are booked in queue order and told.

Cancel a session

1. Open the session and select **Cancel session**. This button shows only until the session starts.
2. Read how many people will be told.
3. Type a **Reason (sent with the notice)**, for example that the session will be rescheduled.
4. Select **Cancel the session**. **Keep it** leaves it as it was.

Everyone booked or waiting gets a notification with your reason, and sees the session under **Called off by HRDU** on their calendar.

> **TAKE CARE**
> A cancelled session cannot be brought back. Schedule a new one instead.

Development plans

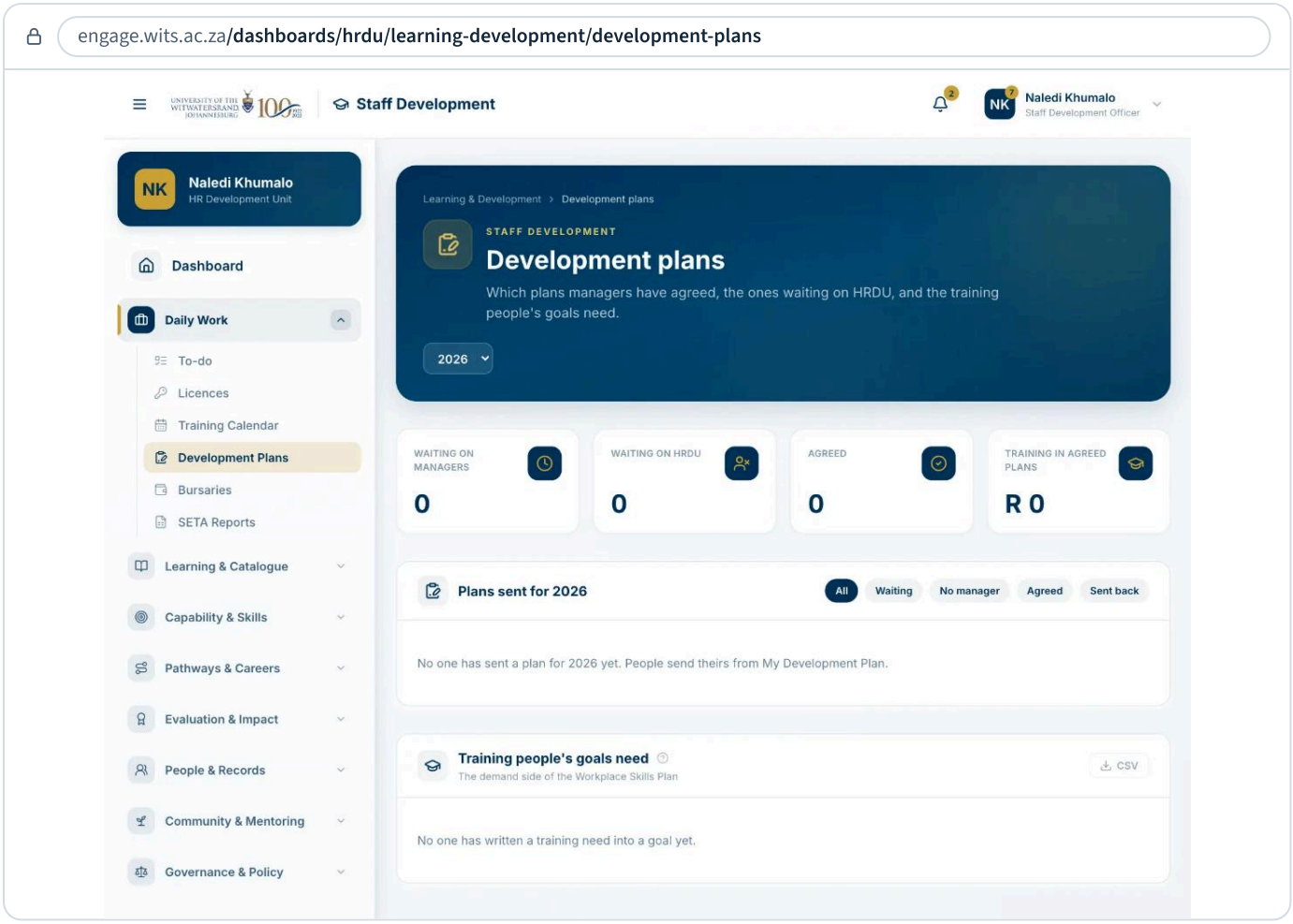
For HRDU · **Daily Work › Development Plans**

Each staff member sends their development plan to their manager, who agrees it or sends it back. HRDU sees every plan for the year, agrees the ones that have no manager, and collects the training the goals need.

See where every plan stands

1. Open **Daily Work › Development Plans**.
2. Choose the year in the page header.
3. Use the filters on **Plans sent for** the year: **Waiting**, **No manager** (no manager on record, or a manager who has since changed), **Agreed** or **Sent back**.

4. Select a person to read their goals, the training each goal needs, and any note from whoever decided.



Early in the year the page is empty. It fills as staff send their plans from My Development Plan.

The four counts at the top show plans **Waiting on managers**, plans **Waiting on HRDU**, plans **Agreed**, and the cost of the **Training in agreed plans**. A plan with a manager on record is the manager's to decide. You can read it, but you cannot agree it.

Sign off a plan that is waiting for HRDU

A plan comes to HRDU when the person has no manager on record, or their manager has changed since they sent it. It carries a **For HRDU** label and shows on your to-do list.

1. Select the person to open their plan.
2. Read the goals and the training they need.
3. Select **Agree**, or type a note and select **Send back**. A note is required to send a plan back.

The person gets a notification: "Your development plan is agreed", or "Your development plan needs another look" with your note. Your own plan shows a note instead of the buttons: another member of HRDU agrees it.

Collect the training people's goals need

Training people's goals need lists every goal where the person wrote down the training it needs and what it would cost. **Agreed** means the plan it belongs to was agreed. This is the demand side of the Workplace Skills Plan.

- Select **CSV** to download the list, with names, goals, training, cost and whether the plan is agreed.
- **Training in agreed plans**, at the top, adds up the cost of the training in agreed plans.

GOOD TO KNOW

Costs are the person's own estimate until a course is booked.

Staff bursaries

For HRDU · **Daily Work › Bursaries**

A staff bursary is Wits paying an institution for a staff member's studies. Engage carries each one from application to close. HRDU decides it, pays the institution, checks the results and closes it.

Follow a bursary from application to close

Each application moves through these stages in order. An opened application shows them as a row of numbered steps. When an application went straight to HRDU, the manager's step reads **No manager**, or **Manager changed** if HRDU decided because the manager had moved on.

Stage on your screen	What happens	Who acts	What the employee sees
With manager	The employee sent the application. It went to their manager.	The manager supports it or not	With your manager
Needs a decision	The manager supported it, there is no manager on record, or the manager has changed since it was sent.	HRDU approves or declines	With HRDU
Awaiting agreement	HRDU approved an amount.	The employee reads and accepts the bursary agreement	Approved - accept it
Awaiting registration	The employee accepted the agreement.	The employee uploads proof of registration	Upload your registration
Ready to pay	Registration is proven.	HRDU pays the institution and records it	Being paid
Paid	The institution is paid. The employee is studying.	The employee uploads results when they have them	Paid - studying
Results to check	The employee uploaded results.	HRDU checks them and closes the bursary	Results with HRDU

Stage on your screen	What happens	Who acts	What the employee sees
Completed	Closed with nothing to repay.	Nobody	Completed
Converted to loan	Closed, and some or all of the payment becomes an interest-free loan.	HR arranges salary deductions	Now a loan

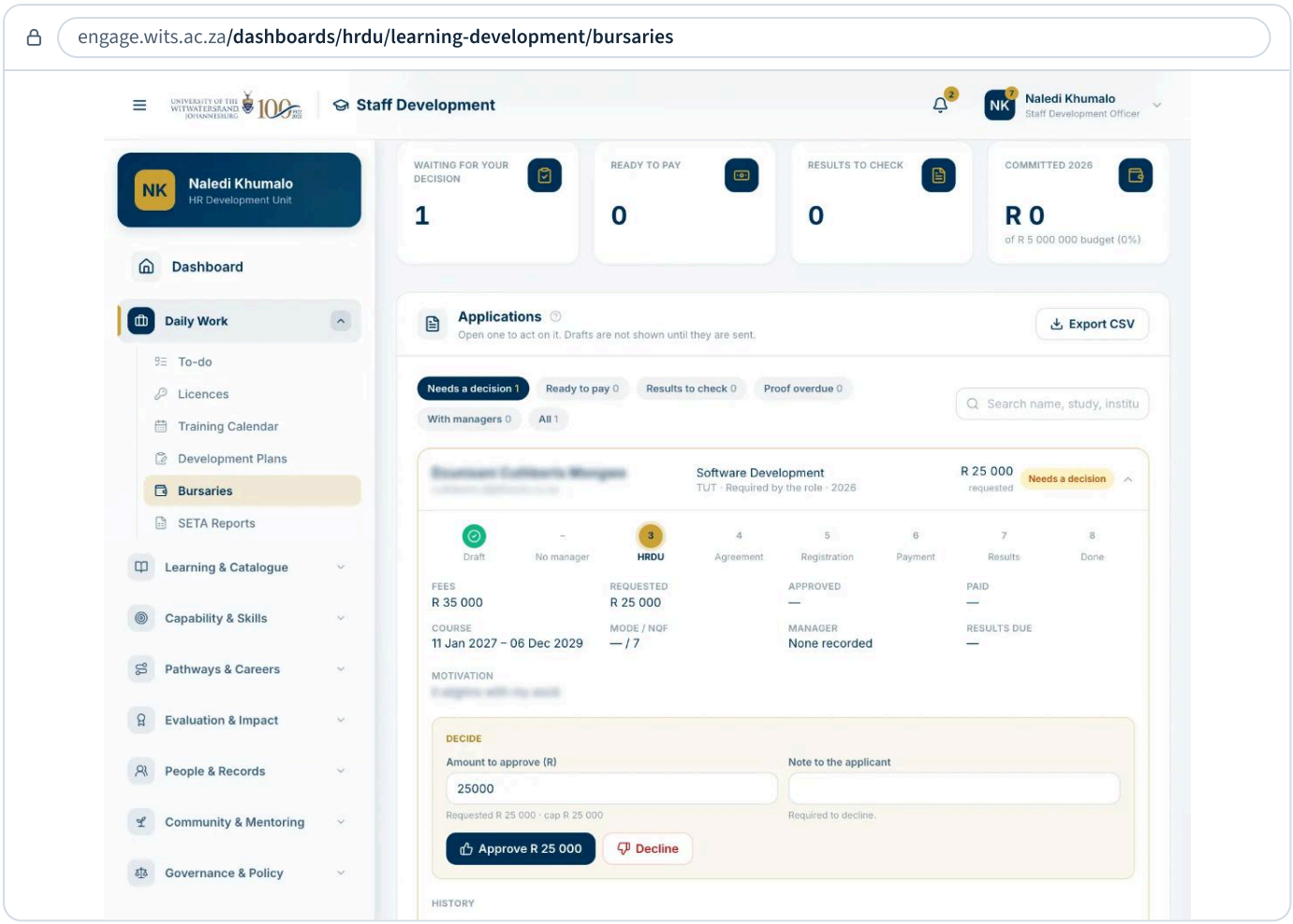
An application can also end as **Declined** (by the manager or by HRDU) or **Withdrawn** (by the employee, any time before they accept the agreement). The employee gets a notification when their manager decides, when HRDU decides, and when the bursary is closed.

TAKE CARE

You cannot approve, pay or close a bursary you applied for yourself. Your own application shows a note instead of the buttons, and another member of HRDU must do it.

Approve or decline an application

1. Open **Daily Work › Bursaries**. The list opens on **Needs a decision**.
2. Select the application to open it. Read the motivation, the relevance to the role, the fees and the manager's note.
3. Under **Decide**, check **Amount to approve (R)**. It starts at the amount requested, or the cap if that is lower.
4. Type a **Note to the applicant** if you want to. It is required to decline.
5. Select **Approve** (the button shows the amount, for example **Approve R 25 000**) or **Decline**.



An opened application: the stages, its facts, and the panel for what HRDU does next.

You cannot approve more than the cap for the kind of study: one cap for developmental study, a higher one for study the role requires. On approval the employee is asked to accept the agreement. The terms in force today are fixed into that agreement, so a later change to the scheme terms does not alter it.

GOOD TO KNOW

If the employee's manager has changed while the application waited, the old manager can no longer support it. It shows under **Needs a decision**, is counted in **Waiting for your decision**, and opens with a panel headed **Decide - their manager has changed**.

Record a payment to the institution

1. Select the **Ready to pay** filter and open the application.
2. Select **Proof of registration** to read the document the employee uploaded.
3. Pay the institution directly, outside Engage.
4. Enter the **Amount paid (R)**, which cannot be more than the amount approved, and the date under **Paid on**.
5. Select **Record payment**.

The application moves to **Paid**, and the employee sees what was paid and the date their results are due.

Check results and close a bursary

1. Select the **Results to check** filter and open the application.
2. Select **Results** to read what the employee uploaded.
3. Under **Close**, choose the **Outcome**: **Passed**, **Partly passed**, **Failed**, **Did not finish** or **Left Wits**.
4. For **Partly passed**, enter the **Amount that becomes a loan (R)**.
5. Add a **Note**. It is shown in the history and as the reason for any loan.
6. Read the line under the form. It says how much becomes a loan, or that there is nothing to repay.
7. Select **Close the bursary**, and confirm.

Failed and did not finish turn the whole payment into an interest-free loan. Left Wits turns all of it into a loan if they leave within 12 months of the course ending, and half within 24 months (or the periods in that bursary's agreement). The employee gets a notification: either that the bursary is complete, or the loan amount and that HR will be in touch about deductions.

> **TAKE CARE**
> Closing cannot be undone. Check the outcome and the loan amount before you confirm.

Use **Proof overdue** to find paid bursaries whose results are late. You can close one of these without results if you know the outcome another way.

Set the scheme terms

1. Select **Scheme terms** in the page header.
2. Set the caps, an optional budget for the year, and the dates applications open and close (leave both empty to take them all year).
3. Set the months to send results, the months to repay a loan, and the two periods for repaying all or half when someone leaves.
4. Select **Save terms**.

New approvals use the new terms. Bursaries already approved keep the terms they were approved with. Staff see the caps and the application window on their own Bursaries page.

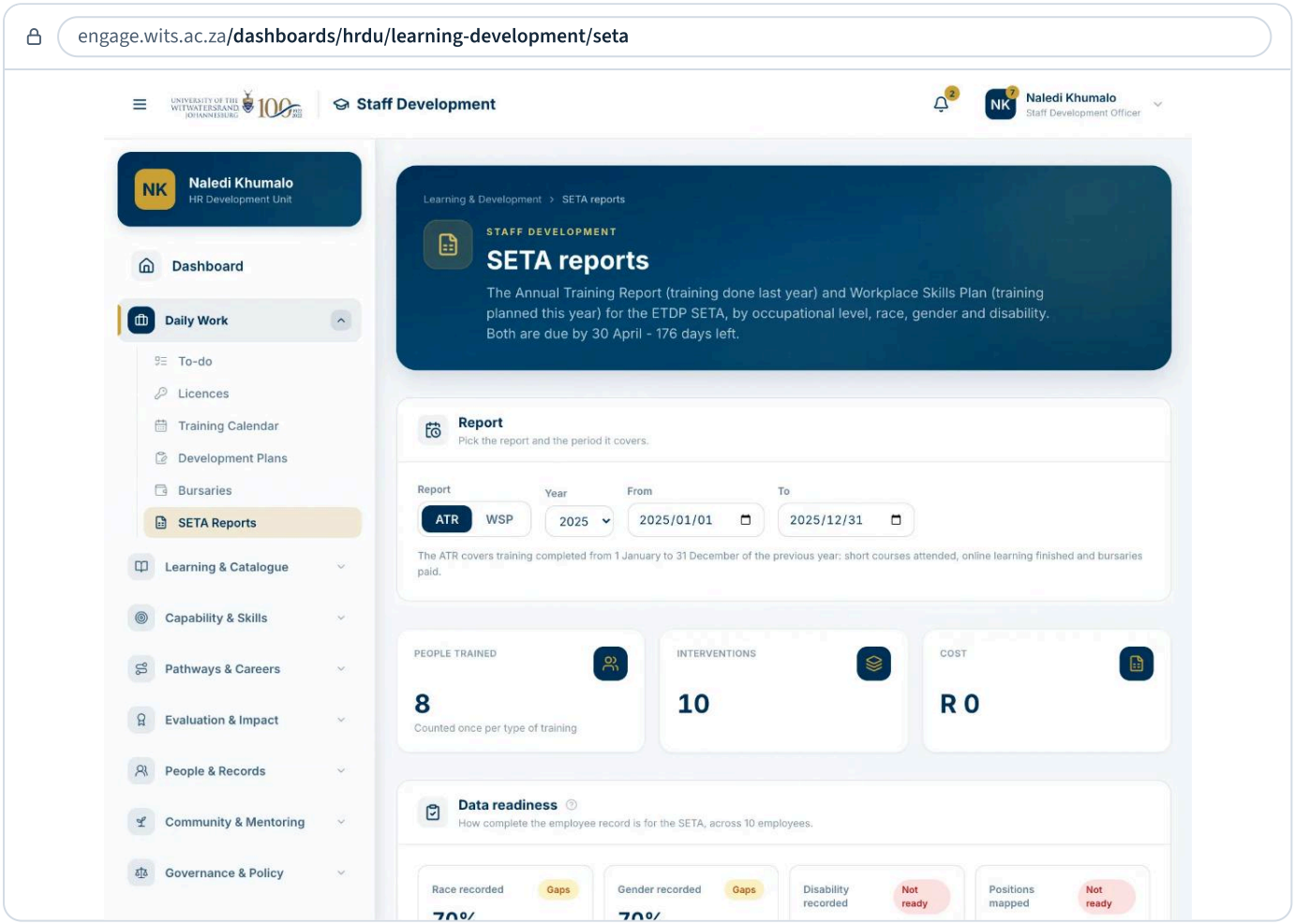
SETA reports

For HRDU · **Daily Work** › **SETA Reports**

The ETDP SETA is the sector education and training authority Wits reports its staff training to. Each year, by 30 April, Wits sends two returns: the Annual Training Report (ATR), the training done last year, and the Workplace Skills Plan (WSP), the training planned for this year. This page builds both, laid out the way the SETA template asks.

Produce the Annual Training Report or Workplace Skills Plan

1. Open **Daily Work › SETA Reports**. The page header counts the days to 30 April.
2. Under **Report**, select **ATR** or **WSP**.
3. Choose the **Year**. The ATR opens on last year and the WSP on this year. The **From** and **To** dates fill in for the whole year; change them if you need a different period.
4. Read the report further down the page, then select **Download CSV** for the table as laid out, or **Raw rows** for every line behind it.



Pick the report and the year. The totals and the report update straight away.

Below the picker come three totals (**People trained**, **Interventions** and **Cost**), then Data readiness, then the report itself: people trained by occupational level down the side, and race and gender across, as in the SETA template. **Disability** and **By type of training** follow it.

- **The ATR** counts sessions people attended, LinkedIn Learning courses they completed, and bursaries paid in the period.
- **The WSP** counts sessions people are booked on, bursaries approved and not yet paid, and the training needs in agreed development plans.
- A person with two kinds of training, say a short course and a bursary, is counted once in each. Hours are known only for scheduled sessions.
- Anyone whose race, gender or level is missing, or who is not on the employee record at all, is counted under **Not recorded**, so the totals still add up.

Check what is missing before you submit

Data readiness shows how complete the employee record is for the SETA: race, gender, disability, and positions mapped to an OFO code. Each figure is labelled **Ready**, **Gaps** or **Not ready**, and the line under them lists what to chase. Race, gender and position are corrected on the employee record by HR, and the report updates.

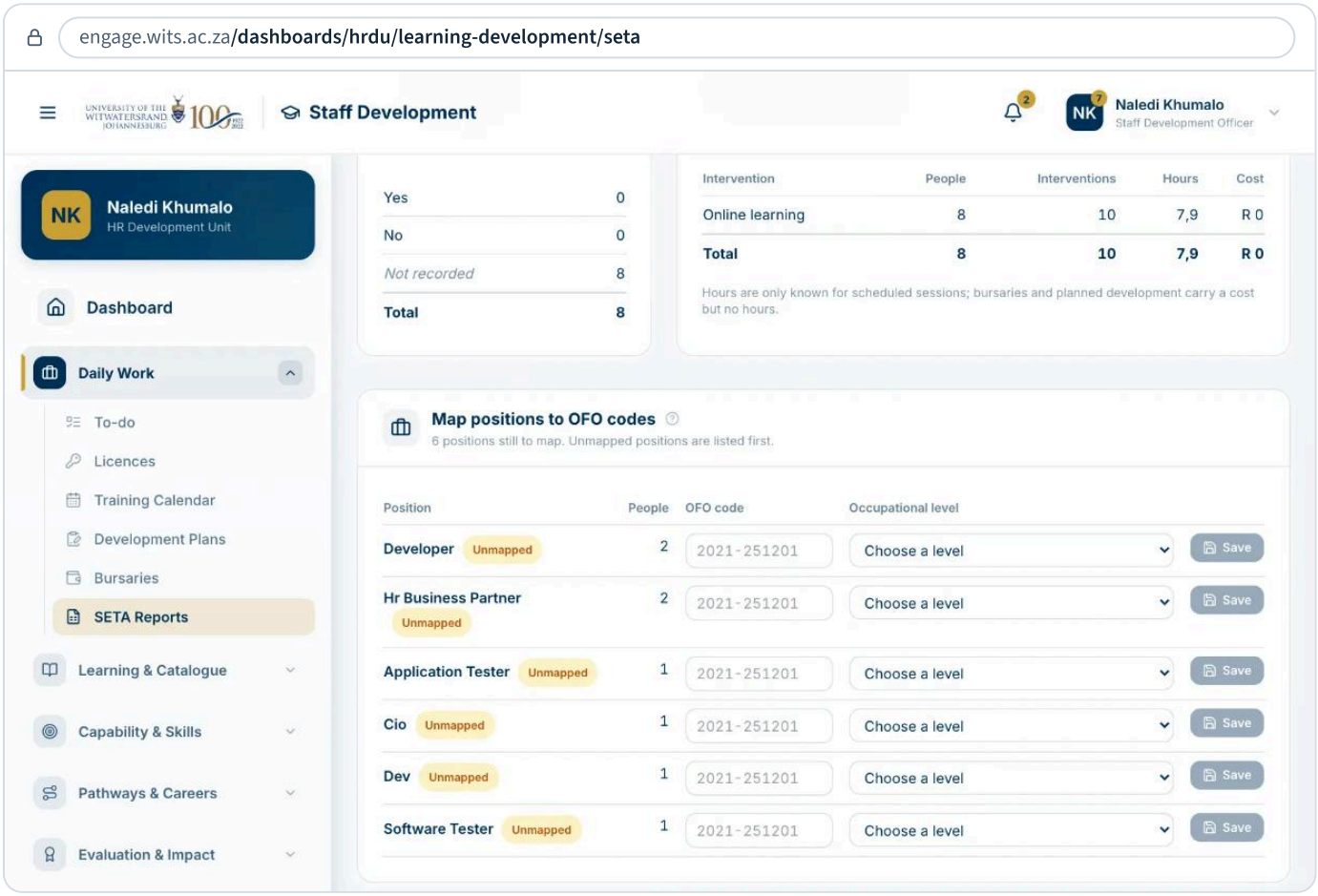
GOOD TO KNOW

Engage has no field for disability yet, so the disability figures read Not recorded until it arrives from the HR system. "Prefer not to say" is a real answer and stays under Not recorded.

Map jobs to OFO codes

The OFO (Organising Framework for Occupations) is the national list of occupation codes the SETA uses. Each position at Wits needs an OFO code and an occupational level. The level decides which row of the report the position's people appear on.

1. Scroll to **Map positions to OFO codes**. Positions marked **Unmapped** come first.
2. Type the code in the form shown, for example 2021-251201.
3. Choose the **Occupational level**.
4. Select **Save**.



One mapping covers every spelling of a position.

Save stays greyed out until the code is in that form and a level is chosen. Once saved, the report reloads with those people on their level. To remove a mapping, clear the code and select **Remove**.

The learning catalogue

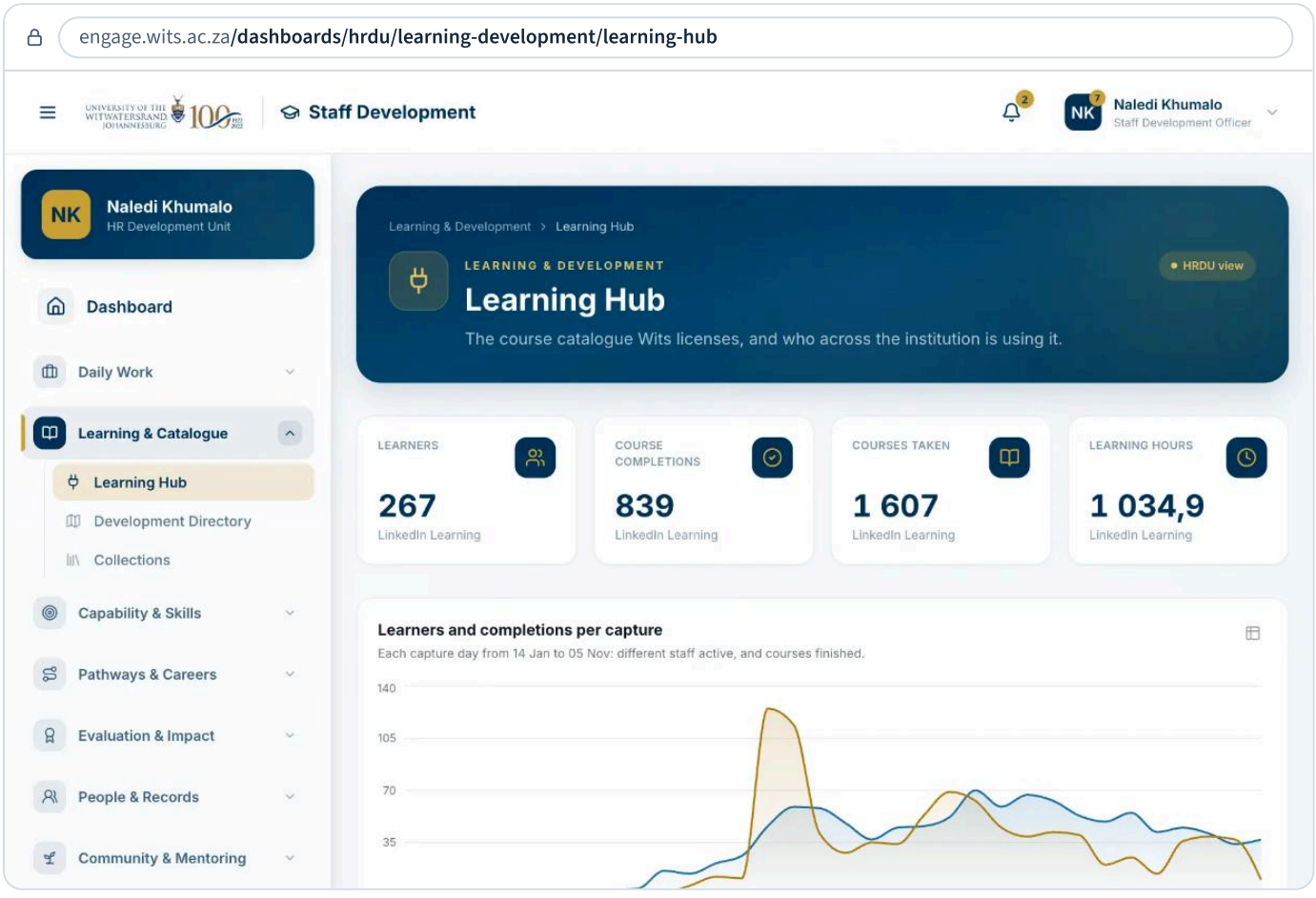
For HRDU · **Learning & Catalogue** in the sidebar

Three screens: the Learning Hub, to see who is learning; Collections, to put courses in front of a group of staff; and the Development Directory, for the development Wits offers outside LinkedIn Learning.

See who is learning in the Learning Hub

Open **Learning & Catalogue** › **Learning Hub**. The figures at the top count learners, completions, courses taken and hours across Wits, with charts below. Then three tabs:

- **Who is learning**: every person's course activity, with filters by status and progress, and the most popular courses.
- **Find a course**: search the whole LinkedIn Learning catalogue and open any course.
- **Connection**: whether the link to LinkedIn Learning is working. Look here when a figure seems wrong.

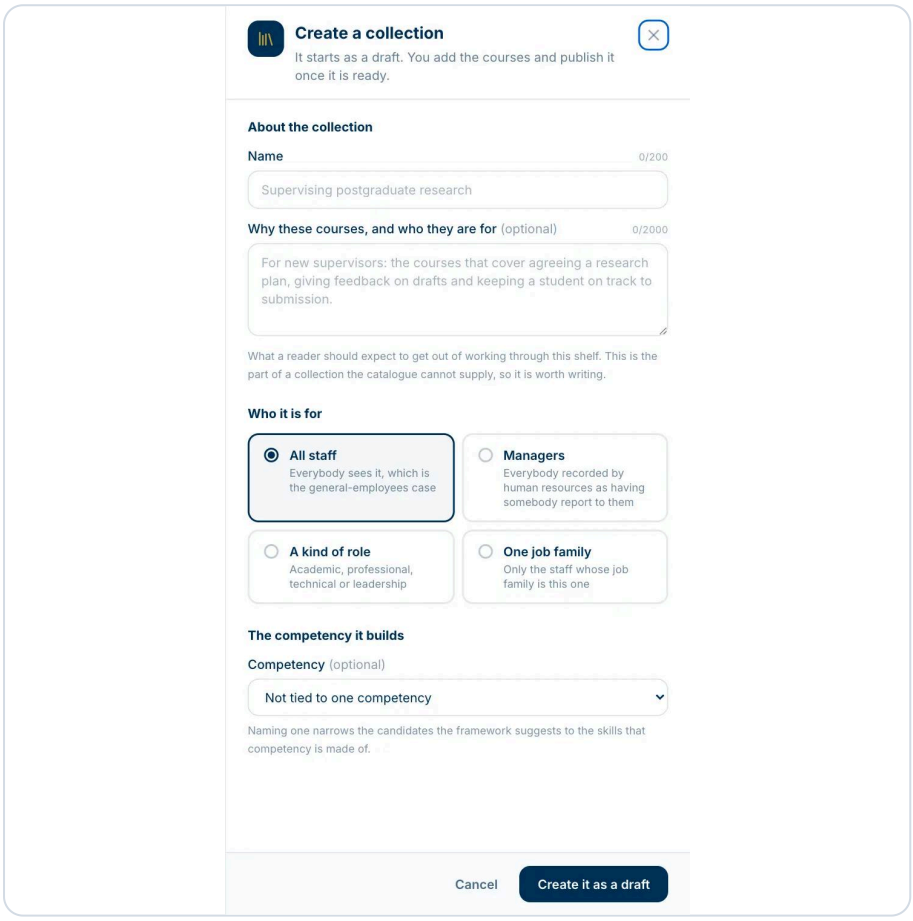


The Learning Hub as HRDU sees it: the whole institution, not your own courses.

Curate a collection

A collection is a shelf of LinkedIn Learning courses you choose, in the order you want them taken, for one group of staff. Nothing goes on a shelf unless someone in HRDU puts it there.

1. Open **Learning & Catalogue › Collections** and select **New collection**. Before anything is curated, the button in the middle of the page reads **Create the first collection**.
2. Give it a **Name**, and say **Why these courses, and who they are for**.
3. Under **Who it is for**, choose **All staff**, **Managers**, **A kind of role** or **One job family**.
4. Optionally, choose the **Competency** it builds.
5. Select **Create it as a draft**.
6. In **On the shelf**, search under **Add a course from the catalogue** and select **Add** on each course. **Candidates the framework suggests** offers courses that match the skills this audience needs.
7. Use the up and down arrows to set the order.



A new collection starts as a draft. Staff see nothing until you publish it.

- **Publish** puts a collection in front of its audience. **Unpublish** takes it back to a draft.
- **Curate** opens a collection's shelf to change its courses.
- Each collection shows how many staff are in its audience, how many started it and how many finished every course. The filters above the list find collections by audience, or by **Published** and **Draft**.

Staff see a published collection on their own Collections page, with what they have already finished on it. They are not sent a message when you publish one.

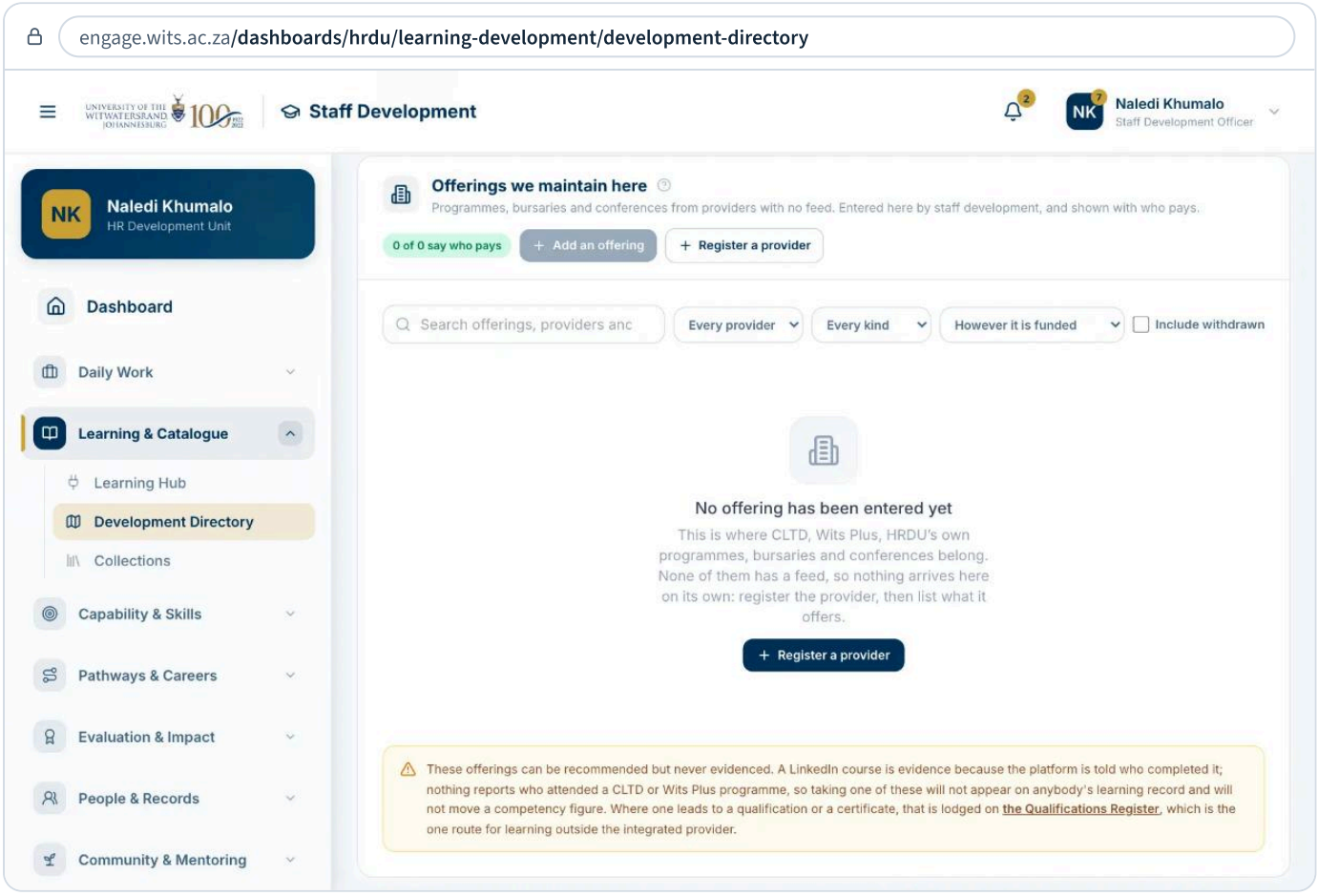
TAKE CARE

Delete asks you to confirm, then removes the collection and the courses on its shelf. It cannot be undone. To hide a collection for a while, select **Unpublish** instead.

Keep the development directory up to date

The Development Directory is what staff see as **What to Learn Next**. HRDU sees it as **What We Can Offer Staff**. From the top:

- How much of the LinkedIn Learning catalogue Wits pays for, and how much of it nobody has opened. **Licensed content nobody has opened** lists unopened courses that teach a skill the competency framework requires.
- **What we are currently asking of staff**: the campaigns running, and how far each has got. Campaigns are explained in Part 7.
- **Offerings we maintain here**: development Wits offers that has no feed of its own, such as CLTD, Wits Plus, HRDU's own programmes, bursary schemes and conferences. You type these in.
- **Providers**: where development comes from. LinkedIn Learning shows as **Integrated**; Oracle Learning Management, the Wits system for compliance training, shows as **Integration pending**.



Register a provider first. Until then, Add an offering stays greyed out.

1. Under **Offerings we maintain here**, select **Register a provider** for a unit or scheme that is not yet listed. Fill in the form and select **Register this provider**.
2. Select **Add an offering**. Say what it is, who runs it, who pays, who it is for, when it runs and how to apply.
3. Choose the competencies it develops. They are what put it in front of a staff member with that gap.

4 Select **List this offering**.

An offering shows to staff under **Other development at Wits**, with who pays for it. **Add an offering** stays greyed out until at least one provider is registered.

- **Edit** on an offering changes its details.
- **Withdraw** takes it away from staff. **List again** brings it back. Tick **Include withdrawn** to see withdrawn offerings in the list.

GOOD TO KNOW

Nobody reports attendance for these offerings, so taking one does not appear on anyone's learning record. A qualification that comes from one is lodged on the person's record by hand.

PART 7 · STAFF DEVELOPMENT (HRDU)

Capability, careers and impact

For the Human Resources Development Unit. This part covers the competency framework and the skills picture, demand targets, pathways and careers, the four levels of learning evaluation, the people records HRDU keeps, communities and mentoring, and policy governance. Part 6 covers your home page and the daily work.

How the figures are worked out

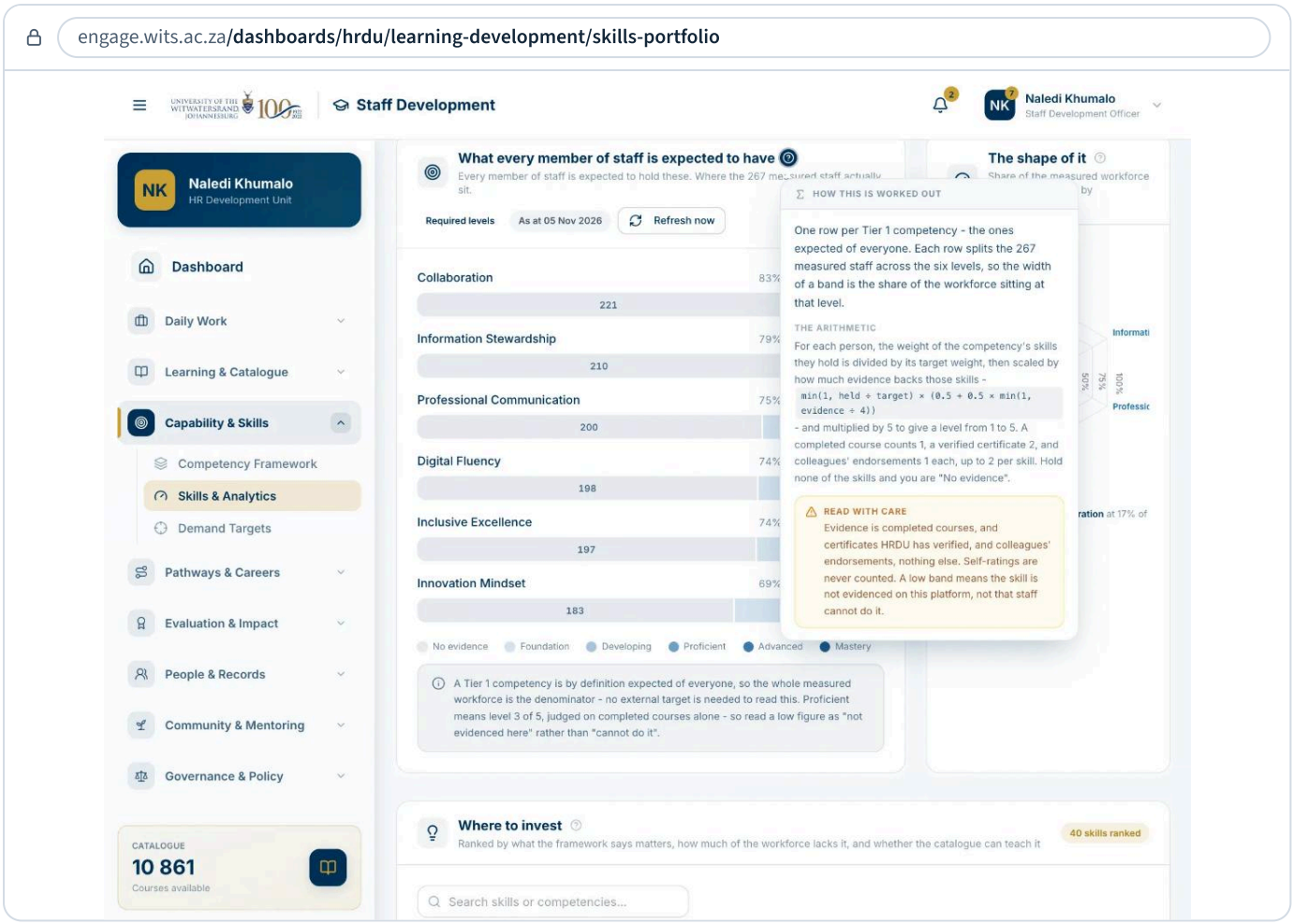
For HRDU · every page in this part

Most figures in this part are worked out, not counted. A competency level is not an exam result or a manager's rating: Engage calculates it from the courses a person has finished. Read this chapter once before you act on any figure.

See the working behind a figure

Many panels have a small **?** beside their title. Point at it, or tap it on a phone, and a card headed **How this is worked out** opens. It has three parts:

- a plain sentence on what the panel shows;
- **The arithmetic**: exactly how the number is reached;
- **Read with care**: what the number must not be taken to mean.



The ? beside a panel title opens the working. Here it explains the Tier 1 bars, and the amber box says a low band means "not evidenced here", not "cannot do it".

Each chart also has a small grid icon at its top right. Select it to see the chart's figures as a table, and again to return to the chart.

Read a competency level

A competency is made up of skills, and each skill carries a weight. Engage looks at the skills a person has evidence for, and asks two things.

- **How much of the competency they hold.** The weight of the skills they have evidence for, out of the competency's "bar". The bar is the combined weight of its twelve heaviest skills.
- **How deep the evidence goes.** The average evidence behind each skill they hold. Four units of evidence on a skill (see below) counts as full depth.

Strength = how much they hold × (half + half of the depth). The level is the strength out of five, rounded up. Someone who holds half the competency's skill weight, with one course behind each skill, has a strength of about 31%: level 2, Developing.

Level	Name	Strength
0	No evidence	Holds none of the competency's skills
1	Foundation	Up to 20%

Level	Name	Strength
2	Developing	Over 20%, up to 40%
3	Proficient	Over 40%, up to 60%
4	Advanced	Over 60%, up to 80%
5	Mastery	Over 80%

Evidence is counted in units. A completed course is one unit. A certificate HRDU has verified is two. Each endorsement from a colleague is one, up to two units of endorsements per skill. A person's ratings of their own skills are shown beside these but never counted. Some pages count the units on one skill directly.

Know where the figures come from, and what they cannot see

- **LinkedIn Learning.** Engage collects each person's LinkedIn Learning activity overnight. A finished course is the evidence; the skills the course teaches are what it evidences. LinkedIn Learning is Wits's online course library, and the only course provider connected to Engage.
- **What staff and HRDU record in Engage.** Certificates and endorsements from colleagues, once HRDU has verified them (both on a person's evidence portfolio), qualifications staff lodge, reporting lines, targets, ratings and follow-ups.
- **"Measured staff"** means people whose LinkedIn Learning activity Engage has collected. It is not the whole of Wits.

The figures cannot see:

- skills people use at work but have never taken a course on;
- courses taken anywhere else, including Oracle Learning Management, where Wits's compliance training sits, which sends nothing to Engage yet;
- a course started but not finished;
- job families. Wits records nobody's job family, so Engage works one out for each person from their courses until HRDU sets it.

GOOD TO KNOW

Levels across Wits are low because few staff have finished many courses. Read a low figure as "not evidenced here", never as "cannot do it".

The competency framework

For HRDU · **Capability & Skills** › **Competency Framework** in the menu

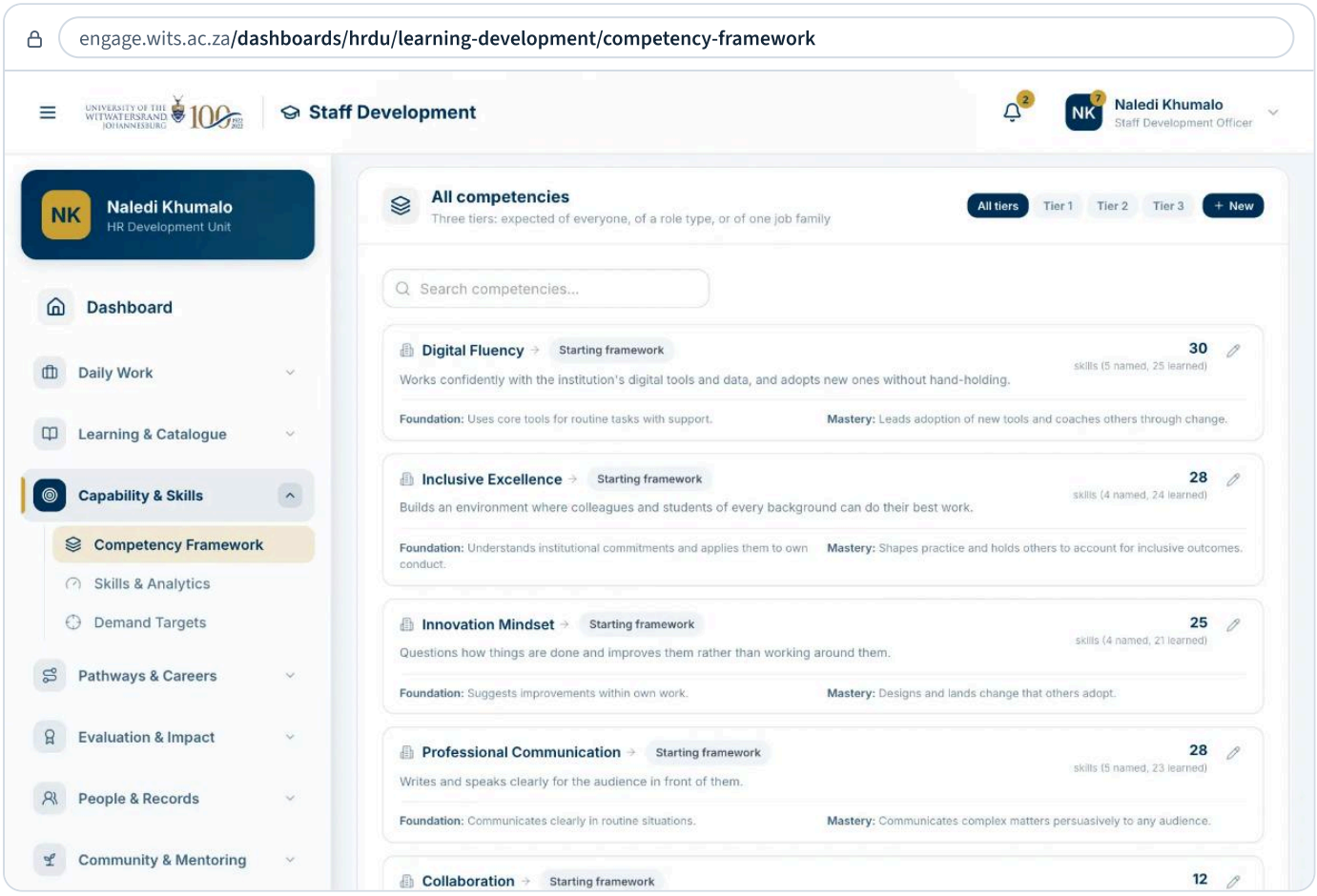
The framework lists the competencies Wits staff are expected to build, in three tiers. It was written inside Engage as a starting point, not issued by Wits. HRDU owns it: anything you edit becomes Wits's own and carries your name.

- **Tier 1**: expected of every member of staff.
- **Tier 2**: expected of a role type (academic, professional, technical or leadership).
- **Tier 3**: specific to one job family, a group of related work.

Find your way round the framework

The four figures at the top count the competencies by tier, how many records have been **Made Wits's own**, the skills mapped to competencies, and the staff scored. Five charts follow, then five tabs:

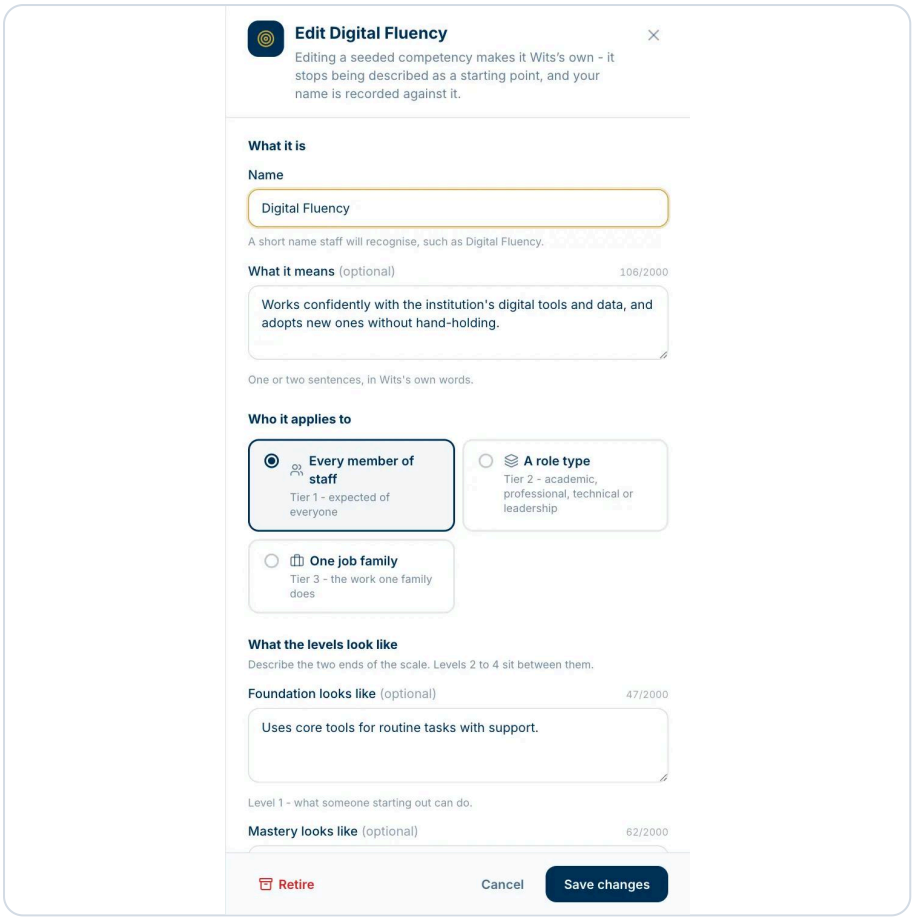
- **Competencies**: every competency, with its skills and what Foundation and Mastery look like.
- **Job families**: the families HRDU owns.
- **Where staff sit**: how many staff have evidence on each competency.
- **Required levels**: how many competencies carry a demand target, with a link to Demand Targets.
- **How it is built**: where each competency's skills come from, and how well the course catalogue serves it.



Each competency shows its skill count (named and learned), its Foundation and Mastery descriptions and, until someone edits it, **Starting framework**. Filter by tier, or add one with **New**.

Add or change a competency

1. On the **Competencies** tab, select **New**, or the pencil on a competency. A form opens from the right.
2. Under **What it is**, fill in **Name** and **What it means**.
3. Under **Who it applies to**, choose **Every member of staff**, **A role type** or **One job family**. For the last two, choose which one.
4. Under **What the levels look like**, describe **Foundation looks like** (level 1) and **Mastery looks like** (level 5). Levels 2 to 4 sit between them.
5. Select **Create competency** or **Save changes**.



Editing a competency from the starting framework makes it Wits's own, with your name recorded against it.

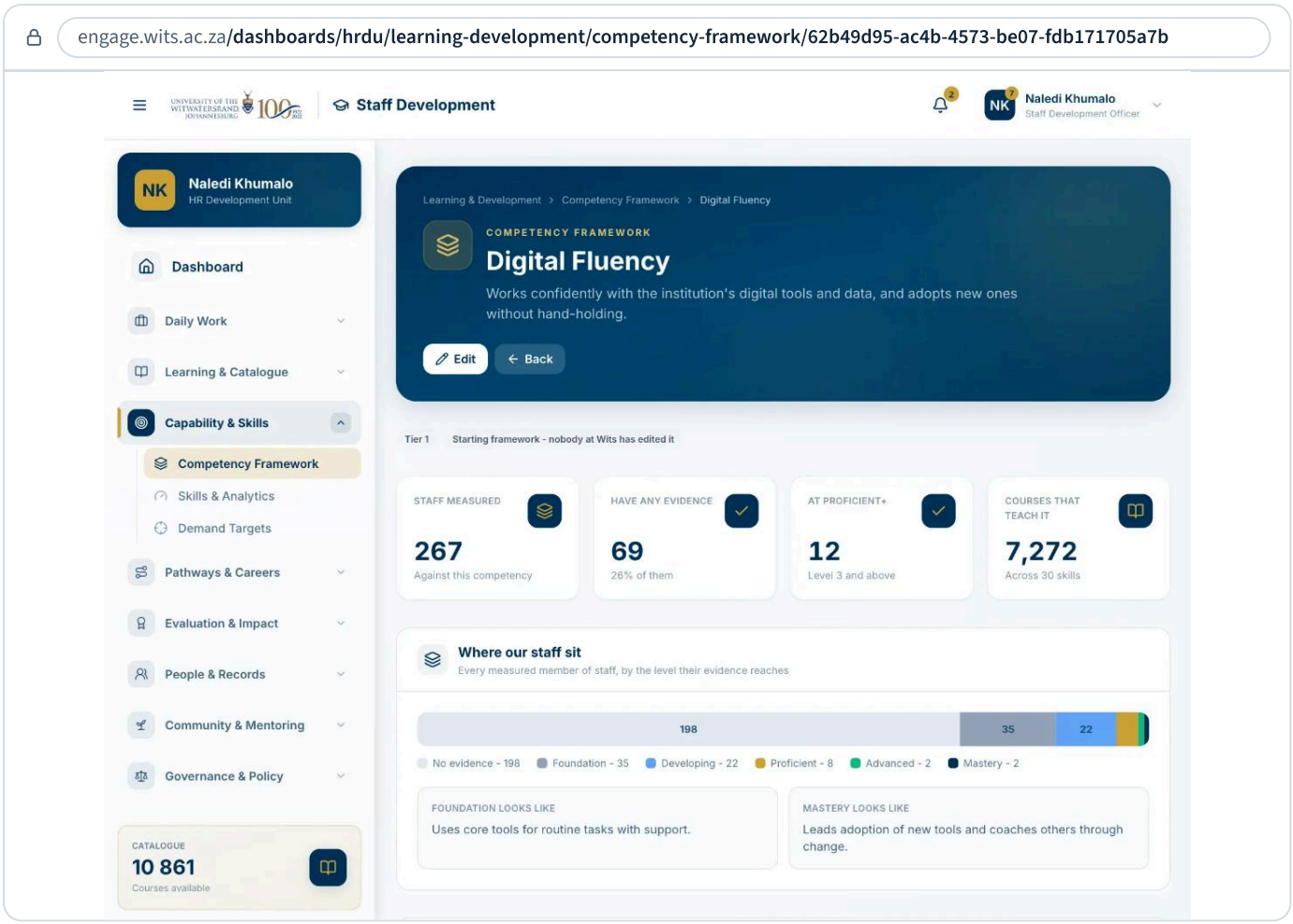
A new competency has no skills yet. Open it and name its defining skills (see below); Engage then finds the rest overnight.

Retire a competency

Open its form, select **Retire**, then **Retire it** to confirm, or **Keep** to stop. A retired competency is removed from every screen, and from every level and figure that used it.

Decide which skills make up a competency

1. Select a competency's name. Its own page opens.
2. Under **What it is made of**, read the skills. Each says how many courses teach it and where it came from: **defines this competency** (named by hand) or **found in the catalogue** (worked out by Engage).
3. To add a defining skill, select **Name a skill**, type at least two letters, and select the skill. It is added at once.
4. To drop a skill that does not belong, select **Remove**. **Put back** restores it.



A competency's own page: how many staff have any evidence, how many reach Proficient, and one bar showing everyone by level. Select **Edit** to open the same form as the list.

TAKE CARE

Remove and **Name a skill** act at once, with no confirmation, and change how every member of staff is scored on this competency. They also move its **Bar**: there is no field for the bar, so correcting the skills is how you correct it. A removed skill stays removed when Engage refreshes overnight.

Look after the job families

1. Select the **Job families** tab.
2. Select **Add family**, or the pencil on a family.
3. Fill in **Name**, **What this family does** and **Role type**. The role type links the family's staff to the Tier 2 competencies for their kind of work.
4. Select **Create job family** or **Save changes**. To remove a family, select **Retire**, then **Retire it**.

The route icon beside each family opens **Pathways** showing only that family's pathways. To set the family a person belongs to, see See the people behind a figure.

See where staff sit on each competency

Select **Where staff sit**. Each competency shows **Staff with evidence** and its **Average strength**. Filter by tier, or show only the **Weakest third** or **Strongest third**.

> **GOOD TO KNOW**
> The colours rank competencies against each other, not against 100%. Average strength across Wits runs only from about a tenth to under a third, so fixed colour bands would paint everything the same. Green means "strongest of what we have", not finished. The percentage in the cell is the real figure.

Understand how the framework is built

Select **How it is built**. Three cards explain it with a real competency:

1. **Someone names the skills that define it**: a handful chosen by hand.
2. **The catalogue works out the rest**: Engage looks at the courses that teach those skills, and adds what else they teach.
3. **It checks itself every night**: new courses are picked up; skills you removed stay removed; named skills are never overwritten.

What the catalogue can teach rates each competency **Well served**, **Partly served** or **Poorly served** by how many LinkedIn Learning courses teach its defining skills. A poorly served competency cannot be closed with LinkedIn content however it is recommended.

Skills and analytics

For HRDU · **Capability & Skills** › **Skills & Analytics** in the menu

The institution's skills picture: which skills Wits holds, where they sit, where to invest, and the campaigns that ask staff to close a gap. The date pill **As at** says when the learning activity was last collected.

Read the skills picture

The page is long. Each panel answers one question.

Panel	What it tells you
What every member of staff is expected to have	For each Tier 1 competency, how many measured staff sit at each level. Tier 1 needs no target: it is expected of everyone by definition.
The shape of it	The share of staff with any evidence at all on each Tier 1 competency. It counts people who have started, not people who are proficient.
Where to invest	Skills ranked by how worth spending on they are (see below).
Campaigns	What you have asked of staff, and how far each ask has got.
Movement	Learners, completions and skills evidenced, per nightly collection. It is a daily rate, not a running total; a gap is a night nothing was collected.

Panel	What it tells you
Where each skill sits	The skills the framework leans on most, against job families: the share of each family holding each skill.
Capability by job family	Each family's average strength on each Tier 1 competency. Families marked inferred were worked out from courses.
Capability risk	Concentration: skills the framework values that only one or two people hold. Retirement: skills whose holders are within five years of 65. Only counts are shown, never an age or date of birth.
Engagement	Everyone with activity, by how many skills their finished courses evidence: none, 1 to 4, 5 to 14, or 15 and more. Started, not finished anything is the group a nudge would move furthest.
Development plans	Progress on the goals staff have set, as a share of goals that exist, not of the workforce.

GOOD TO KNOW

Retirement can only see staff whose date of birth reached Engage through onboarding. An empty list there means "not yet measured", not "safe".

Find where to invest

Where to invest ranks skills by a Priority figure. Three things are multiplied:

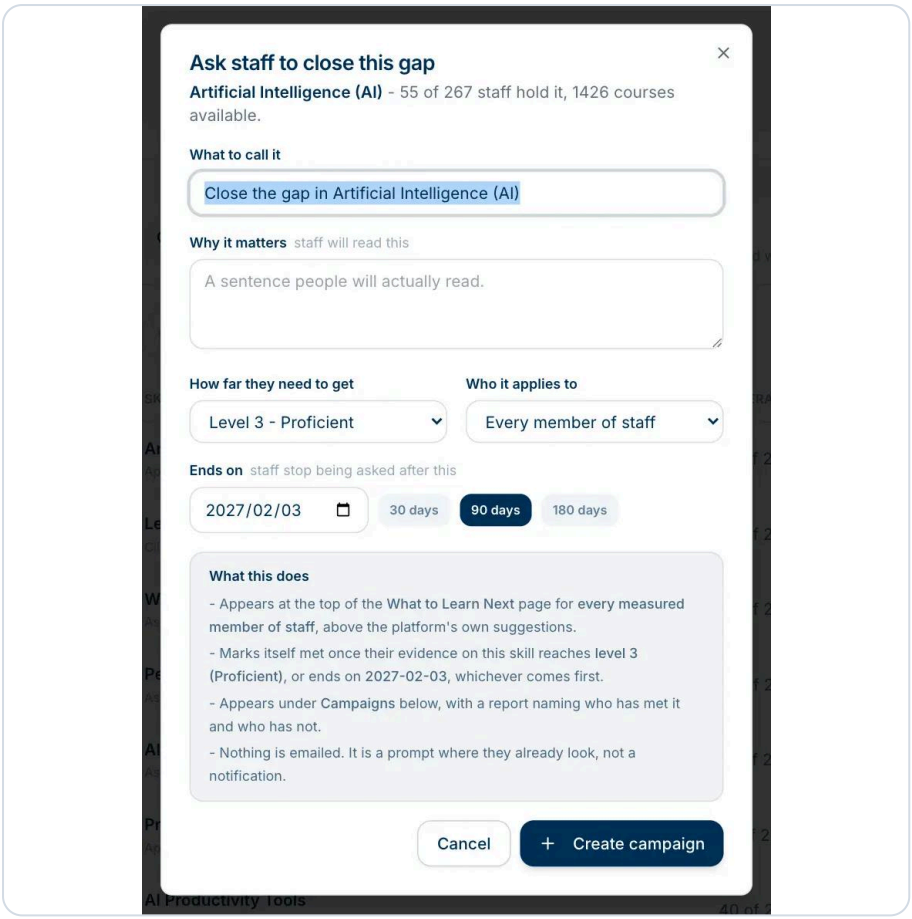
- how much the framework leans on the skill (its weight added up across every competency);
- the share of staff who do not hold it;
- how many catalogue courses teach it, on a scale that flattens out, so 100 courses does not count ten times as much as 10.

The top skills matter most, are missing most widely, and already have courses Wits licenses. No price enters this. A skill no course teaches scores nothing here, however real the gap: look for it under Poorly served on the framework instead.

Ask staff to close a skills gap

A campaign asks a group of staff to build one skill to a level by a date.

1. In Where to invest, find the skill and select Campaign on its line.
2. Check What to call it, and write Why it matters. Staff will read this.
3. Choose How far they need to get (level 1 to 5) and Who it applies to: every member of staff, or one job family.
4. Set Ends on, or select 30 days, 90 days or 180 days.
5. Read What this does, then select Create campaign.



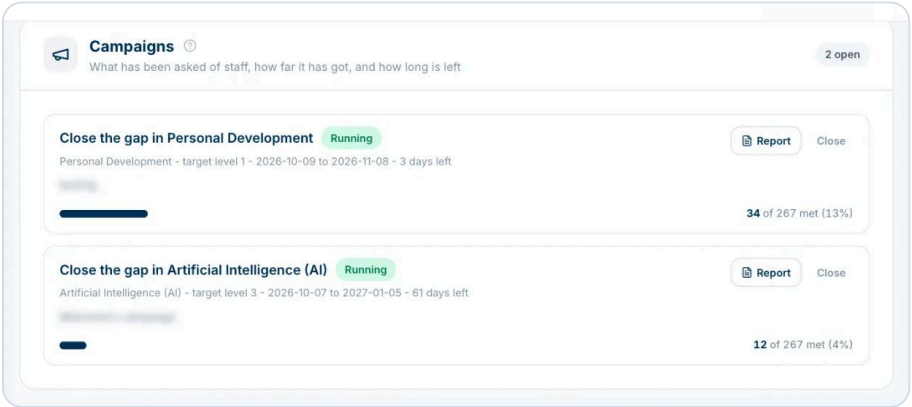
The form says how many staff already hold the skill and how many courses teach it, and spells out what happens when you create the campaign.

What staff see: the campaign appears under **Asked of you** on their **What to Learn Next** and **Learning Overview** pages, above Engage's own suggestions. Each card shows your reason, the end date and the shortest course they have not yet taken. Nothing is emailed. After the end date, staff stop seeing it.

A person meets the campaign when their evidence on the skill reaches four fifths of the target level in units. In practice: one course for level 1, two for level 2, three for level 3, four for level 4 or 5.

Follow up a campaign

The **Campaigns** panel lists every campaign with its status, dates, days left, and how many staff in scope have met it.



Each campaign shows its skill, target level, dates, days left and how many have met it. **Report** names who has and has not.

1. Select **Report** on a campaign.
2. The report opens on **Have not**, closest to meeting it first: the people a nudge would move. Switch to **Met it** or **Everyone**, or search by name or job family.
3. Select **Done** to close the report.

A campaign past its end date shows **Past its end date** in red. Staff no longer see it, but it keeps counting anyone who meets the skill. Select **Close** (or **Close this campaign** in the report) to stop it. Closing is immediate and has no undo.

See the people behind a figure, and set their job family

1. In **Capability by job family**, select a figure, or a family's name. A page opens listing everyone Engage places in that family.
2. Filter by **At half strength**, **Started** or **Nothing yet**. With one competency chosen, each person shows what they are missing.
3. To correct someone's family, use **Set job family...** on their line. Choose **Move to** another family, or the same family marked **(confirm this guess)**.

The change is saved at once. A family set by HRDU shows **Assigned by staff development** and is never overwritten by Engage's overnight guess. Select **Back to the matrix** to return.

Bring in today's learning

Engage collects LinkedIn Learning activity every night. To see this morning's completions without waiting, select **Refresh now** in the Tier 1 panel. A note beside it reports progress, ending **Up to date**.

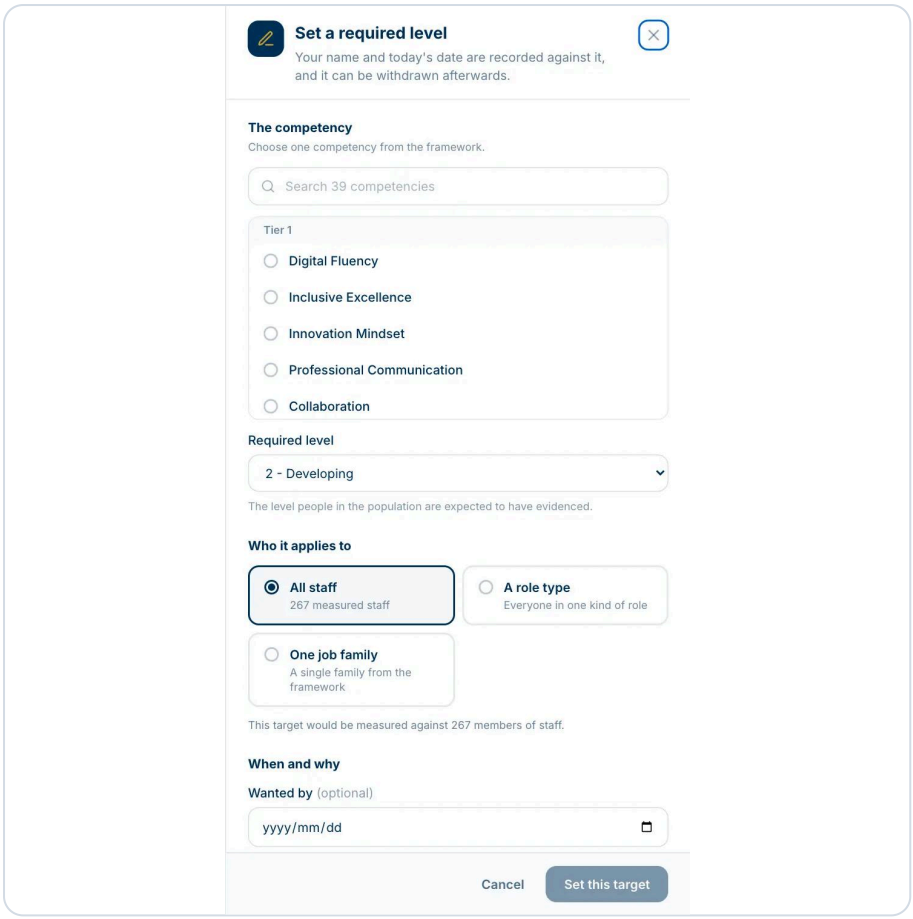
Demand targets

For HRDU · **Capability & Skills › Demand Targets** in the menu

The framework says which competencies are expected of whom; a demand target says at what level. Wits has published no such levels, so until HRDU sets one, Engage states no demand beyond Tier 1.

Set a required level

1. Select **Set the first target** or **Set another target**. A form opens from the right.
2. Under **The competency**, search and choose one.
3. Choose the **Required level**.
4. Under **Who it applies to**, choose **All staff**, **A role type** or **One job family**, then which one. Each choice shows how many measured staff it reaches.
5. Optionally set **Wanted by** and say **Why this level**.
6. Select **Set this target**.



Before you save, the form says how many staff the target would be measured against. A population of nobody is worth setting only if staff will be placed in it.

Your name and the date are recorded on the target. Staff with no job family sit outside every family or role-type target; the form says how many. Staff see each target that applies to them, and where their own evidence puts them, under **Skills & Competencies** › **What Is Expected of Me** on their staff dashboard.

Read the shortfall

The top figures count staff **Below Target**, those **One Level Short**, and **Catalogue Time**. Below them, **Where each population sits against its target** splits each target's people four ways: **Meets it**, **One level short**, **Some evidence** and **No evidence**.

- A person meets a target when their level (worked out as in Read a competency level) reaches the required one.
- The shortfall is a count of people, never a percentage. A person under two targets counts twice.
- **One level short** is the group a development plan can move.
- **Catalogue Time** assumes one course per person short, at the median length of the courses that teach the competency. It is time, not money: Engage holds no costs.

Order the list by **Most short**, **Closest**, **Furthest** or **Smallest population**. **Catalogue can teach it** hides targets no course serves.

Withdraw or reinstate a target

Select **Withdraw** on a target. It stops counting at once, with no confirmation, but is kept. To bring it back, choose **Withdrawn** above the list and select **Reinstate**.

Pathways and careers

For HRDU · **Pathways & Careers** in the menu

Build learning routes, write down what a step up requires, look at any person's progression, and record who is being developed for a critical capability.

Build a development pathway

A pathway is an ordered route of LinkedIn Learning courses: prerequisites, core modules and a capstone (the piece that pulls the route together at the end).

1. Open **Pathways & Careers** › **Pathways** and select **Author a pathway**.
2. Fill in **Name**, **What it is for** and **Who it is for** (all staff, or one job family), then select **Create draft**.
3. On the new pathway, select the button showing its number of steps (**0 steps** at first), then **Add a step**. A form opens from the right.
4. Choose **Where it sits**: **Prerequisite**, **Core module** or **Capstone**.
5. Choose **A catalogue course** and type three letters or more to search for it, or **An activity Wits runs itself** and name it.
6. Optionally choose the **Competency it builds** and add a **Note**, then select **Add as prerequisite**, **Add as core module** or **Add as capstone**.

Each step goes at the end of its group. Use the arrows to move a step earlier or later, and the bin to remove it; these act at once. The **Who it is for** menu on an open pathway also saves as soon as you change it.

GOOD TO KNOW

An activity Wits runs itself, such as a presentation or secondment, never counts towards anyone's progress, because nothing reports it finished.

Publish, unpublish or delete a pathway

A draft is visible only to HRDU. Select **Publish** to show it to staff, or **Unpublish** to take it back to draft. Staff see published pathways on their **Development Pathways** page, with how many course steps they have completed. Nobody is told when you publish. In your view, a course step is marked as a catalogue course rather than with any one person's progress.

To delete a pathway, select **Delete** on it, then **Delete it** to confirm, or **Keep** to stop.

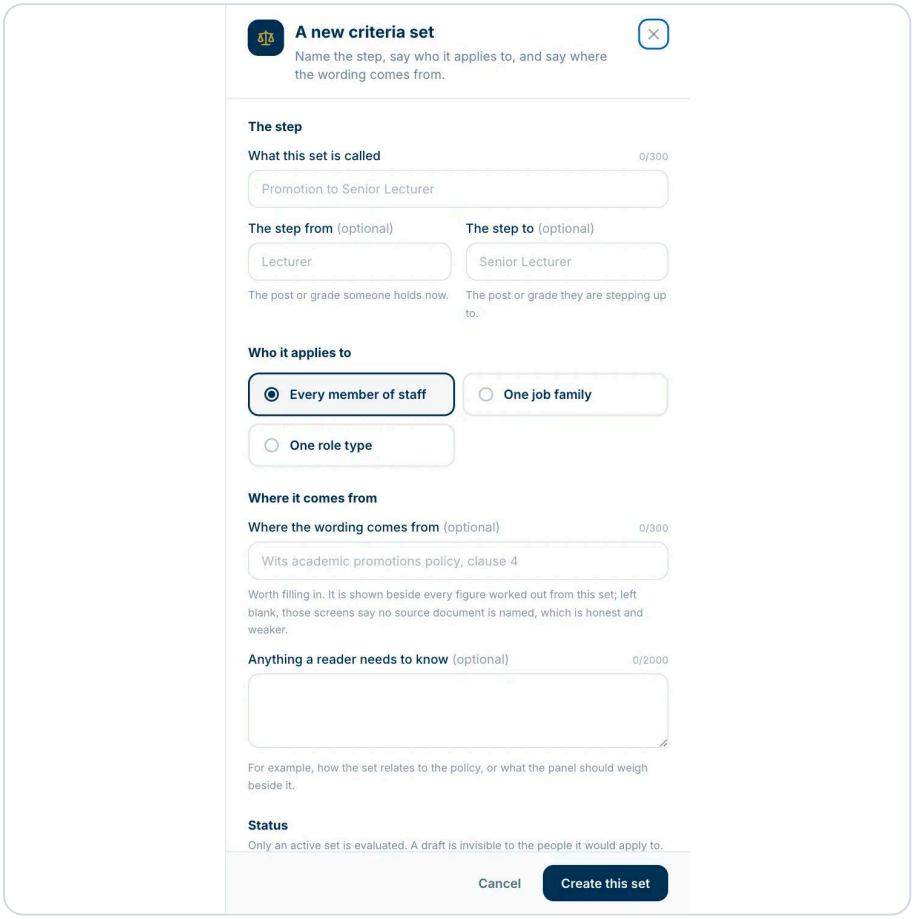
TAKE CARE

Deleting removes the pathway and all its steps for good, even if it is published: staff following it no longer see it. Unpublish instead if you may want it again.

Write the requirements for advancement

A criteria set is what Wits requires for one step up, such as Lecturer to Senior Lecturer. Engage then measures each person in scope against it, and says where it cannot.

1. Open **Pathways & Careers › Advancement Criteria** and select **New criteria set**.
2. Fill in **What this set is called**, and optionally **The step from** and **The step to**.
3. Under **Who it applies to**, choose **Every member of staff**, **One job family** or **One role type**.
4. Fill in **Where the wording comes from**, such as the policy and clause. It is shown beside every figure worked out from the set.
5. Choose a **Status**: **Draft**, **Active** or **Retired**. Only an active set measures anyone.
6. Select **Create this set**.



Name the step, say who it applies to and where the wording comes from. Leave it as a draft until the wording is what Wits would stand behind.

Add a requirement to a set

1. On the set, select **Requirements**, then **Add a requirement**.
2. Write the requirement in the words Wits uses for it.
3. Choose **Essential** (counts in the figure) or **Desirable** (reported, never in the figure).
4. Under **What the platform should measure**, choose one of nine kinds: a competency at a level, a number of competencies, evidenced skills, completed courses, hours of learning, a qualification at an NQF level, a number of qualifications, months of service, or **Something the platform cannot measure**. Fill in the fields that appear.
5. Select **Save this requirement**.

Use **Something the platform cannot measure** for a publication record, teaching evaluation or referee's view. It is shown to the panel but kept out of every figure. Qualifications and months of service come from what staff lodge themselves.

An active set appears at once on the career progression page of everyone in scope, and on their printed evidence portfolio. Nobody is told. Change a set or requirement with **Amend**.

To delete a set or a requirement, select its **Remove**, then **Remove it** to confirm, or **Keep** to stop.

> **TAKE CARE**
> Removing cannot be undone, even on an active set. Removing a set removes all its requirements, and staff it applied to no longer see a readiness figure against it.

Read a person's career progression

1. Open **Pathways & Careers › Career Progression**.
2. Under **Whose progression to open**, search and select a person.
3. If they have not chosen a target job family, pick one under **Target job family**. This changes only your view; only the person can set their own target.

The page then shows:

- **Position against the requirements for advancement**: **Essential requirements met** is met ÷ (met + not met), over the essential requirements Engage can measure. Requirements it cannot measure, and desirable ones, are listed but never enter the figure. A requirement met on a qualification nobody has checked is marked **Rests on an unchecked claim**.
- **Where this person stands now**: their job family, position, start date at Wits and lodged qualifications.
- **The competencies {family} expects**: each competency's level, the skills still missing, and **Courses that would close this**.

If no active criteria set applies to the person, there is no readiness figure at all, rather than a zero. The figure is a measurement, not an eligibility decision or a ranking. Staff see the same page about themselves under **My Career Progression**.

Prepare a succession slate

A succession slate records a capability HRDU judges critical, and the people being developed to hold it. It is recorded against a capability, not a post. Nobody named on a slate can see it, and nothing on this page tells anyone anything.

1. Open **Pathways & Careers › Succession Slates** and select **Record a slate**.
2. Under **The capability**, search for a competency or a skill. Each option says how many people have evidenced it.
3. Write **Why is this capability critical?**. This sentence is the whole justification; Engage does not rate criticality.
4. Optionally set **Look at this again on**, then select **Record this slate**.

Name a successor and track them

1. Select the slate under **Capabilities with a slate**. Its details open below.
2. In **Everybody the platform has a record for**, choose **Some evidence**, **At Advanced** or **Everybody**, and select a person. You cannot name yourself.

3. Write **Why this person?** and select **Name them on this slate**. The person is not told; that conversation is yours.
4. As they develop, select **Mark as in development** or **Mark as holds the capability**. **What would close this** lists one course per missing skill.

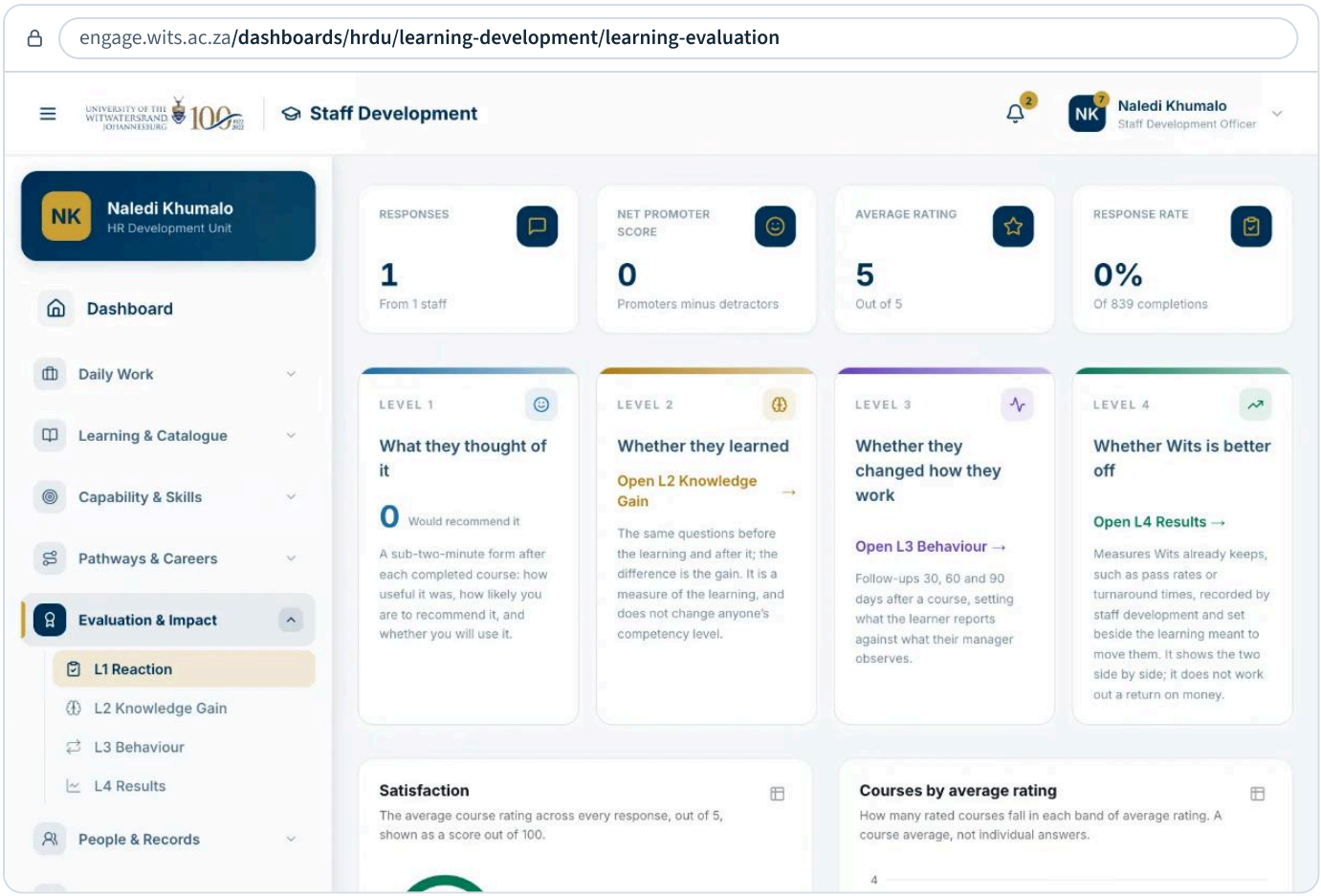
Each person shows how many of the capability's defining skills they have evidenced. It is not a readiness score. **Take off the slate** asks you to confirm, then removes them and why they were named. **Close this slate** asks for an optional reason: select **OK** to close it, or **Cancel** to leave it open. Find a closed slate again under **Closed**.

Evaluation and impact

For HRDU · **Evaluation & Impact** in the menu

Four levels of evaluation, each asking a harder question about the learning. Each needs something from staff, managers or HRDU before it shows a figure.

Menu item	The question	What it needs first
L1 Reaction	What did staff think of the course?	Staff rating their finished courses on **Rate My Courses**.
L2 Knowledge Gain	Did they learn anything?	HRDU publishing a short paper of questions; staff sitting it before and after the learning.
L3 Behaviour	Are they using it at work?	Answers at 30, 60 and 90 days, from the learner on **Did It Stick?** and from a manager or HRDU.
L4 Results	Is Wits better off?	HRDU defining organisational measures and typing in their figures, period by period.



L1 opens with the four levels side by side. The level 2, 3 and 4 cards link to **L2 Knowledge Gain**, **L3 Behaviour** and **L4 Results**.

Read what staff thought of a course (L1)

When staff finish a LinkedIn Learning course, it waits on their **Rate My Courses** page for a rating. Nobody is prompted. The form asks how useful it was (1 to 5 stars), how likely they are to recommend it (0 to 10), whether they will use it, and for a comment.

- **Average Rating**: the mean star rating.
- **Net Promoter Score**: the share who scored 9 or 10 minus the share who scored 0 to 6, among those who answered that question.
- **Response Rate**: ratings as a share of completed courses.
- **Will apply it**: the share who answered Yes to "Will you use this in your work?"

Figures appear from the first rating. **Lowest rated, needs attention** and **By course** show each course with its number of responses; treat a course with one response as one opinion. **By course** lists up to the 200 courses with the most responses, and says so when more have been rated. The page is read-only.

You see each course's summary, never one person's rating, name or comment. Staff are told this on their own page.

Measure knowledge gain (L2)

A knowledge check is a short paper sat once before the learning and once after, with the same questions. The gain is the difference.

1. Open **Evaluation & Impact › L2 Knowledge Gain** and, under **Assessments**, select **Author an assessment**.
2. Fill in **Title**, **Who is it for** (everybody, or one job family) and **Why it exists**, which staff read before they sit it.
3. Under **What it is about**, choose **Competency**, **Skill** or **Course**, then search and choose one.
4. Add questions with **+ Multiple choice** or **+ True or false**. Mark the correct option on each.
5. Select **Save and publish**, or **Save as a draft** and publish later with **Publish**.

A published paper appears at once on the **Check My Knowledge** page of the staff it is for. Until anyone sits a paper, **Edit** reopens it in the same form, and **Delete**, then **Delete it**, removes it. Once anyone has sat it, its questions are locked and it can no longer be deleted. To change it then, select **Retire** and write a replacement; staff who sat only the first part then see it as withdrawn.

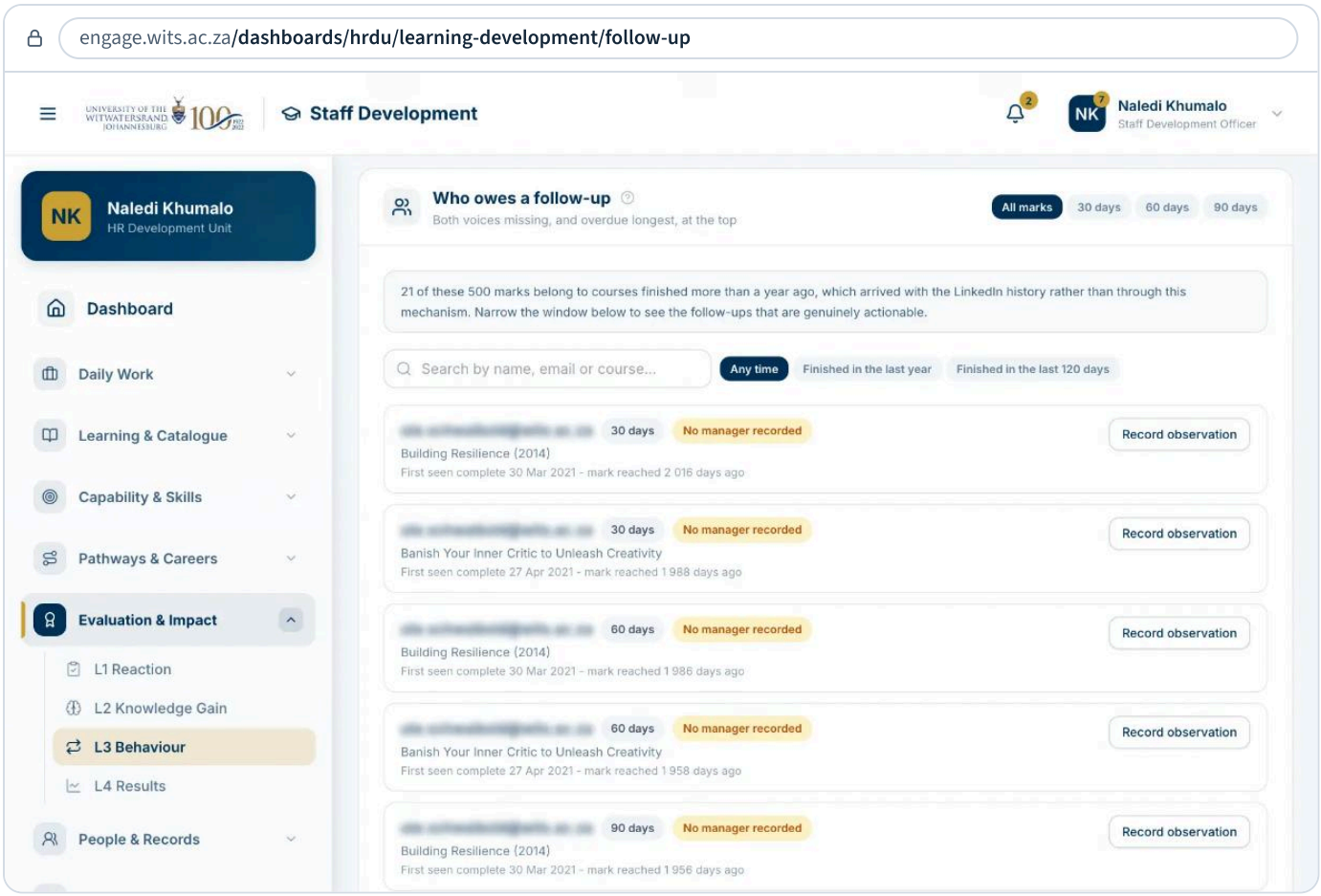
- Score = correct answers ÷ questions × 100. Gain = after − before, in percentage points.
- The second sitting falls due seven days after Engage first sees the person finish learning after their first sitting. More than four weeks past due, it is marked lapsed.
- Each morning, Engage reminds people who owe the second sitting, up to three times, a week apart, if they have a sign-in account. The **Reminders** column shows whether reminders have gone out.

GOOD TO KNOW

A knowledge check never changes anyone's competency level. **Evidence beside the competency level** shows the two side by side, with how much of the competency the papers actually cover.

Check whether learning is being used (L3)

Thirty, sixty and ninety days after Engage first sees a course finished, a follow-up falls due. Two voices answer it separately: the learner on their **Did It Stick?** page, and an observer (their manager, or HRDU). Nothing is sent at 30, 60 or 90 days; the due list is worked out each time the page opens. **Who owes a follow-up** lists every mark still missing an answer: the learner's, the observer's, or both. **Self-report in** and **Observed** show which is already in, and a mark leaves the list once both are.



Narrow to **Finished in the last year** or **Finished in the last 120 days**: much of the list is old LinkedIn history, not a backlog anyone created.

- To record what you have seen yourself, select **Record observation**, answer **Is this person applying what the course covered?** (**Routinely**, **Occasionally** or **Not yet**), add what you observed and what got in the way, and select **Record observation**. The learner sees your answer on their own page. **Revise observation** opens with what was recorded, so you can change it.
- Where a manager is recorded, **Ask their manager** sends them a request at once. It waits on the manager's **My Team** page; nothing is emailed. **Withdraw** cancels it.

Self-report rate and **Manager response rate** are answers as a share of follow-ups due. **The two voices agree** counts the marks where both answered the same. The two voices are never averaged: a manager seeing no change where the learner reports routine use is the finding. An observation can only be asked of a manager once a reporting line is recorded (see Record a reporting line).

Put learning beside organisational results (L4)

Engage measures no organisational outcome of its own, and holds no training costs, so it works out no return on investment. L4 puts a measure Wits tracks beside the learning meant to move it, over the same periods, for you to judge.

1. Select **Define an indicator**. Fill in **Name**, **What it measures**, **Unit**, **Kind of unit**, **Which direction is good** and where the figures come from. Select **Define it**.
2. Select the indicator, then **Record a reading**: the period (**From** and **To**), the figure and its source. Select **Record it**.
3. Select **Link learning**, choose a competency, library, campaign, skill or all learning, say why it was meant to move the measure, and select **Link it**.

With two readings or more, the indicator's chart appears, with the linked learning (completions, active learners, hours viewed) for each period beside it. Two lines moving together does not show that one caused the other. **Correct** on an indicator changes its definition and leaves the readings as they are.

To fix a reading typed wrongly, select **Correct** on its line in the indicator's table of readings, change it, and select **Save the correction**. Who first entered it is kept.

To delete an indicator, select **Remove**, then **Remove it** to confirm, or **Keep** to stop. The question says how many readings and links go with it.

TAKE CARE

Removing an indicator deletes it with all its readings and links, and cannot be undone.

People and records

For HRDU · **People & Records** in the menu

Qualifications staff declare, who reports to whom, each manager's team, and the contributions staff record.

Check a qualification

Staff lodge their own qualifications and posts held on their **My Qualifications** page. Wits sends Engage no qualifications, so the **Qualifications Register** starts empty and fills only as staff add records. Every entry reads **not checked** until HRDU checks it against a certificate.

1. Open **People & Records › Qualifications Register**. **Waiting to be checked** lists people with entries not yet checked, most outstanding first.
2. Select **Check records** on a person. Their evidence portfolio opens.
3. On each qualification or post, select **Checked** if the certificate matches. If it does not, select **Query**, say what needs looking at, and select **Send the query**.

The entry then reads **Checked by** your name, or **Queried** with your reason, everywhere it appears, including the person's own page. A query also sends the person a notification; a check tells nobody. If the person changes a checked entry, it returns to not checked. You cannot check your own record: Engage says so, and a colleague must.

GOOD TO KNOW

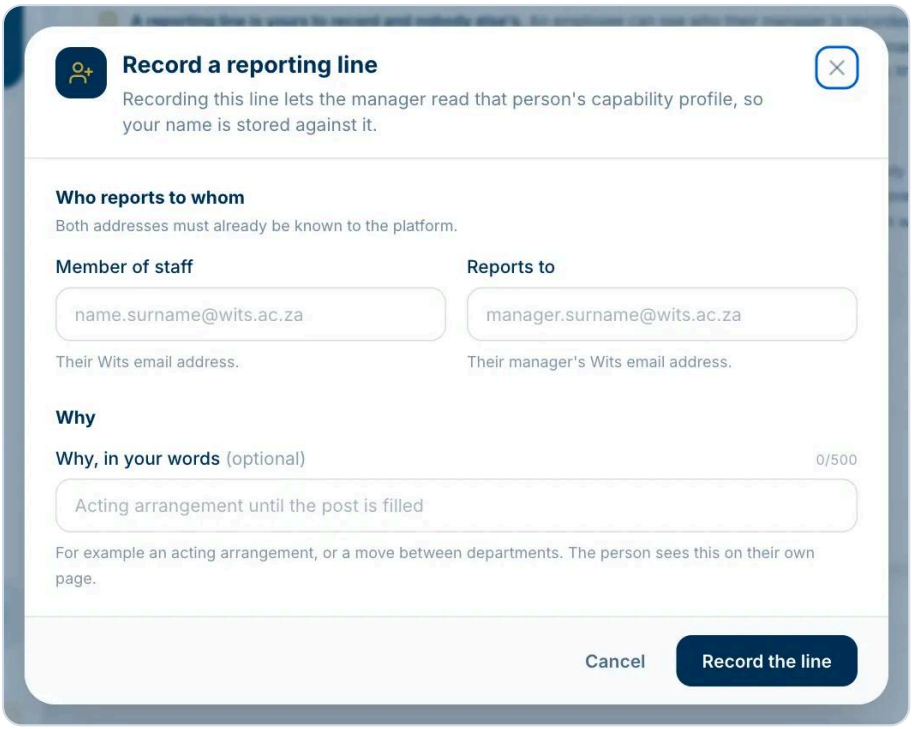
Changed your mind? **Undo the check** or **Withdraw the query** returns the entry to not checked.

Record a reporting line

Wits supplies no reporting lines to Engage, and Engage never guesses one. A line lets the manager read that person's capability, see their team, and be asked for L3 observations. An employee can see who their manager is recorded as and flag it as wrong, but cannot set it.

1. Open **People & Records › Reporting Lines** and select **Record a line**.
2. Type the **Member of staff** and **Reports to** Wits email addresses. Both must already be known to Engage.

3. Optionally say **Why, in your words**. The person sees this on their own page.
4. Select **Record the line**.



Your name is stored against every line you record.

If the person already has a manager, the form names them and says that saving ends that line today; the ended line stays in the history. The new manager has access at once. Nobody is notified. Two other ways in:

- **Nobody recorded as their manager** lists staff with no line; select **Record a manager**.
- **Suggestions** notices people in a department where you have already placed colleagues under one manager. Select **Review and record** to check it. Nothing is applied automatically.

Settle a disputed line, or end one

When a person flags their line as wrong, everyone with the HR role is sent a notification. Flagged lines show **Disputed**, with the person's reason; choose **Disputed** above the list to see only those. A disputed line stays in force until you act.

- **Line is correct** clears the flag and keeps the line.
- **End it** ends the line at once, with no confirmation. The manager can no longer read the person's capability. Ended lines are kept under **Ended**.

Read a manager's team capability

1. Open **People & Records** › **Team Capability**.
2. Under **Choose a manager**, select **Open team**. Only managers with a recorded line appear.

You see the same grid the manager sees: each person against each competency, with **Their mean**. Switch between **Tier 1**, **Tier 2**, **Tier 3** and **Every tier**; a tier with no competency yet says so. Each cell is the person's strength on that competency, worked out as in Read a competency level. Grey means Engage has seen nothing, which is not the same as a

low score. The figures at the top count the people in the team, how many have any evidence on the tier shown, and the competencies shown. The page is read-only.

Managers open their own team under **My Profile** › **My Team** on their staff dashboard. Observations they have been asked for wait there. Staff see their own recorded manager under **My Profile** › **Who Manages Me**.

See the thought leadership staff have recorded

Staff record their own publications, talks, supervision and board seats on their **My Contributions** page. Nothing is imported. **People & Records** › **Thought Leadership** counts them by kind and by person; the titles stay with the person who wrote them. HRDU has nothing to do on this page. To record your own, use **My Contributions** on your staff dashboard.

Communities and mentoring

For HRDU · **Community & Mentoring** in the menu

A community of practice is a group of staff who share a practice. Knowledge transfer pairs someone who holds a skill with someone required to hold it.

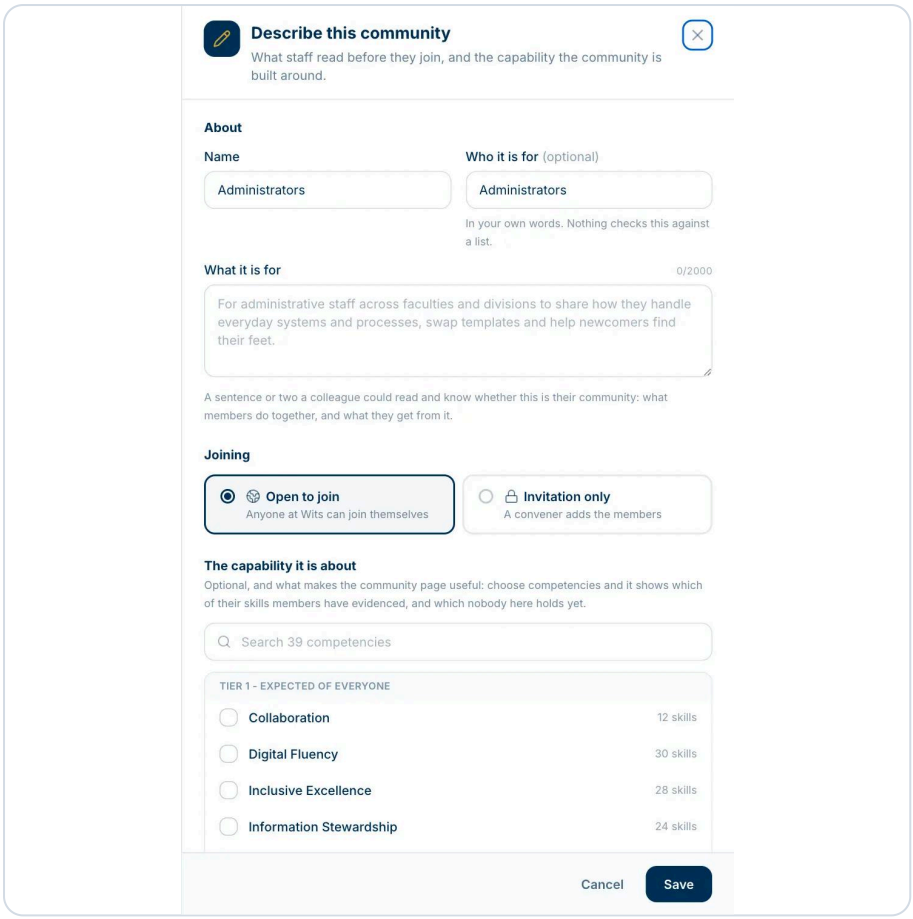
Start a community of practice

1. Open **Community & Mentoring** › **Communities of Practice** and select **New community**.
2. Fill in the form as in the next section, then select **Create the community**.

You become its convener (the person who runs it). Four communities come with Engage, named but not yet described: Administrators, HR teams, Leaders, and Learning and development practitioners.

Describe a community from its own page

1. Select **Open** on a community. Its own page opens.
2. Select **Describe it**, or **Edit description** once it has one. A form opens from the right.
3. Under **About**, check **Name** and **Who it is for**, and write **What it is for**: a sentence or two so a colleague knows whether it is theirs.
4. Under **Joining**, choose **Open to join** or **Invitation only**.
5. Under **The capability it is about**, tick the competencies the community is built around.
6. Select **Save**.



What staff read before they join. Choosing competencies is what lets the community page show which of their skills members hold.

Everyone sees the new description at once. With competencies chosen, **What this group holds of its own subject** shows, for each one, how many of its skills at least one member has evidenced, and which nobody in the group holds. It describes the group, not anyone in it.

Add members and conveners

1. On the community's page, select **Add a colleague**.
2. Search by name, email or job family.
3. Select **Add as member** or **As convener**.

The person is added at once and is not told; the community simply shows as theirs. Under **Who is in it**, **Make a convener**, **Make a member** and **Remove** also act at once. A community must keep at least one convener. Staff join an open community themselves with **Join**.

HRDU can read every community's discussion, but can only post as a member, and cannot remove other people's posts. Only a post's author or a convener can.

Archive or reopen a community

On the list, select **Archive**. Its members and discussion are kept, but staff can no longer see or open it, members included. Tick **Include archived** to find it, and select **Reopen** to bring it back.

Pair a mentor with a learner

Community & Mentoring › **Knowledge Transfer** lists, under **Where knowledge could move**, each skill that someone has evidenced to Advanced and someone else is required to hold but has no evidence on. Advanced means 3.2 evidence units, level 4.

1. Select a skill. **The two ends of** the skill opens below.
2. Choose one person from **Has evidenced it** and one from **Required to hold it, nothing recorded**. Check each person's job family label: most are worked out from courses.
3. Select **Record a pairing**.
4. Optionally choose **Which requirement is this about?** and write a note, then select **Record this pairing as proposed**.

A match says only that two people are at opposite ends of one skill. Whether someone can teach, wants to mentor or has the time is not recorded anywhere; the pairing is your decision. Nobody is notified, but both people see the pairing and your note on their own **Knowledge Transfer** page, marked proposed. Staff cannot ask for a mentor in Engage; they are told to speak to HRDU.

Follow a pairing through

Under **Pairings on record**, select **It is running** once the pair has started. The movement figure is the learner's evidence units now, less what they had when paired. It does not prove the mentoring caused it: finishing a course alone moves it the same. **Close** asks for an optional reason: select **OK** to close the pairing, or **Cancel** to leave it running. A closed pairing cannot be reopened; propose a new one instead.

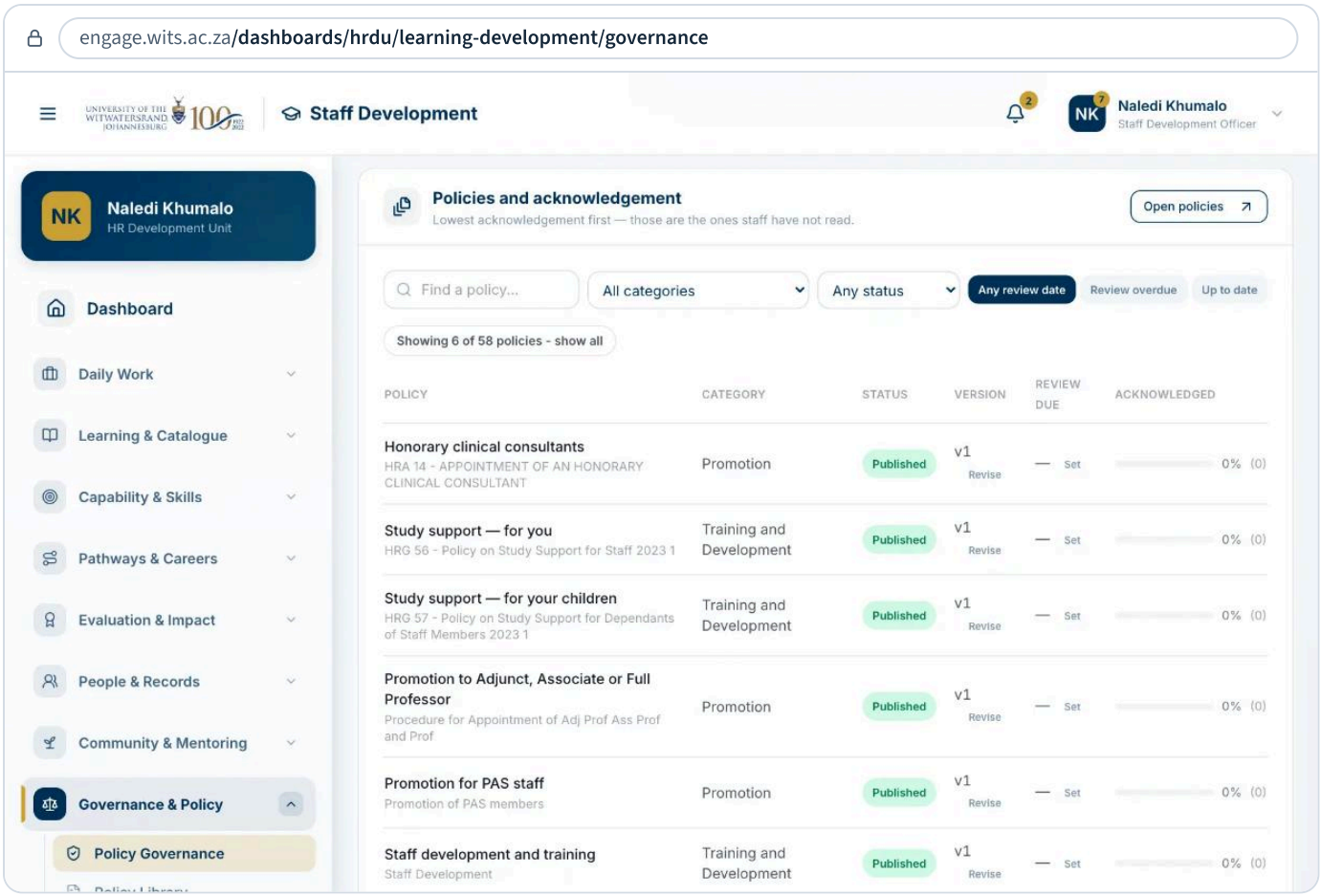
Policy governance

For HRDU · **Governance & Policy** in the menu

Which policies on staff development and promotion staff have acknowledged, and publishing a new version of one.

See which policies staff have acknowledged

Open **Governance & Policy** › **Policy Governance**. The page shows the policies in the Training and Development and Promotion categories, lowest acknowledgement first. Select **show all** to see every Wits HR policy in Engage.



Each policy shows its version, with **Revise** beneath it, and the share of staff who have acknowledged the current version.

A staff member acknowledges a policy by selecting **Mark as read** on it. The acknowledged figure is staff who acknowledged the current version ÷ all staff with an account. **Average acknowledgement** is the plain average of those figures across the policies shown.

Publish a revision of a policy

1. Select **Revise** beside a policy's version. A form opens under the policy.
2. To replace its wording, choose the new PDF under **New wording (PDF)**. Leave it empty to keep the current document.
3. Optionally set **Next review due**.
4. Read the warning, then select **Publish version** and the new number. **Cancel** closes the form and changes nothing.

The version goes up by one, and every member of staff with an account is sent a notice asking them to read the policy again.

TAKE CARE

A revision cannot be undone. Acknowledgement of that policy restarts at 0% and staff see **Mark as read** again. Earlier acknowledgements are kept as the record of who read the old wording. Only HR can attach a new PDF; HRDU can publish a revision of the same wording.

Set a policy's review date

In the **Review due** column, select **Set** (or **Change**), choose a date and select **Save**. Clear the date and save to remove it. The **Review overdue** and **Up to date** filters, the **Review date passed** figure and the review chart all use these dates; a policy with no date is in neither filter.

Open the policy library

Select **Open policies**, or **Governance & Policy** › **Policy Library** in the menu. It is the same library every member of staff sees: search, open a policy with **View**, **Download** it, or acknowledge it yourself with **Mark as read**.

Medical aid, retirement fund, banking and campus access

For the four teams that check what new staff submit during onboarding. Each chapter shows how to find what is waiting, check it and decide.

How the service queues work

For medical aid, retirement fund, banking and campus access staff

A new staff member completes each onboarding step, and what they submit lands in your team's queue. You open it, check it, and approve or reject it. The staff member gets a notification under the bell.

No queue has a button to ask for more information. To ask for something, reject the item and say in the note what is missing.

Queue	Note needed to reject	Can you change the decision?	Staff member is told
Medical aid applications	Yes	No. If they send it again, you decide again	Yes, with your note
Medical aid documents	Yes	Yes, review it again	When verified or rejected, with your note
Retirement fund applications	Yes	Yes	Yes, with your note
Banking details	Yes	Yes	Yes, with your note
Access cards	Yes	Yes	Yes, with your note
Parking permits	Yes	Yes	Yes, with your note
Library access	Not applicable	Yes: grant or withdraw	Yes

In the retirement fund, banking, access card and parking queues, nobody can decide their own request, and a request the staff member changes after a decision comes back to the queue for you to decide again.

Opening a medical aid application or a staff member's bank account is recorded, so there is a record of who looked at whose details.

Every service dashboard also has **Policies** › **Policy Library**: the same university policies all staff see. Search them, select `View` or `Download`, and select `Mark as read` once you have read one.

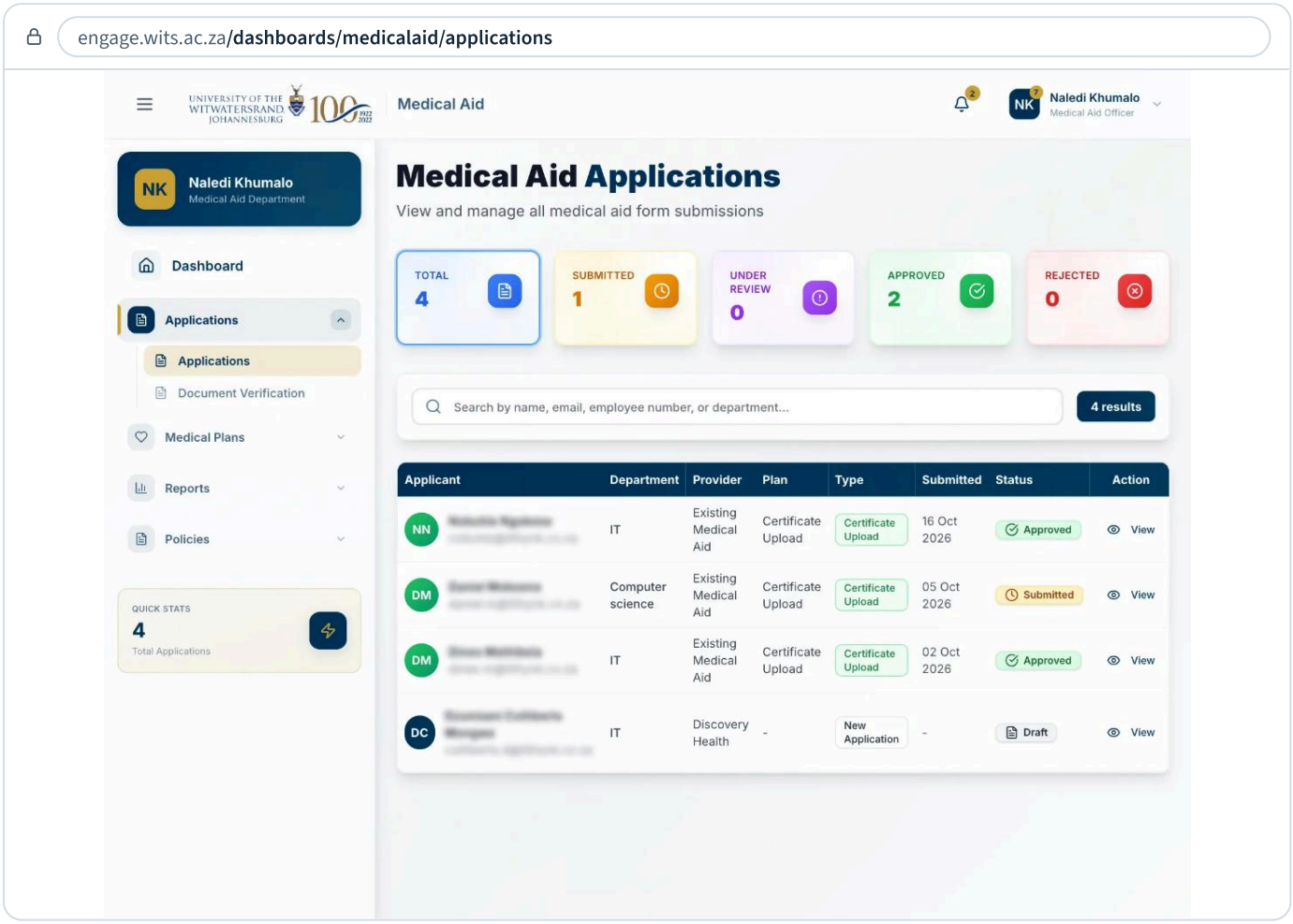
Medical aid

For medical aid officers · the `Medical Aid` dashboard

New staff either apply to join a medical aid offered through Wits, or upload a certificate showing they already belong to one. Both arrive as applications for you to approve or reject.

See which applications are waiting

1. Open **Applications › Applications**.
2. Select the **Submitted** card to list the applications waiting for a decision. **Under Review** lists any already being looked at.
3. To find one person, type a name, email, employee number or department in the search box.



Select a status card to filter the list. A certificate upload shows **Existing Medical Aid** as its provider and **Certificate Upload** as its type.

Status in the list	What it means
Submitted	Waiting for a decision. An application sent again after a rejection comes back as Submitted.
Under Review	Already being looked at. You approve or reject it in the same way.
Approved	Accepted. The staff member's medical aid step is complete.
Rejected	Turned down, with your note.

Status in the list	What it means
Draft	Started but not sent. There is nothing to decide yet.

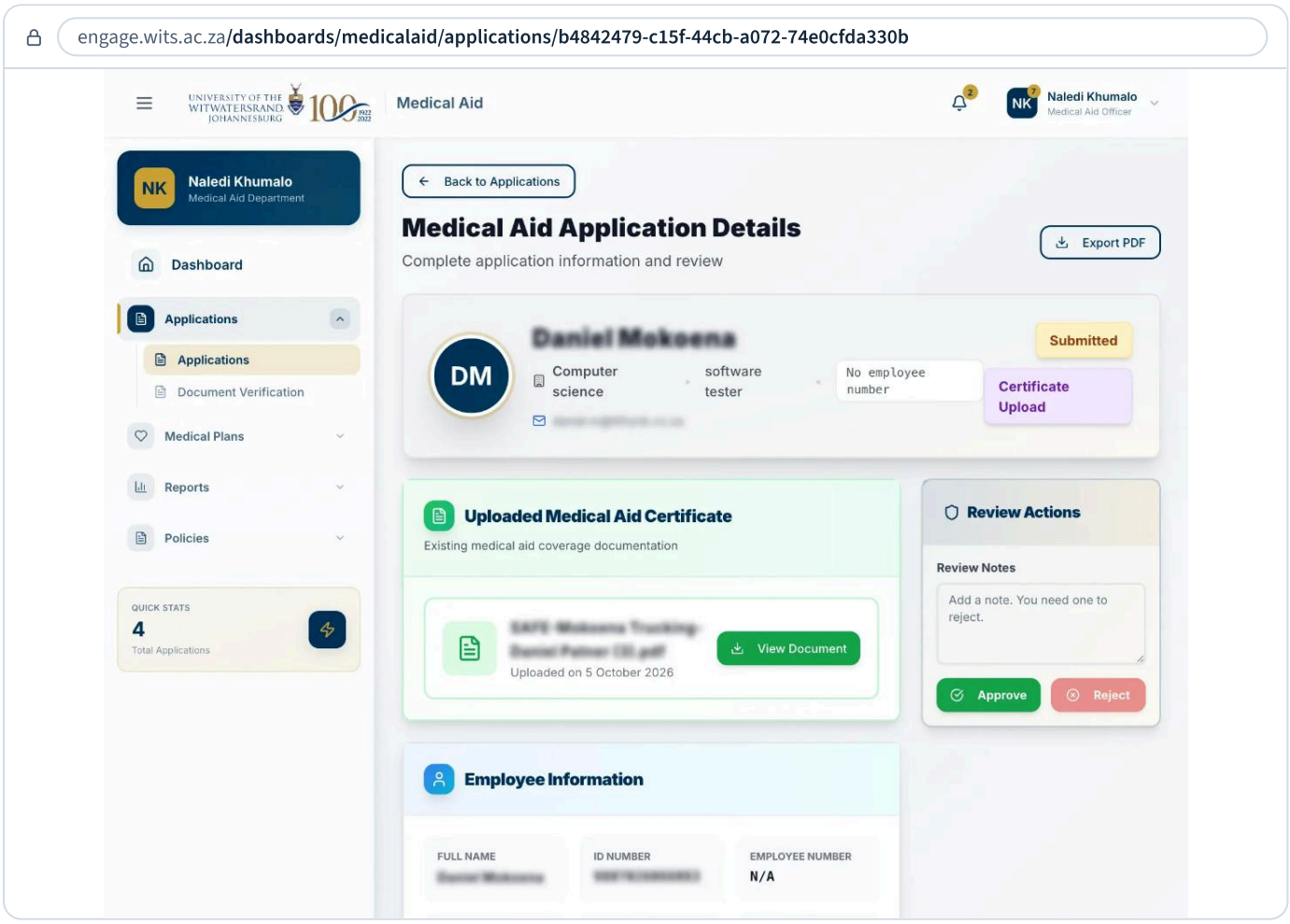
Check an application

Select **View** to open an application on its own page. The top shows the staff member's department and position, the status and the type of application.

- **A certificate upload** shows **Uploaded Medical Aid Certificate**. Select **View Document** to open the certificate in a new tab.
- **A full application** has four tabs: **Overview** (personal details and the chosen plan), **Dependants** (the spouse and children to be covered), **Banking** (the debit order account) and **History**.

Select **Export PDF** to save the application as a PDF form, for example to send to the medical aid.

The dashboard's **Onboarding** and **Form Submissions** tabs list the same applications. **Review** on a waiting application opens its own page. **View details** shows a summary of the form, with nothing to decide.



A certificate upload: open the certificate, then decide in **Review Actions**. **Reject** is pale until you write a note.

Approve or reject an application

1. On a full application, select **Start Review** under **Review Actions**. A **Review Application** window shows the main member, dependants and banking together. On a certificate upload the review boxes are already on the page.

2. Type in **Review Notes**. A note is optional when you approve. **Reject** stays unavailable until you write one.
3. Select **Approve** or **Reject**.
4. Check the question that appears, then select **Yes, approve** or **Yes, reject**. **Go back** leaves the application as it was.

The decision is saved, and **Review Actions** is replaced by the outcome, its date and your note. The staff member gets a notification that their application was approved or rejected, with your note.

- **Approved:** their medical aid onboarding step is marked complete.
- **Rejected:** they see your note and a **Resubmit** button. When they send the application again, or upload a new certificate, it comes back to you as **Submitted** and you decide again. Your earlier note shows above **Review Notes**.

> **TAKE CARE**
> Once you confirm, the decision cannot be changed. You cannot decide your own application: a colleague in the medical aid team must.

Schedule a consultation

Staff can ask for a consultation with a medical aid officer. Requests wait on the dashboard's **Appointments** tab, under **Pending Requests**. The list is empty until someone asks.

1. Select **Schedule Appointment** on a request.
2. Choose the date and time. Under **Meeting Type**, choose **In-Person** and type the **Meeting Location**, or **Virtual** and paste the **Virtual Meeting Link** (Teams, Zoom or Google Meet).
3. Select **Confirm Appointment**. The staff member gets a notification with the date, the time and the place, or that it is online.

After the meeting, select **Mark as Completed**, add **Consultation Notes** if you want to, and select **Complete Appointment**. The staff member is told, with your notes, and can go on to choose a medical aid.

Verify a medical aid document

Applications › Document Verification lists the medical aid certificates staff upload, newest first. A certificate replaced by a newer upload is not listed. The **SLA** column shows when each one is due: seven days after upload, after which it is marked **Overdue**. Once you verify or reject it, it shows **Reviewed**.

1. Select **Review** on a document.
2. Select **View Document** to open it in a new tab.
3. Under **Review Decision**, choose **Verify Document**, **Reject Document**, **Mark Under Review** or **Needs Attention**.
4. Type in **Review Notes** if you want to. To reject, you must.
5. Select **Submit Review**, or **Cancel** to leave it as it was.

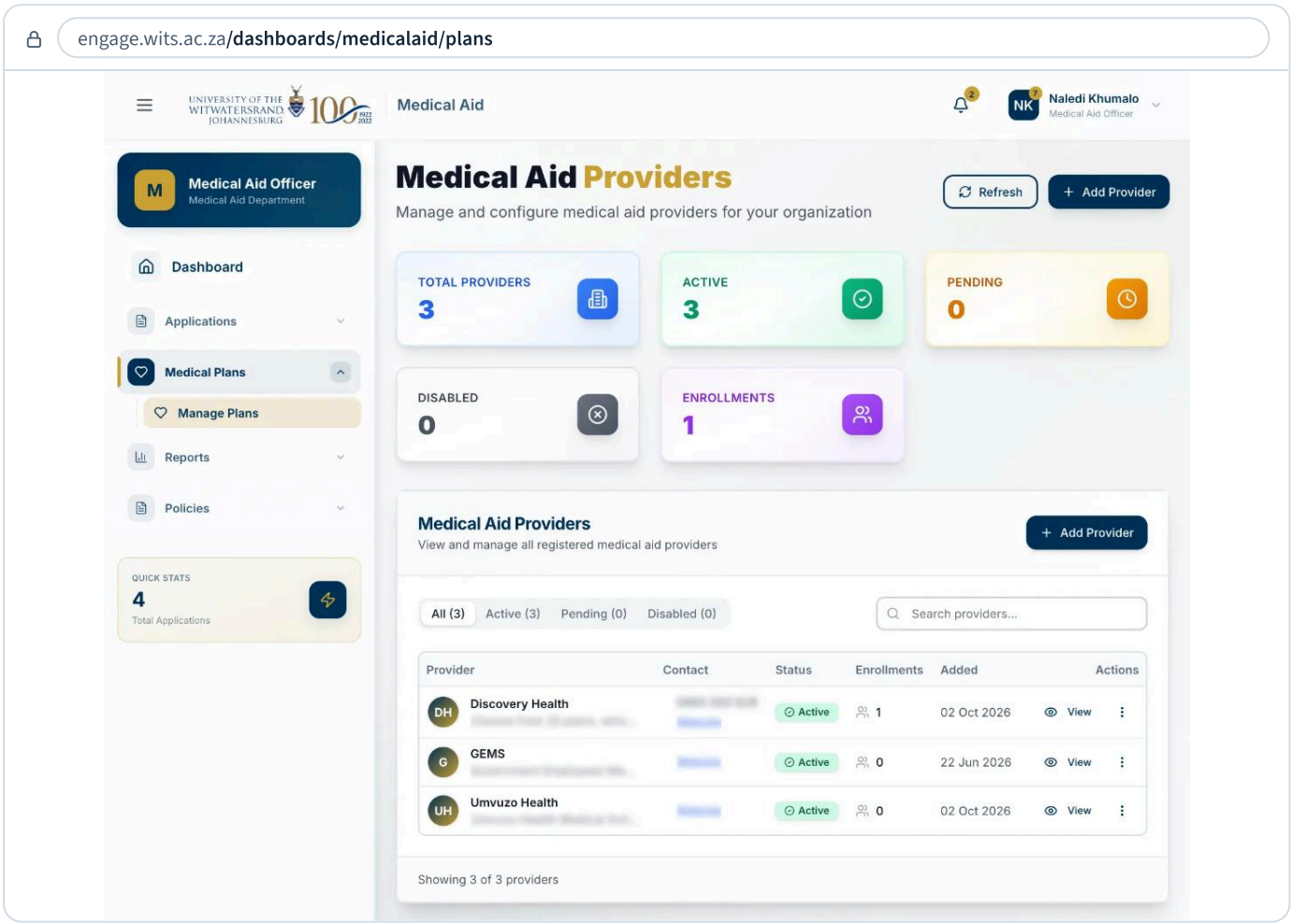
The staff member is told when a document is verified or rejected. **Mark Under Review** and **Needs Attention** change only the status here, and each has its own card and filter. You can review a document again at any time: your earlier note is in the box.

TAKE CARE

A note on a rejection is shown to the staff member. It is the reason they read in their notification and beside the document on their My Documents page, where they can send a corrected copy. A note on a verified document goes with their notification too, so write every note for the staff member to read.

Manage the medical aid providers

Medical Plans › **Manage Plans** lists the medical aids Wits offers. Only providers marked **Active** are offered to new staff during onboarding.



Each provider shows its contact details, its status and how many staff have applied to it.

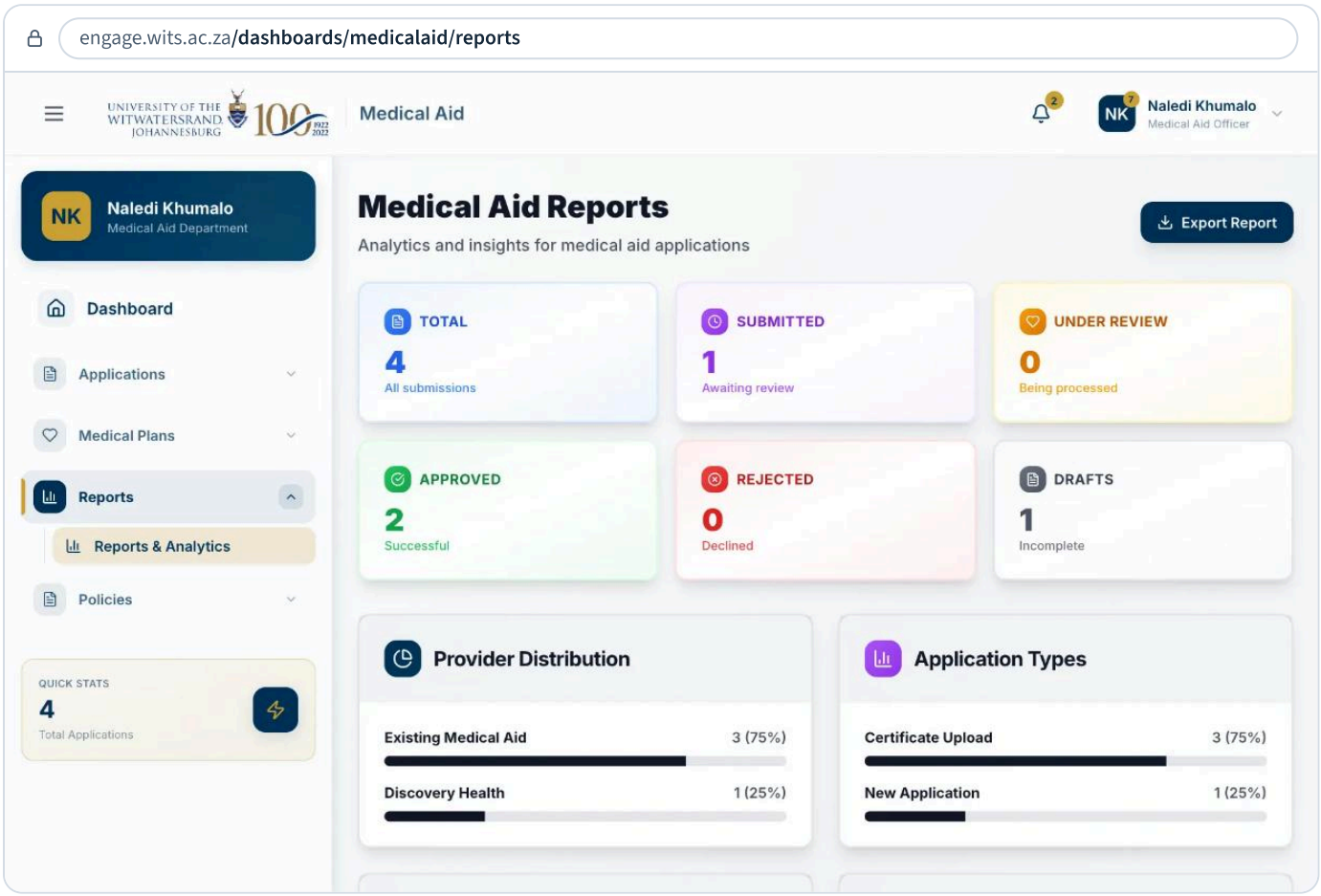
- **Add one:** select **Add Provider**. Only **Provider Name** is required. You can also set the **Status**, contact details, the **Application Instructions** staff will read, and the areas it serves. Select **Add Provider** at the bottom of the form to save it.
- **View one:** select **View** on its line.
- **Edit one:** select the three dots at the end of its line (**More actions**), then **Edit**. Make your changes and select **Save Changes**.
- **Stop offering one:** in the same menu, select **Disable**. The provider is no longer offered to new staff. On a disabled provider, **Make Active** offers it again.

TAKE CARE

Delete, in the same menu, deletes a provider for good after you confirm. A provider that staff have applied to may refuse to delete; disable it instead.

Read the medical aid reports

Reports › **Reports & Analytics** counts every application by status, and shows which providers and application types staff choose and how many applications were submitted, approved and rejected in each of the last six months. A certificate upload counts under **Existing Medical Aid** and **Certificate Upload**. Select **Export Report** to save the same figures as a spreadsheet file.



The counts cover every application, whatever its date.

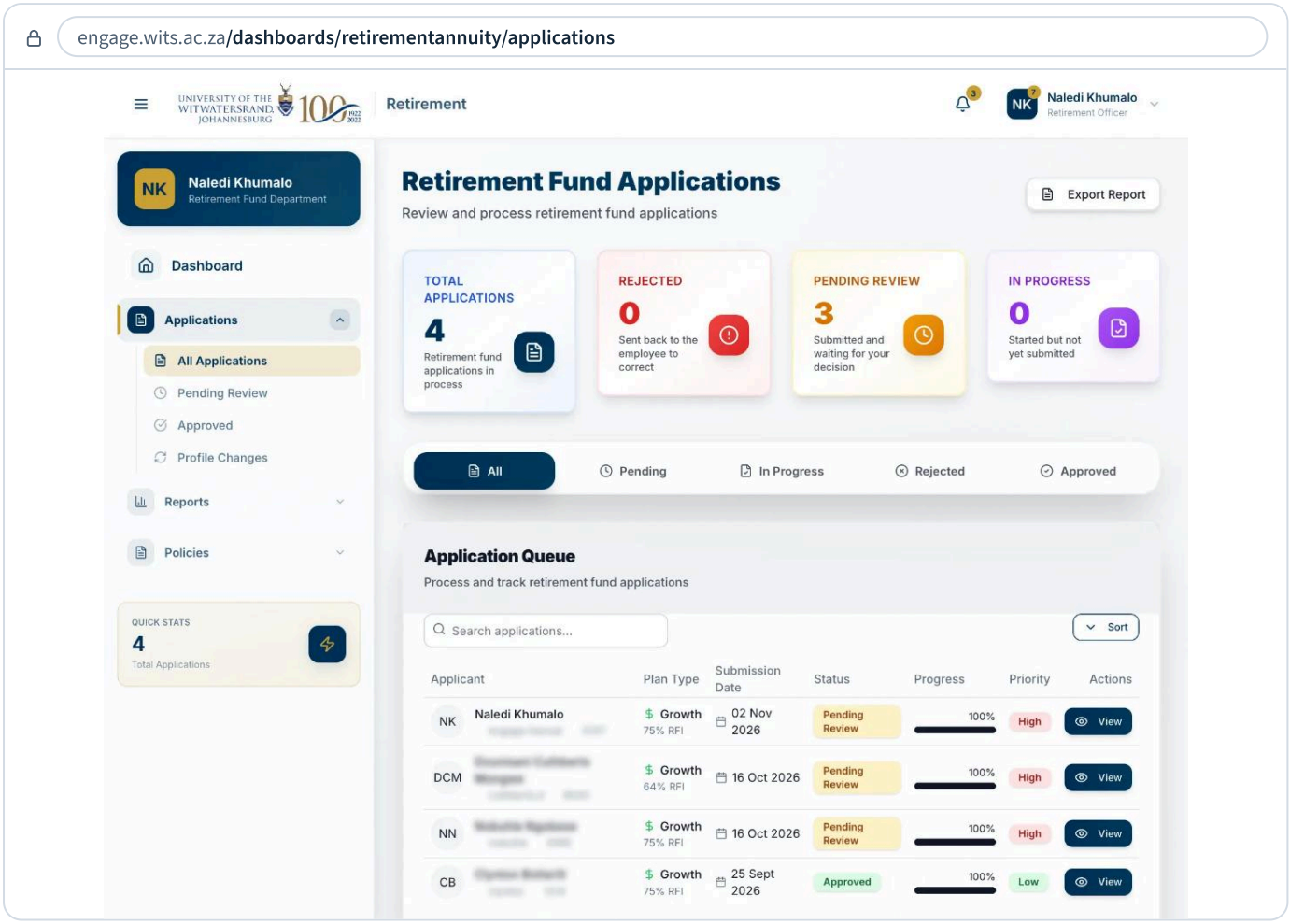
Retirement fund

For retirement fund administrators · the **Retirement** dashboard

New staff set up their retirement fund in four onboarding steps: their RFI percentage, death benefits, an investment profile and acknowledgements. RFI (retirement funding income) is the share of the total package on which retirement contributions are worked out. It is not the share of pay that is deducted.

See which applications are waiting

Open **Applications** › **All Applications**. The **Pending Review** card counts the applications waiting for you, and the **Pending** tab lists them.



Applications marked **Pending Review** are submitted and waiting for you.

Status	What it means
Pending Review	The staff member has submitted all four steps. Ready for your decision.
In Progress	Started but not submitted yet. **Progress** shows how many of the four steps are done.
Approved, Rejected	Your team has decided.

The tabs **Pending**, **In Progress**, **Rejected** and **Approved** each show one status. **Export Report** saves the list as a spreadsheet file.

GOOD TO KNOW

If a staff member changes their application after your team has decided it, it comes back as **Pending Review**, with your earlier note shown above the decision buttons. That includes a rejected application they have corrected.

Applications › **Pending Review** lists the same waiting applications, longest waiting first, with how many days each has waited. An application waiting more than 21 days is shown in red.

Check an application

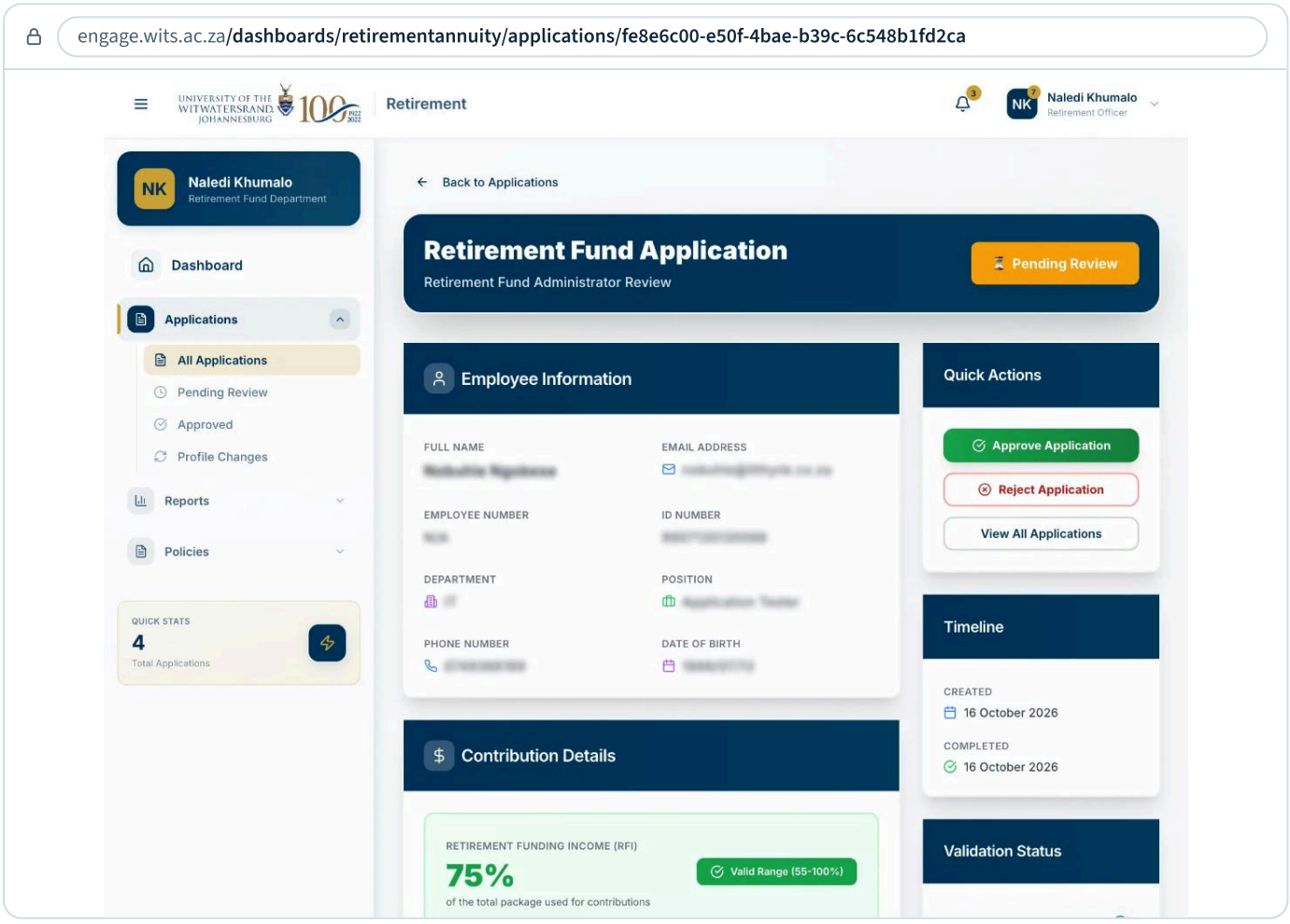
Select **View**. Check:

- **Contribution Details**: the **Retirement Funding Income (RFI)** percentage the staff member chose, with a badge saying whether it is in the **Valid Range (55-100%)**, and their **Investment Profile**.
- **Death Benefits & Dependents**: whether they chose a spouse's or children's pension.
- **Beneficiaries**, and **Validation Status** on the right.

A retirement fund application has no documents to open.

Approve or reject an application

1. Under **Quick Actions**, select **Approve Application** or **Reject Application**.
2. In the box that opens, type a note. It is optional when you approve. To reject, you must say what the staff member needs to change.
3. Select **Approve** or **Reject** to confirm, or **Cancel** to leave the application as it was.



The decision buttons are in **Quick Actions**, on the right.

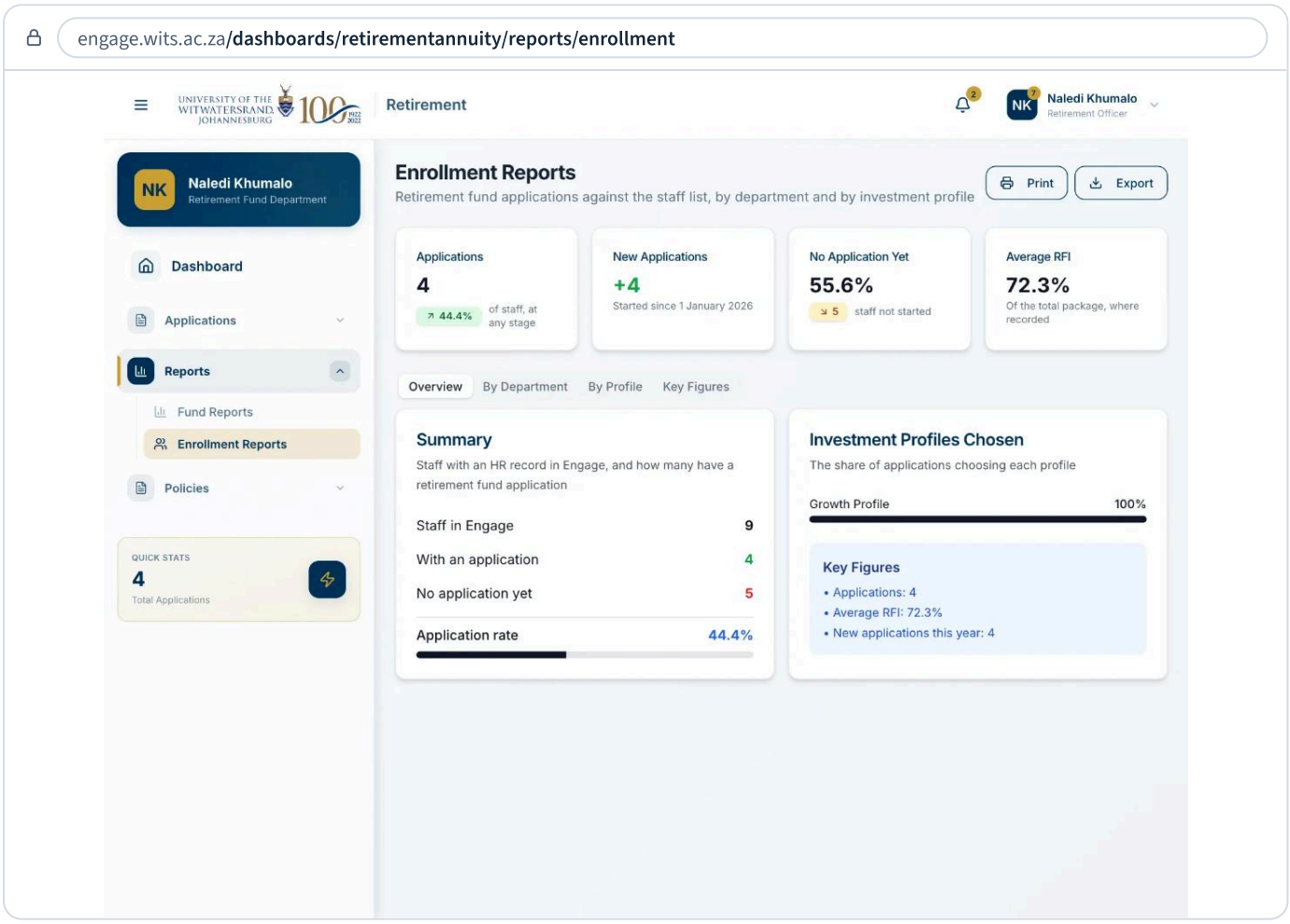
You cannot approve while the RFI percentage is outside 55–100%, or before the staff member has submitted all four steps. You cannot decide your own application: a colleague in your team must.

Once you confirm, the staff member gets one notification that their application was approved or rejected, with your note. **Quick Actions** then shows the outcome, its date and your note.

To change a decision, select **Change decision** and decide again. The staff member is told the new outcome.

Find approved applications, profile changes and enrolment figures

- **Applications** › **Approved** lists every application your team has approved, the most recent first, with the day the staff member submitted it and the day it was approved. Select **View Details** to see the member's details and beneficiaries; **Generate Report** there saves them as a PDF. **Export Report** saves the list as a spreadsheet file.
- **Applications** › **Profile Changes** shows the investment profile changes members have made, from which profile to which. A member's change is recorded as done when they make it, so most read **Completed**.
- **Reports** › **Fund Reports** and **Reports** › **Enrollment Reports** count applications against the staff list, by investment profile, RFI and department. **Applications** counts every application, submitted or not. **No Application Yet** is staff who have not reached the retirement step of their onboarding; it does not mean they declined the fund. **Export Report**, or **Export**, saves the figures as a spreadsheet file.



Enrollment Reports. **No Application Yet** counts staff who have not reached the retirement step, not people who declined.

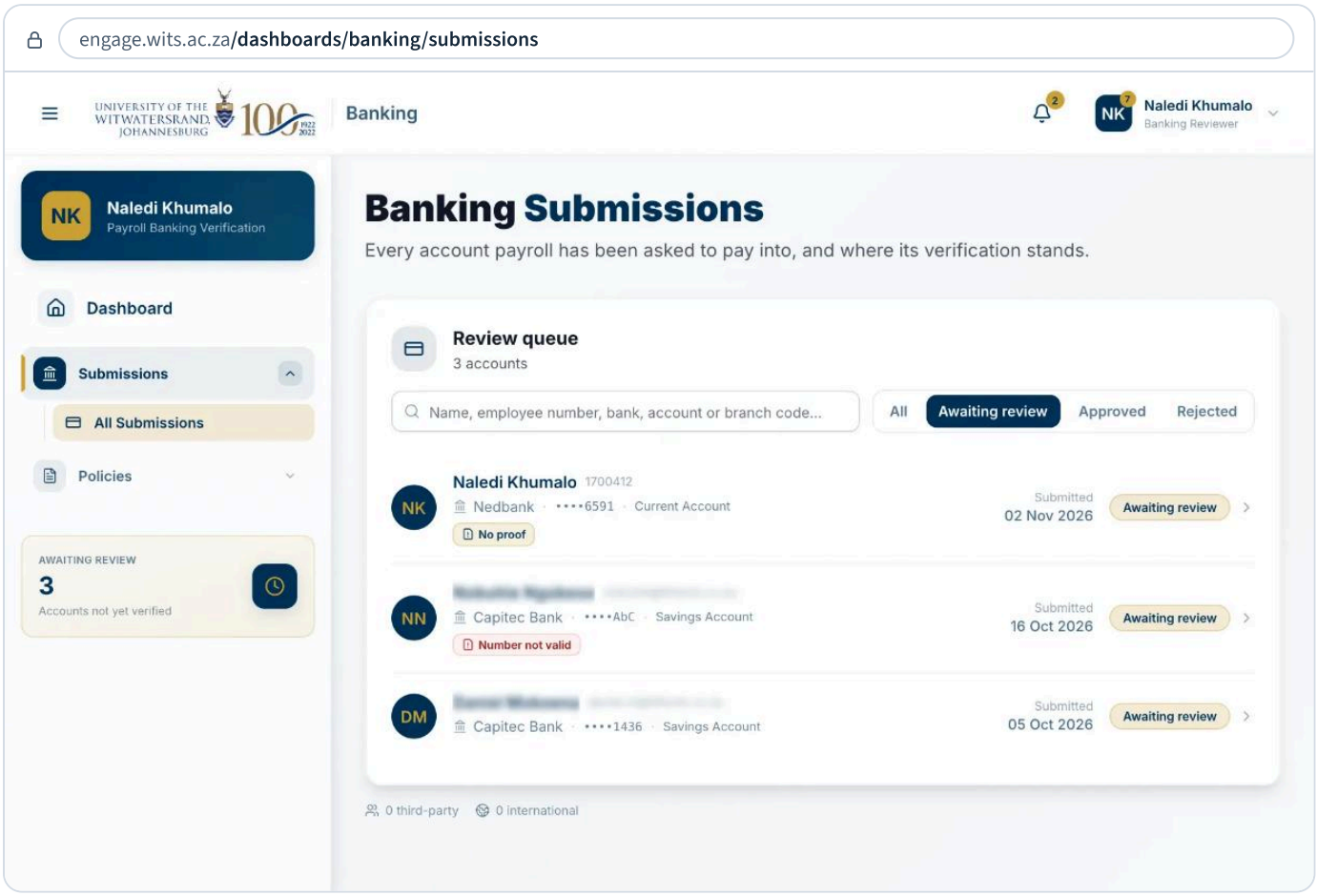
Banking

For payroll banking verification · the **Banking** dashboard

Each new staff member gives the bank account their salary is paid into. You check it against their proof of banking before payroll uses it.

See which accounts are waiting

Open **Submissions** › **All Submissions**. It opens on **Awaiting review**; select **Approved**, **Rejected** or **All** to see the others. You can search by name, employee number, bank, account number or branch code.



Only the end of each account number shows in the list. The full number is on the account's own page.

Labels warn you about an account that needs more care:

- **Changed after decision**: the staff member changed an account your team had already decided, so it is back for checking.
- **Number not valid**: the account number is not one that can be paid into. It cannot be approved.
- **Third party**: the account belongs to someone other than the staff member.
- **International**: a bank outside South Africa, checked by its SWIFT/BIC and IBAN instead of a branch code.
- **No proof**: no proof of banking has been uploaded.

Check an account

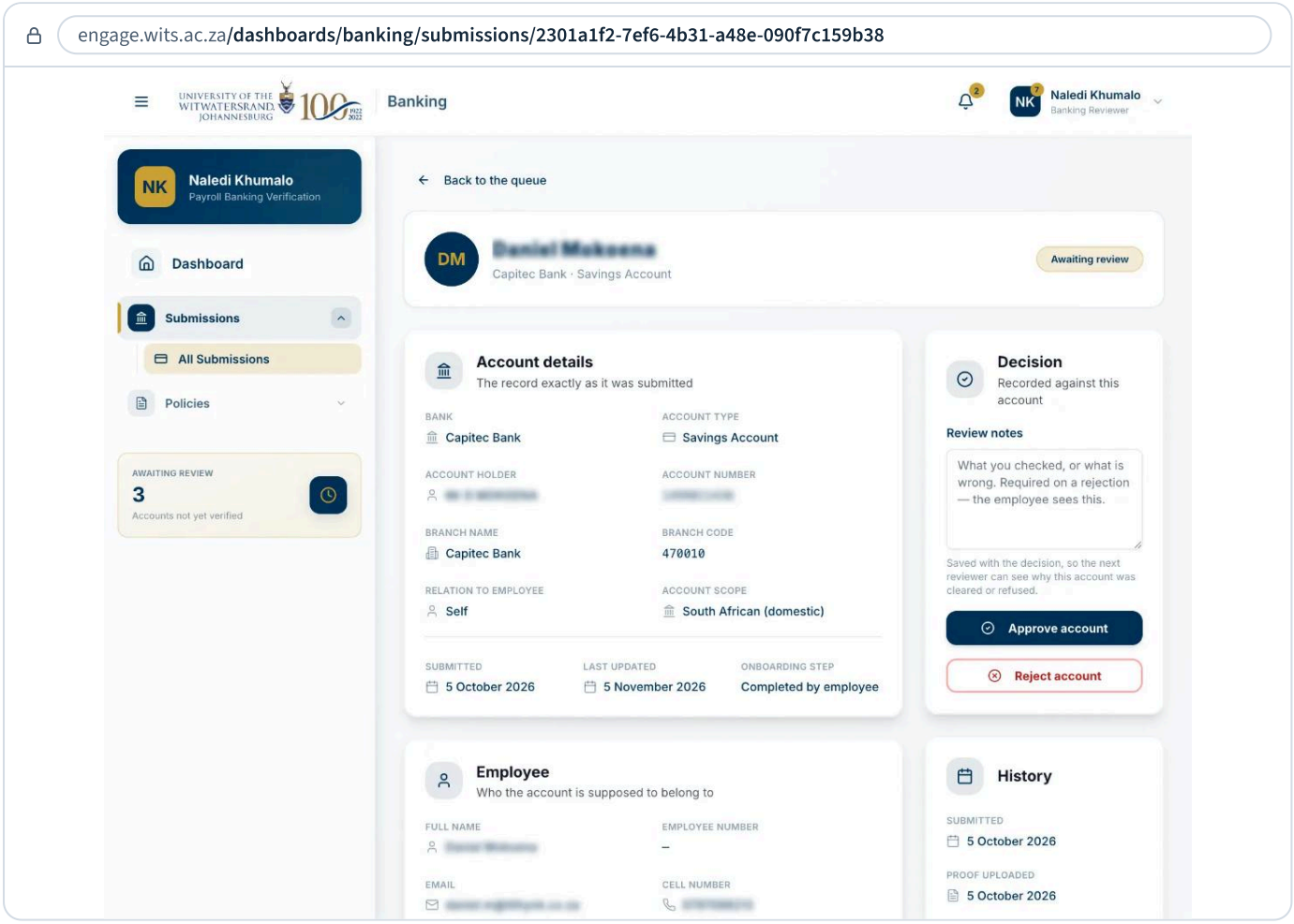
Select an account to open it. Any warning is stated first, at the top of the page. Then compare:

- **Account details**: bank, account holder, account number, branch code and the holder's relation to the staff member.
- **Employee**: who the account should belong to.

- **Proof of banking**, lower down: select **Preview** to look at the uploaded document, or **Download** to save it. Make sure it really is a bank confirmation for this account.

Approve or reject an account

1. Under **Decision**, type in **Review notes** what you checked or what is wrong. A rejection needs a note.
2. Select **Approve account** or **Reject account**.
3. Check the question that appears, then select **Yes, approve** or **Yes, reject**. **Go back** leaves the account as it was.



Your note is saved with the decision and sent to the staff member.

Once you confirm, the decision is saved. The staff member is told their banking details were approved or rejected, with your note. Their latest proof of banking on My Documents is marked approved or rejected at the same time, with the same note. You cannot decide your own account, and an account number that is not valid cannot be approved: reject it and say what to correct.

To correct a decision, open the account, write the note for the new decision in **Review notes** (the box starts empty), select **Change to rejected** or **Change to approved**, and confirm. The note already on record is under **History**.

TAKE CARE

If a staff member changes their bank details after your team has decided them, the account goes back to **Awaiting review**, and everyone in the banking team gets a notification. The staff member is told too. Payroll should not use the new details until you approve them again.

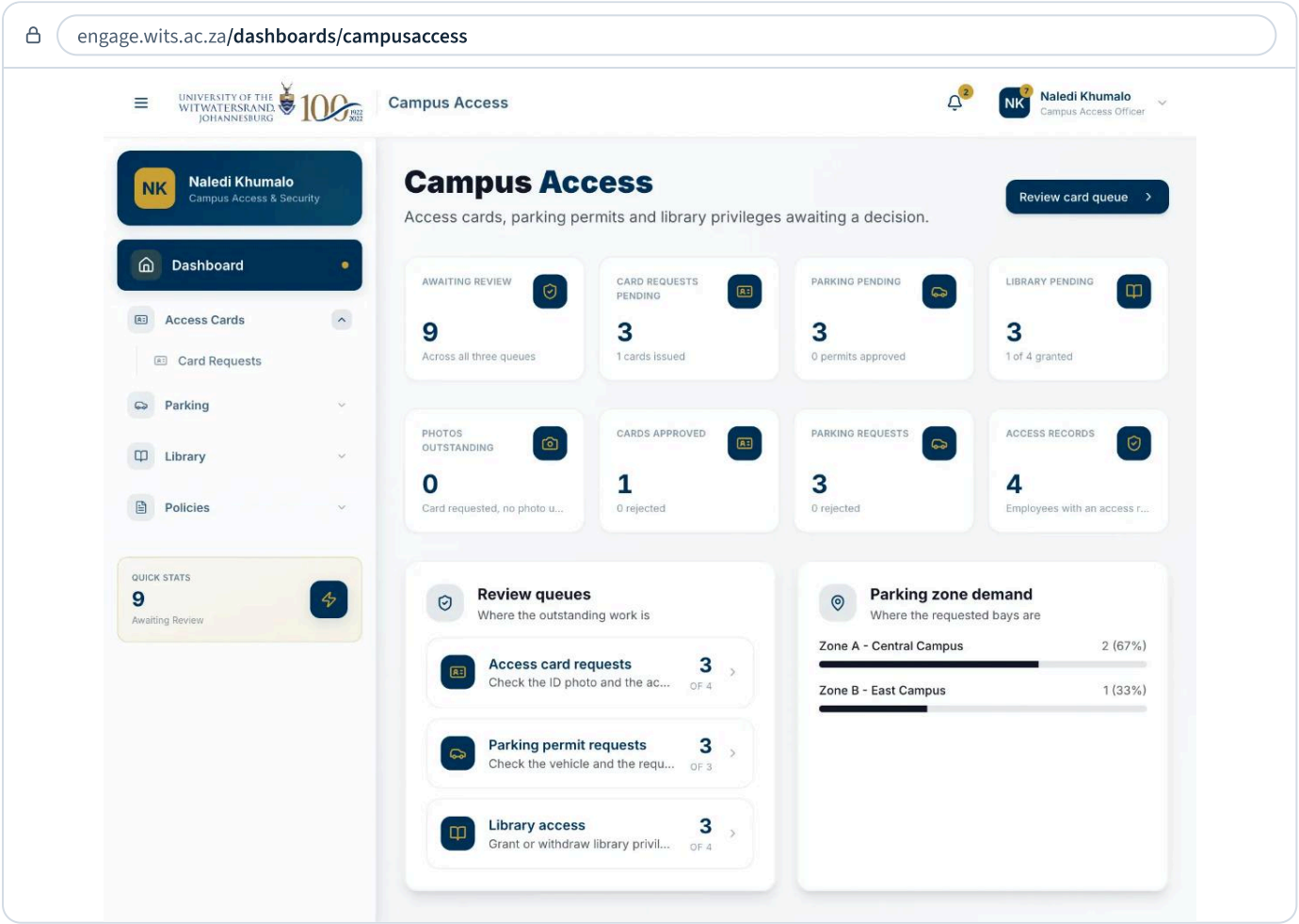
Campus access

For campus access and security · the **Campus Access** dashboard

During onboarding, staff ask for an access card, a parking permit and library access. Each has its own queue.

See what is waiting

The dashboard's **Review queues** shows how many card, parking and library requests are pending. Select one to open that queue, or use the menu: **Access Cards › Card Requests**, **Parking › Permit Requests** or **Library › Library Access**. Each queue opens on its pending tab.

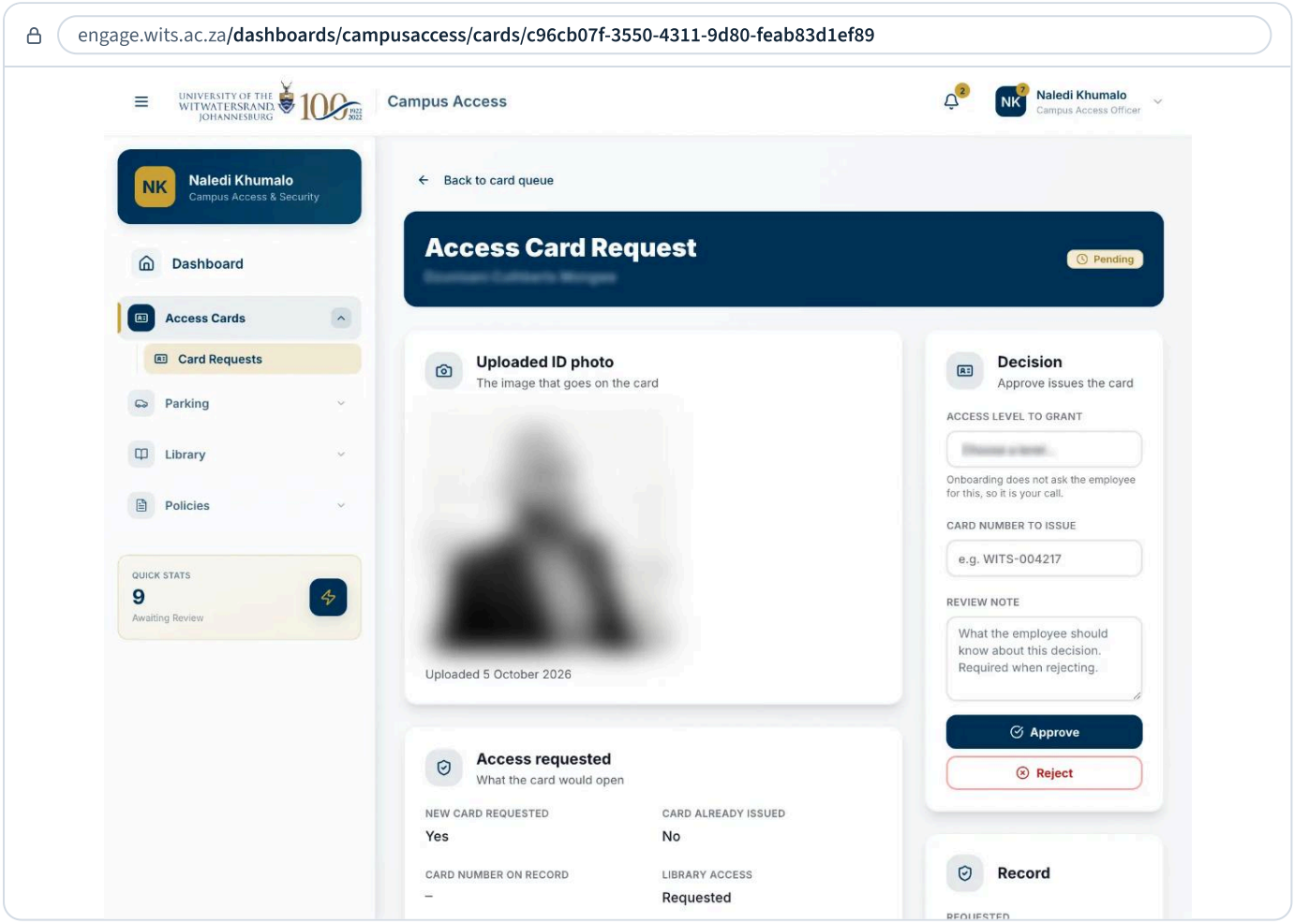


Photos outstanding counts card requests that still have no ID photo.

Approve or reject an access card

1. In **Access Cards › Card Requests**, select **Review** on a request.

2. Check the **Uploaded ID photo**: it is the picture that goes on the card.
3. Under **Decision**, choose the **Access level to grant**: Basic, Extended, Research or Administrative. Onboarding does not ask the staff member, so this is your choice.
4. Type the **Card number to issue**, and a **Review note** if you want to.
5. Select **Approve**. To turn the request down instead, write a note and select **Reject**.
6. Check the question that appears, then select **Yes, approve** or **Yes, reject**. **Go back** leaves the request as it was.



Approving needs both an access level and a card number. The photo is blurred in this manual.

If a new card was requested but no photo has been uploaded, **Approve** is unavailable and the panel says why. Approving issues the card number. The staff member is told their campus access request was approved or rejected, with your note.

Approve or reject a parking permit

In **Parking** › **Permit Requests**, select **Review**. Check the **Vehicle** and the **Zone requested**. Type the **Permit number to issue** and select **Approve**, or write a note and select **Reject**, then confirm with **Yes, approve** or **Yes, reject**. **Approve** is unavailable when no vehicle registration was given.

The staff member is told the permit was approved, with its number, or that it was rejected. If you wrote a note, they get your note instead.

Change a card or parking decision

Once a request is decided, the **Decision** panel shows the outcome, its date and the note. Select **Change decision** to decide again, or **Cancel** to keep it. The staff member is told the new outcome. Changing a parking approval to a rejection takes the permit away.

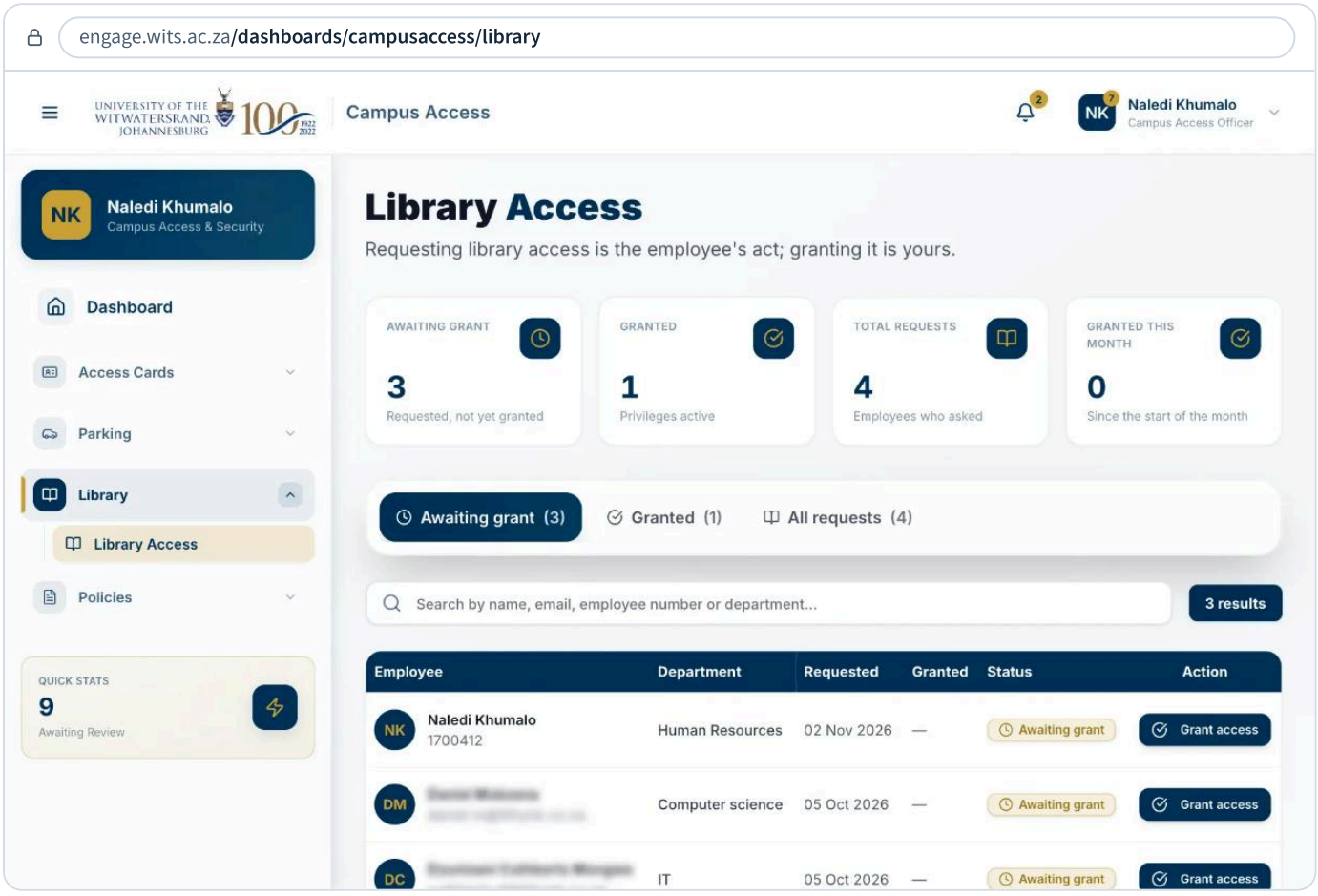
If a staff member corrects a rejected request, it comes back as pending. The panel then shows when it was last decided and the note, above the decision.

GOOD TO KNOW

You cannot decide your own request: a colleague in your team must.

Grant library access

Library › **Library Access** lists everyone who asked for library access. Select **Grant access** on a request, then **Grant access** again to confirm. To take it away later, find it under **Granted**, select **Withdraw** and confirm; it goes back to **Awaiting grant**.



Grant access and **Withdraw** each ask you to confirm first.

The staff member gets a notification when you grant or withdraw their library access, and the change is recorded with your name.

PART 9 · BACK OFFICE

Running Engage: the back office

For the staff who look after Engage day to day. It covers the morning health check, alerts and incidents, who has access to what, the outside services and scheduled jobs Engage relies on, messages to all staff, and the records the University keeps under POPIA.

The back office

For platform administrators · **Back Office** under **Switch Dashboard** in your account menu

The back office is where Engage itself is run: its health, who may use which part of it, the outside services it connects to, and the University's privacy records. It opens only for people who hold the **Platform Administrator** role.

Open the back office

1. Select your name or photo at the top right of any Engage page.
2. Under **Switch Dashboard**, select **Back Office**.

You land on **Live Operations**. The menu on the left groups everything else under **Monitor**, **People & Access**, **Platform** and **Compliance**.

The bell at the top counts the alerts nobody has picked up yet: open, and not acknowledged. Select it to see the newest, under **Not picked up**. While you have the back office open, a critical alert also pops up in the corner of the screen the moment it is raised.

GOOD TO KNOW

The Platform Administrator role on its own opens no staff record: no banking details, medical aid or HR files. To work with those you also need that team's role.

Sign in again for a sensitive action

Some actions need a recent sign-in, so that a laptop left open cannot be used to hand out access:

- changing a service key
- giving or removing a role, or appointing or removing an administrator
- signing someone out everywhere, or suspending or restoring an account
- compiling everything held about a person for a POPIA request.

If you signed in longer ago than the limit (15 minutes, unless an administrator has changed it), a message appears with **Sign in again**. Select it and sign in with your Wits Microsoft account. You come back to the same page; do the action again.

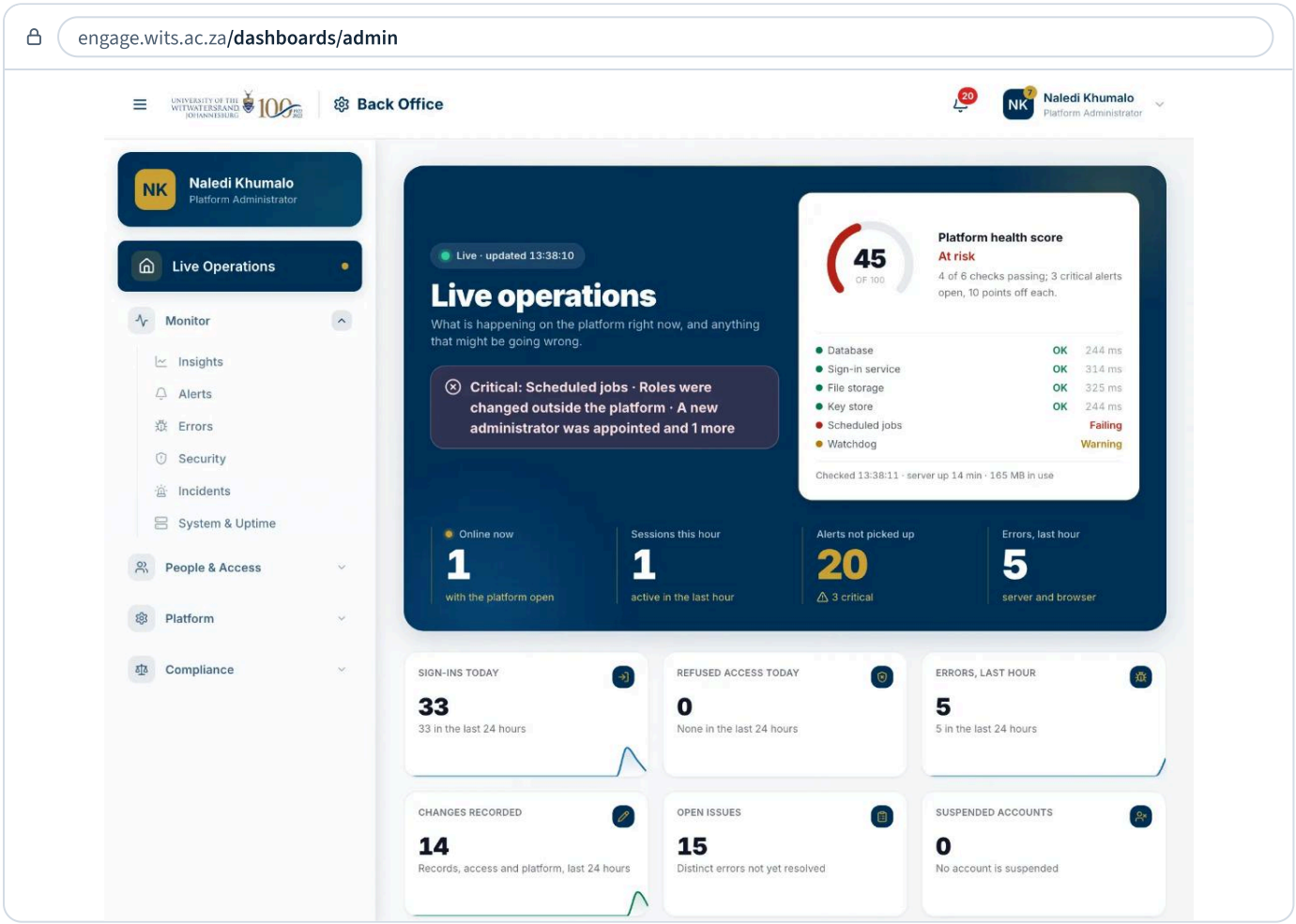
Check that Engage is healthy

For platform administrators · **Live Operations** and **Monitor** in the menu

Live Operations shows what is happening on Engage right now, and anything that might be going wrong. It updates by itself, so you can leave it open.

Do the morning check

1. Open **Live Operations**. Under the heading, read the verdict: **All systems normal**, or what needs attention. The **Platform health score** beside it lists each check, with **OK**, **Warning** or **Failing**.
2. Look at **Needs attention**. It lists every open alert, critical first. Deal with each one (see Respond to an alert).
3. Look at **Integrations**. Each outside service should be working. If one is failing, see Replace a service key.
4. Open **Platform › Scheduled Jobs**. Every job should say **Working**, or **Skipped on its last run** if it has been switched off on purpose.
5. Open **Monitor › System & Uptime** and select **Backups**. The last full backup should be less than a day old.



The verdict on the left names anything critical. Each open critical alert takes 10 points off the health score.

Further down the page are **Live activity** (changes, security events and errors as they happen), **Last 24 hours**, **Online now** (who has Engage open, by area) and **Recent errors**.

GOOD TO KNOW

Every morning at 07:00, a list of the alerts nobody has picked up is emailed to the alert recipients (see Choose who is told about alerts). Nothing is sent on a day when every alert has been picked up.

TAKE CARE

If the **Watchdog** check beside the health score is not **OK**, Engage's regular background check has stopped. Nothing is then checked or emailed: problems show only when someone opens the back office.

See how Engage is used over time

Monitor › **Insights** draws the same figures over a longer period: sign-ins, people active each day, errors, refused access, staff learning activity, alerts, scheduled jobs and who holds which role. Its **Readiness** panel shows what is still to be set up, such as links without an address.

Check backups, key expiry and email delivery

Monitor › **System & Uptime** has a section for each, chosen along the top:

- **Availability**: each day, for each part of Engage, the share of its regular checks that passed.
- **Backups**: each night's backup is recorded here when it finishes. If no full backup succeeds for 26 hours, a critical alert is raised.
- **Release**: the **Version** of Engage that is running, when it was **Released**, and whether everything that version needs is in place, shown as **Up to date**.
- **Key expiry**: the date each service key runs out. Enter it under **Expires on**, with a **Note** on who renews it, and select **Save**. A warning is raised 30 days ahead, and a critical alert in the last week.
- **Integrity**: whether the audit trail and security log are **Intact**. **Broken** means an earlier entry was altered or removed.
- **Email delivery**: how many of Engage's emails were delivered, bounced or marked as spam in the last 30 days. A bounce usually means a mistyped or closed address.

Some sections end with **Technical detail**. It opens the finer detail that the ICT staff who look after Engage may ask for. You do not need it for the daily check.

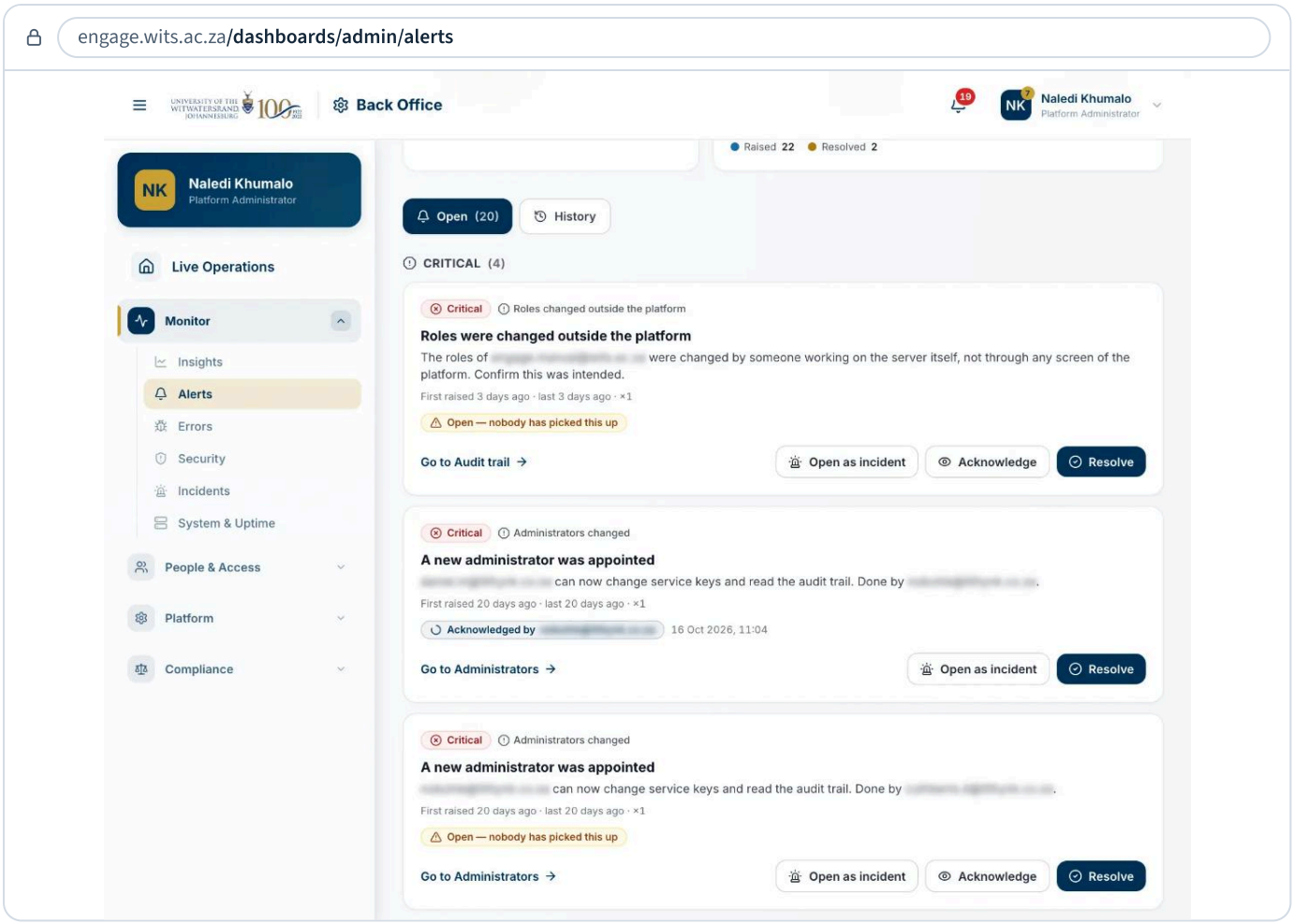
Alerts, errors and incidents

For platform administrators · **Monitor** in the menu

An alert is Engage telling you something has gone wrong. Engage raises it by itself and closes it by itself when the problem clears. Nobody has to file one.

Respond to an alert

1. Open **Monitor** › **Alerts**. The **Open** tab lists everything not yet resolved, critical first.
2. Select **Acknowledge**, so the other administrators can see someone is looking at it.
3. Follow the link on the alert (**Go to …**) to the page where the problem is, and deal with it there.
4. Select **Resolve**. If it needs an owner and a written record, select **Open as incident** instead.



Each alert says when it was first raised, when it last happened and how many times.

Many alerts close themselves: a failed job's alert clears when the job next succeeds, and shows **Cleared automatically**. Resolved alerts move to **History**, where **Reopen** brings one back. If the same problem happens again while its alert is open, the alert counts it rather than raising a new one.

An acknowledged alert stays acknowledged for as long as the problem goes on. It goes back to open only if the problem gets more serious, for example a warning that becomes critical. Once the problem clears, the alert closes; if it comes back later, a new alert is raised.

Critical alerts are emailed to the alert recipients at once, and posted to a Microsoft Teams channel if one is set up. A warning nobody acknowledges is emailed after 30 minutes, unless that has been changed in Settings.

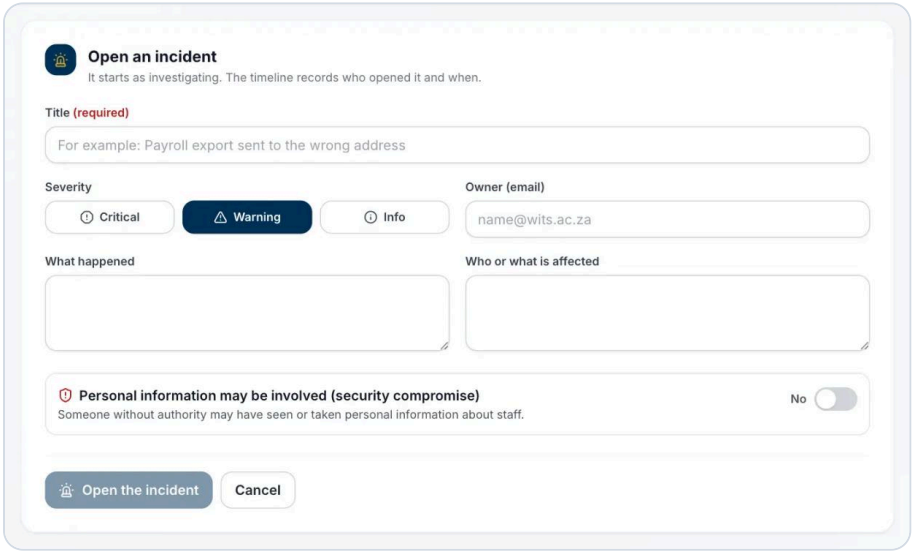
What happened	How serious	Closes itself when
A scheduled job failed	Critical	the job next succeeds
A scheduled job has not run on time	Warning	the job next succeeds
A service key stopped working (checked every hour)	Critical	the next check passes
The course catalogue or learning activity is more than 3 days old	Warning	fresh data arrives
A new error, or an error marked resolved came back	Warning	the error is resolved or ignored
25 or more errors in 10 minutes	Critical	never

What happened	How serious	Closes itself when
Someone was refused access 5 or more times in 10 minutes	Warning	never
An administrator signed in from a new address	Warning	never
An administrator was appointed or removed	Critical	never
Someone's roles were changed outside Engage's own screens	Critical	never
A service key was changed	Info	never
An account was suspended or restored	Warning or info	never

Record an incident

Open an incident when something has gone wrong badly enough to need an owner and a written record, for example a payroll export sent to the wrong address.

1. On the alert, select **Open as incident**. Or open **Monitor** › **Incidents** and select **Open an incident**.
2. Fill in **Title**, **Severity**, **Owner (email)**, **What happened** and **Who or what is affected**. From an alert, the title is already filled in.
3. If someone without authority may have seen or taken personal information about staff, turn on **Personal information may be involved (security compromise)**.
4. Select **Open the incident**.



Turn on the switch at the bottom only when staff's personal information may be involved. It starts the POPIA clocks.

The incident starts at **Investigating**. Select it in the list to open its details. As work goes on, select the next stage: **Identified**, **Monitoring**, then **Resolved**. Under the timeline, choose **Note** or **Action taken**, write what happened, and select **Add note** or **Add action**. Every stage change and entry goes on the timeline with the name and time.

Report a security compromise

POPIA section 22 says that when personal information is compromised, the University must tell two parties, as soon as reasonably possible: the Information Regulator, on form SCN1 through the Regulator's eServices portal, and the people whose information was affected, in writing.

An incident marked as a compromise shows two clocks, **Information Regulator** and **People affected**, counting from when it was detected. When each notice has gone:

1. Select **Record notification** on that clock.
2. Enter **When**, and the **SCN1 reference or method** or **How they were told**.
3. Select **Record it**.

Fill in the form's other details as they become known: **Information involved**, **People affected**, **Containment: what was done to stop it** and **Root cause**. A compromise not reported to the Regulator within 72 hours raises a critical alert.

Deal with an error

Monitor › **Errors** lists every failure, grouped by cause: one entry, however many times it happened, with how often, how many people it affected and when it last happened. Email addresses and long numbers are removed from the messages. Use **Source** to choose **Server** (inside Engage) or **Browser** (on a staff member's own device).

- **Mark resolved** means it has been fixed. If it happens again it reopens as **Came back** and raises an alert.
- **Ignore** means it is known and accepted. It moves to the **Ignored** list and raises no more alerts.
- **Reopen** puts a resolved or ignored error back on the open list.

Check sign-ins and refused access

Monitor › **Security** starts with **Security checks**: standing checks on how Engage is set up, each **Passing**, **Attention** or **Failing**. **Fix** beside a check opens the place to put it right.

Below is **Security events**: every sign-in, sign-in from a new address, refused page, signing out everywhere and suspension, newest first. Filter it by **Kind**, **Severity** or **Person**. **Hide routine sign-ins** leaves out ordinary sign-ins and sign-outs. Nobody can change or delete this log.

People and access

For platform administrators · **People & Access** in the menu

A role decides which dashboards a person can open. Everyone has **Employee**, and roles add up: someone with HR and Banking reaches everything either role opens. Every role change is recorded in the audit trail with the name of the person who made it.

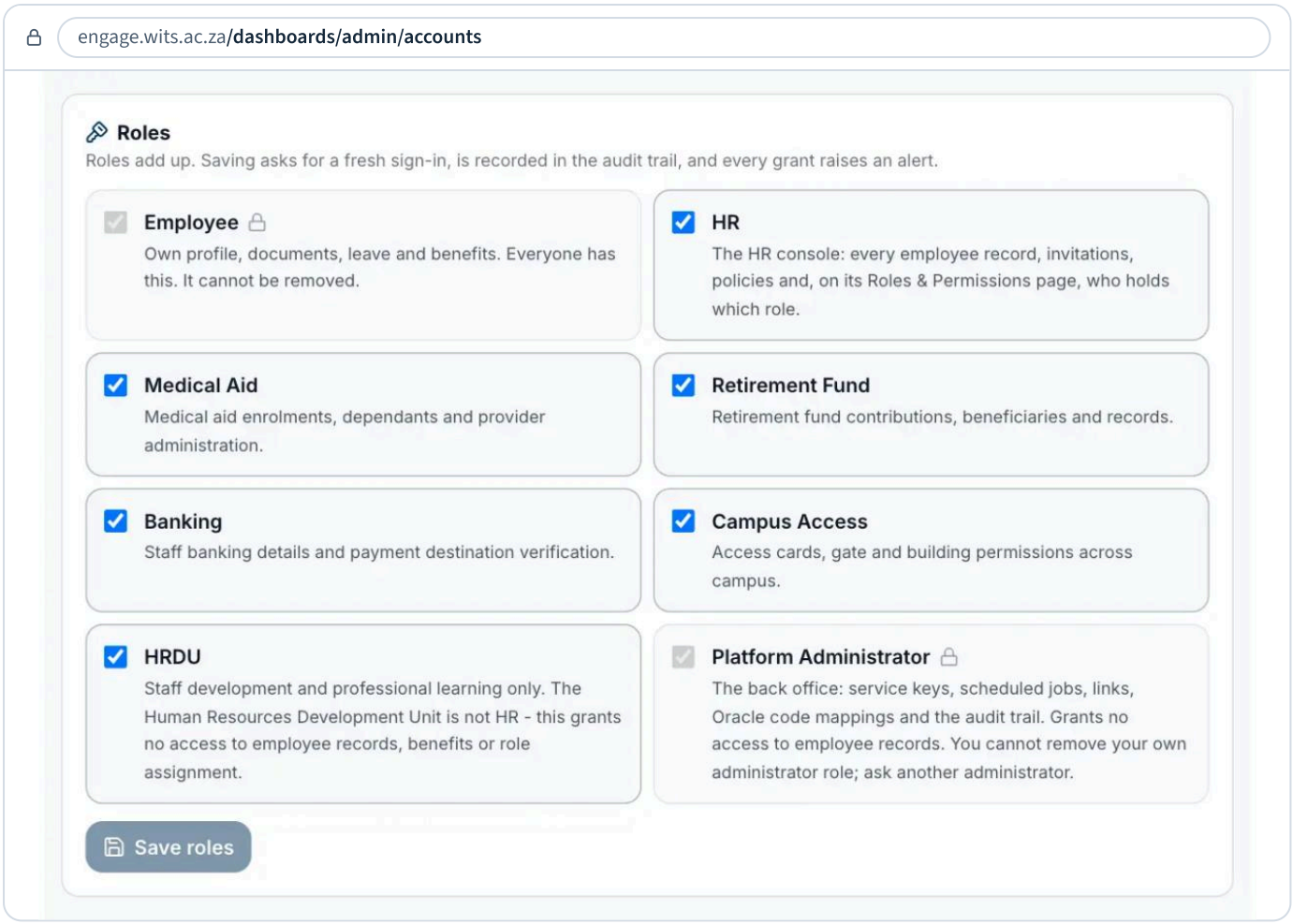
See what each role opens

Role	What it opens	Needs a second administrator to approve
Employee	Their own profile, documents, leave and benefits. Everyone has it, and it cannot be taken away.	No
HR	The HR dashboard: every employee record, invitations, policies, and, on its Roles & Permissions page, who holds which role.	Yes
Medical Aid	Medical aid enrolments, dependants and provider administration.	Yes
Retirement Fund	Retirement fund contributions, beneficiaries and records.	Yes
Banking	Staff banking details and checking where payments go.	Yes
Campus Access	Access cards, and gate and building permissions across campus.	Yes
HRDU	Staff development and professional learning only. It opens no employee records, benefits or roles.	No
Platform Administrator	The back office. It opens no employee records.	Yes

People & Access › Permissions shows the same, with how many people hold each role and a grid, **Who reaches what**, that ticks each area of Engage a role opens.

Give someone a role

1. Open **People & Access › Accounts & Roles**.
2. Type part of their name or email address in **Search**, then select **Manage** beside their name.
3. Under **Roles**, tick the role. It is marked **Will add**.
4. Select **Save roles**. For HR, Medical Aid, Retirement Fund, Banking, Campus Access or Platform Administrator the button reads **Ask for approval**: first write why the access is needed, for the approving administrator to read.



Each role says what it opens. A padlock means it cannot be changed here: Employee, and your own Platform Administrator role.

A grant needing approval waits under **Waiting for a second administrator** until a different administrator, not you and not the person receiving it, approves it. Nothing changes until then, and the request lapses after 7 days. If there is no other administrator, the grant applies at once and raises a critical alert. Every grant raises an alert.

HR can give every role except Platform Administrator from its own **Roles & Permissions** page. When HR gives HR, Banking, Medical Aid, Retirement Fund or Campus Access, the grant waits here for an administrator's approval.

Approve or reject a role request

1. On **People & Access** › **Accounts & Roles**, find the request under **Waiting for a second administrator** and read the reason given.
2. Select **Approve** or **Reject**, and add a **Note (optional)**.
3. Select **Approve and apply** or **Reject request**.

You cannot decide a request you made, or one for your own account. To take back your own request, select **Withdraw**.

Take a role away

1. On **People & Access** › **Accounts & Roles**, select **Manage** beside the person's name.
2. Untick the role. It is marked **Will remove**.

3. Select **Save roles**.

Removing a role applies at once; it never waits for approval. If the same change also adds a role that needs approval, the removal waits with it, so save a removal on its own. You cannot remove your own Platform Administrator role.

Sign someone out or suspend an account

Select **Manage** beside the person's name, then:

- **Sign out everywhere** ends every session they have. Pages they already have open keep working for up to an hour, then they must sign in again.
- **Suspend** does the same and blocks them from signing in until the account is restored. You must give a reason.
- **Restore** lets a suspended person sign in again with their usual roles.

Each asks you to confirm, with **Sign out everywhere**, **Suspend account** or **Restore account**, and records the reason in the audit trail. You cannot do these to your own account. Engage also suspends, each night, any account Wits has disabled in its Microsoft directory.

Review who has access

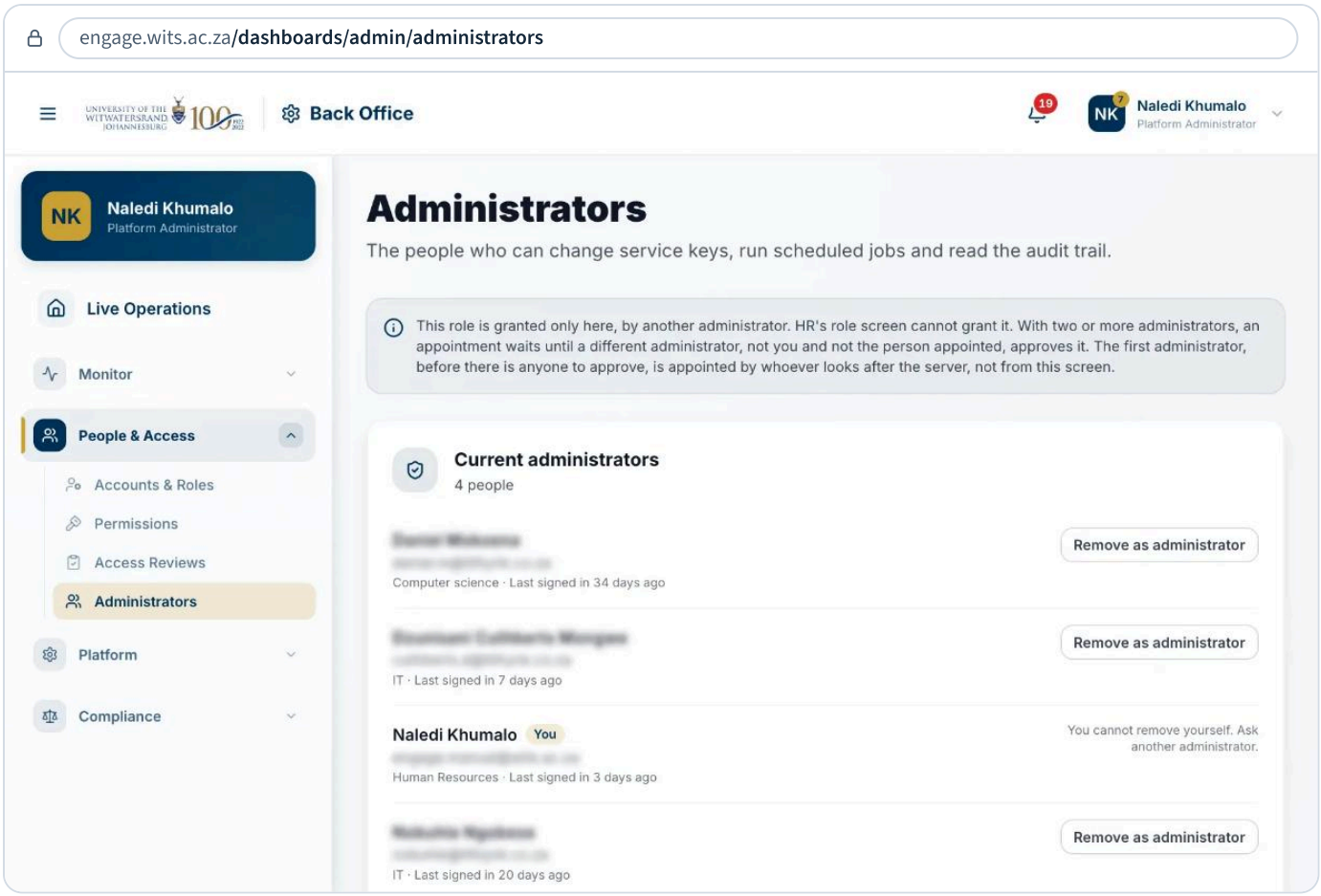
An access review confirms that everyone with more than everyday access still needs it. Engage starts one each quarter by itself: a snapshot of everyone holding a role beyond Employee. To start one now, select **Start a review**, give it a **Name** and **Days to complete**, and select **Start the review**.

1. Open **People & Access** › **Access Reviews** and select the review.
2. For each account, choose **Keep**, **Reduce** or **Remove**. Reduce and Remove ask what should change and why; write it, then select **Record “reduce”** or **Record “remove”**.
3. Use **Undecided only** and **Idle accounts** (not signed in for 60 days or more) to see what is left.
4. Make the changes on **Accounts & Roles**. A decision records what should change; it does not change anyone's roles.

The review closes itself when the last account is decided. Its decisions are then final.

Add or remove an administrator

Administrators can change service keys, run scheduled jobs and read the audit trail. Keep at least two, so that one can approve the other's changes and nobody is locked out.



Each administrator shows their department and when they last signed in. Your own line says you cannot remove yourself.

1. Open **People & Access › Administrators**.
2. Under **Appoint an administrator**, search for the person by name or email. They must have signed in to Engage at least once.
3. Select **Appoint**, write why they need to be an administrator, and select **Appoint … as administrator** (it carries their first name).

With two or more administrators, the appointment waits under **Appointments waiting for approval** until a different administrator approves it on the Accounts & Roles page. It lapses after 7 days.

To remove one, select **Remove as administrator** beside their name under **Current administrators**, then the **Remove** button with their first name. Their other roles stay. You cannot remove yourself, and the last administrator cannot be removed. Every appointment and removal raises a critical alert.

The services and jobs Engage relies on

For platform administrators · **Platform** in the menu

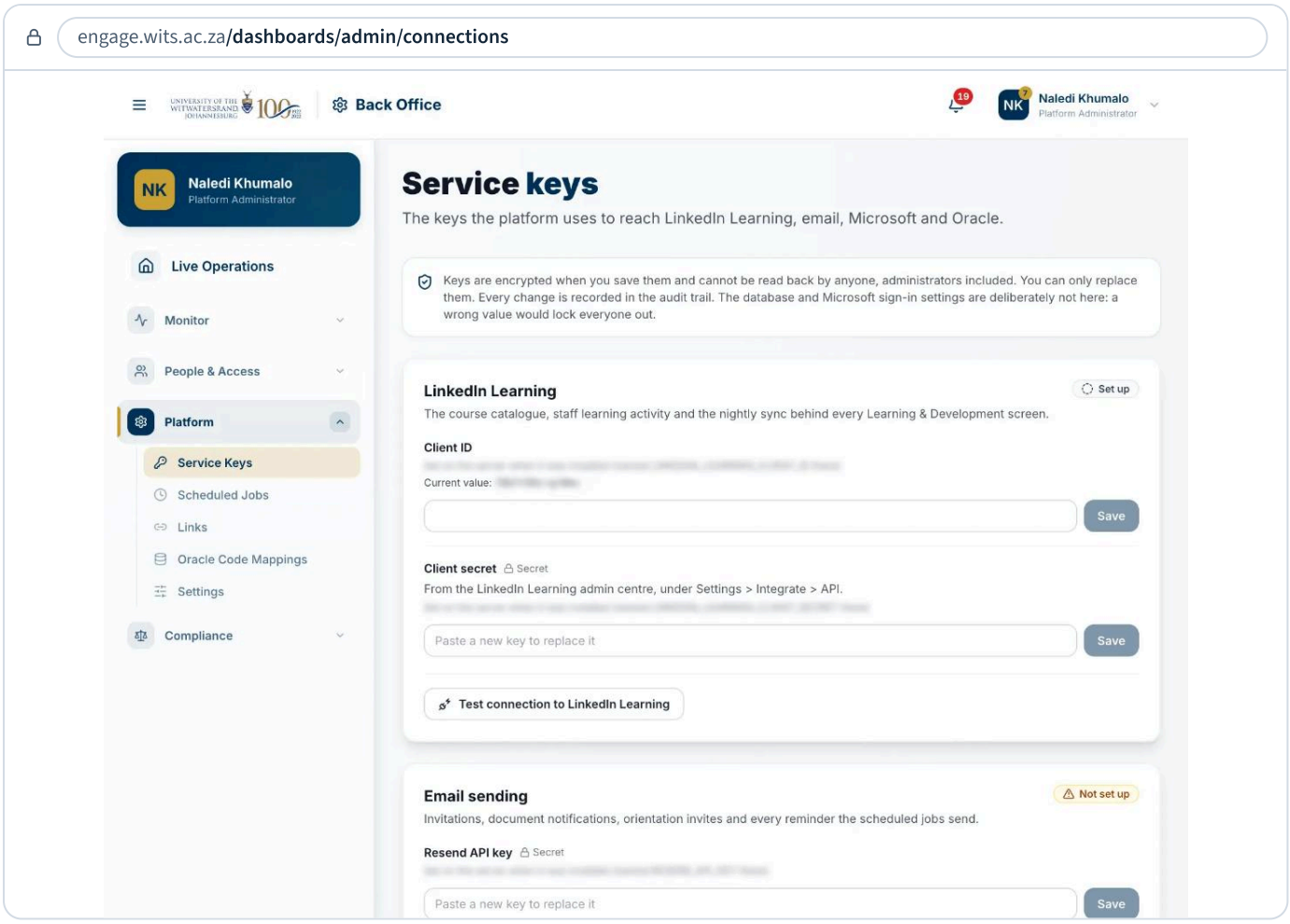
Engage connects to outside services, such as LinkedIn Learning and email, and does some work by itself on a timetable. This is where you keep both running.

Replace a service key

A service key is the password Engage uses to reach an outside service on the University's behalf. Suppliers issue new ones from time to time, or when one runs out.

Service	What it is for
LinkedIn Learning	The course catalogue, staff learning activity and the nightly update behind every Learning & Development screen.
Email sending	Invitations, document notifications, orientation invites and every reminder Engage sends. **Send as** is the address emails come from.
Microsoft staff directory	Looking staff up by name when HR sends an invitation. Signing in to Engage does not use it.
Microsoft Teams alerts	Posting critical alerts, and warnings nobody has picked up, into a Teams channel as well as by email.
Oracle integration (ICT middleware)	Handing HR-approved onboarding records to Wits ICT for Oracle. Nothing is sent until Wits ICT defines how, whatever is entered here.

1. Open **Platform** › **Service Keys** and find the service.
2. Paste the new key into its box and select **Save**.
3. Select **Test connection to …**. It should say **Working**.
4. Record the new key's end date on **Monitor** › **System & Uptime**, under **Key expiry**.



A saved key never shows again. To change it, paste the new one into the empty box and save.

The new key is in use within a minute and the old one is gone. Nobody can read a saved key back, administrators included: you can only replace it. Every change is recorded in the audit trail and raises an info alert.

Go back to the value set on the server removes the key saved here, so Engage goes back to the one it was installed with. If it was installed without one, that service stops until a key is saved.

TAKE CARE

Paste a key only into its box on this page. Never put one in an email, a Teams message or an incident note.

GOOD TO KNOW

Signing in with Microsoft is deliberately not managed here: a wrong value would lock everyone out, including the people who could correct it.

Run a scheduled job now

A scheduled job is a task Engage does by itself on a timetable, such as sending reminders. Each runs at the time shown. You can also run one at once, for example to catch up after a failed run.

Job	What it does for staff	When
Leaver check (Microsoft directory)	Suspends the Engage accounts of people Wits has disabled in its Microsoft directory, and alerts when a leaver held more than everyday access.	Daily at 01:00
Back office watchdog	Engage's own regular check of its health, keys, jobs, backups and POPIA deadlines. It raises and emails alerts, and once a day checks the audit trail and applies the retention rules.	Every 5 minutes
LinkedIn catalogue sync	Refreshes the course catalogue every Learning & Development screen searches.	Daily at 02:00
LinkedIn learning activity sync	Captures what staff started, finished and watched on LinkedIn Learning.	Daily at 03:00
Knowledge gain prompts	Reminds staff who finished a course to sit its short after-course test.	Daily at 06:00
Milestone reminders	Sends the reminders staff set for a colleague's birthday or work anniversary.	Daily at 07:00
Compliance training reminders	Reminds staff of compliance training that is due or overdue.	Daily at 08:00
Buddy check-in reminders	Reminds buddies and new staff of tomorrow's check-ins.	Daily at 09:00
Survey reminders	Sends onboarding surveys as they fall due.	Daily at 10:00

1. Open **Platform › Scheduled Jobs**. Each job shows what it does, when it runs, its **Last run** and its runs in the **Last 30 days**.
2. On the job, select **Run now**.
3. Read what the job will do, then select **Yes, run … now**, or **Do not run it**.

A reminder job run by hand sends real reminders to staff. A message says how the run went, or that the job did nothing because it is switched off. If any part of a run fails, the whole run counts as failed and raises an alert, even when the rest of it worked. **Show recent runs** lists each run, marked **On schedule** or **Run by** with the administrator's address.

Status	Meaning
Working	The last run succeeded, on time.
Last run failed	The most recent run went wrong. An alert is open.
Late — last success …	The job has not succeeded for longer than it should.
Running	A run is under way now.

Status	Meaning
Skipped on its last run	The job started on time but did nothing, because it is switched off or the service it uses is not set up yet. The reason shows under the job. It raises no alert.
No run recorded	The job has never run since the back office began recording.

Pause a scheduled job

Scheduled Jobs has no pause button. Instead, turn off the matching switch under **Feature switches** in **Platform** › **Settings**:

- **LinkedIn Learning sync** stops both LinkedIn jobs. What is already captured stays.
- **Reminder emails** stops the five reminder and prompt jobs.
- **Email sending** stops every email Engage sends, not only reminders.
- **Browser error reporting** stops collecting errors from staff's browsers.

1. Turn off the switch.
2. Read what it stops, then select **Switch it off**, or **Keep it on**.

While a switch is off, its jobs still start on time but do nothing. Each run is recorded as **Skipped**, with the reason, and the job is not counted as late. Switching one off raises an alert, so it is not forgotten. To start again, turn the switch back on. The watchdog and the leaver check have no switch.

Change a link staff see

Platform › **Links** holds the addresses staff open from cards in Engage: the eight HR units, the staff development portal, and the HR, Wits 2033 and strategic framework pages on wits.ac.za. Under each, **Appears in** says where staff meet it, mostly in induction. A link marked **No address yet** shows on its card without a link.

1. Select **Edit link** on the link.
2. Change the **Address** (it starts with https://), and the **Name** or **Description** if needed.
3. Select **Save**.

Every card that uses the link follows. **Remove address** leaves the card showing without a link.

Record Oracle codes

Oracle is the University's HR system. Each choice Engage records, such as a title, marital status or race for employment equity, needs the matching Oracle code: the short value Oracle uses for that choice, which Wits ICT supplies. On **Platform** › **Oracle Code Mappings**, type the **Oracle code** and **Oracle meaning** beside each **Platform value**, then select **Save** on that line. Nothing is sent to Oracle from this page.

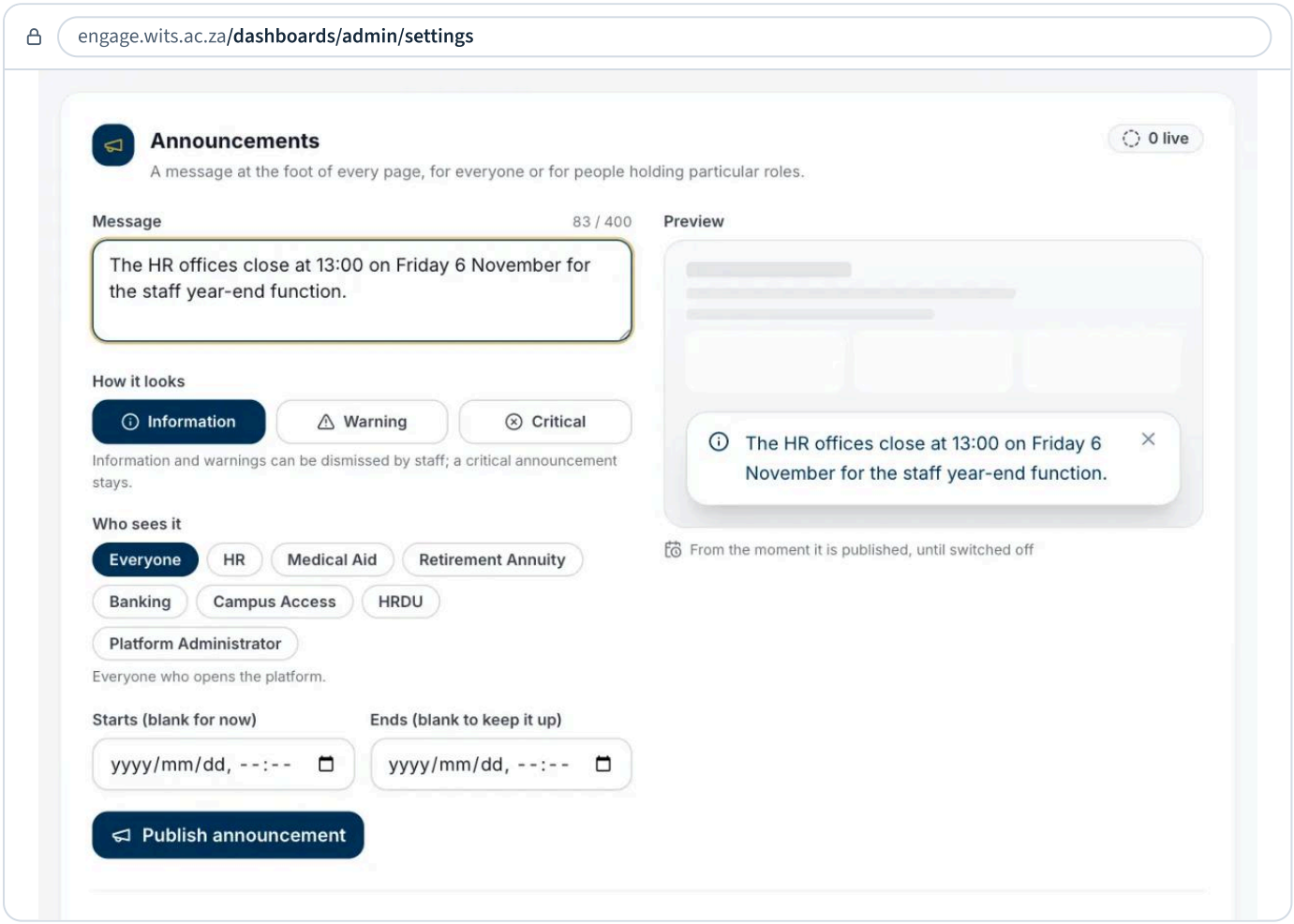
Announcements, maintenance and settings

For platform administrators · **Platform** › **Settings** in the menu

Settings changes how Engage behaves for everyone. Every change is recorded with the value it replaced, so it can be put back.

Put up an announcement

1. Open **Platform** › **Settings** and go to **Announcements**.
2. Write the **Message**, up to 400 characters.
3. Under **How it looks**, choose **Information**, **Warning** or **Critical**.
4. Under **Who sees it**, leave **Everyone**, or choose one or more roles.
5. If it should start later or end by itself, fill in **Starts (blank for now)** and **Ends (blank to keep it up)**.
6. Check the **Preview**, then select **Publish announcement** (or **Schedule announcement** for a later start).



The preview on the right shows the message as staff will see it.

Staff see the message at the foot of every Engage page. They can close an information or warning message; a critical one stays. Your announcement is listed under **Published** as **Live**, **Scheduled** or **Ended**. Use its switch to take it down at any time.

Close Engage for maintenance

1. On **Platform** › **Settings**, go to **Maintenance mode** and turn on the switch.

2. Check the **Message staff see**, and add **Expected back (optional)**.
3. Select **Turn maintenance on**.

Staff then see a page headed **Back shortly** with your message and, if you set one, the time Engage is expected back. Administrators keep access throughout, so you can check Engage before it reopens. To reopen, turn the switch off and select **Turn maintenance off**. Staff on the maintenance page are returned to Engage by themselves within 30 seconds.

TAKE CARE

Maintenance mode closes Engage to every member of staff at once, HR and the benefits teams included. Tell them before you turn it on.

Choose who is told about alerts

Under **Alert notifications**:

- **Email these people**: type an address and press Enter, or select **Add**, for each one. With nobody listed, every administrator is emailed.
- **Chase an untouched warning after**: how many minutes before an unacknowledged warning is emailed (5 to 1440).
- **Email warnings nobody picked up** and **Daily digest at 07:00** turn those emails on or off. Critical alerts are always emailed at once.
- **Send a test alert** proves the emails, and the Teams channel if one is set up, arrive. Save your changes first.

Select **Save** when you are done. **Recently sent** lists every alert email and Teams post, with whether it was delivered.

Set how recent a sign-in must be

Under **Security**, choose how many minutes (5 to 120) can pass after an administrator signs in before a sensitive action asks them to sign in again. Shorter is safer. The list of what counts as sensitive is on the card.

Put a setting back

Change history shows the last 30 changes to these settings, each with what it replaced. Select **Restore this** on a change, then **Restore**, to put the setting back as it was before it. Anything changed since is replaced too. The restore is itself recorded.

GOOD TO KNOW

The **Environment** card says which copy of Engage this is. On the University's Engage it is set to **Production**, and staff see no label. Leave it as it is.

Privacy and the record of who did what

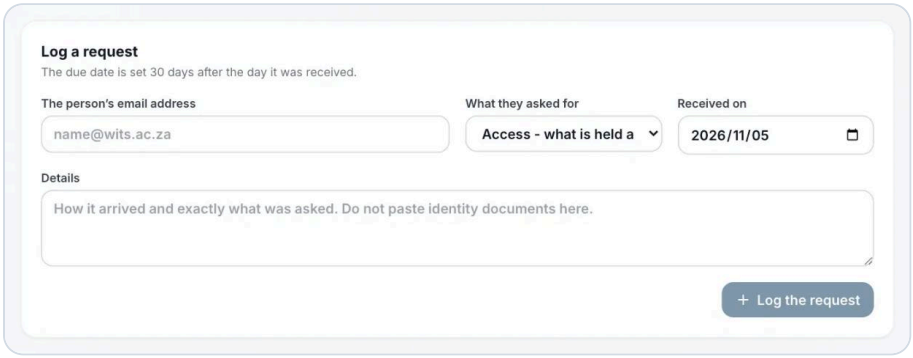
For platform administrators · **Compliance** in the menu

POPIA, the Protection of Personal Information Act, sets how the University may hold information about people. These pages hold what the Act asks the University to be able to show.

Answer a POPIA request

Anyone Engage holds information about may ask what is held, have it corrected or deleted, or object to its use. Each request must be answered within 30 days of being received.

1. Open **Compliance › Privacy (POPIA)**. On **Requests**, select **Log a request**.
2. Fill in **The person's email address**, **What they asked for**, **Received on** and **Details**. Do not paste identity documents.
3. Select **Log the request**. Its due date is set 30 days after the day it was received.



The 30-day clock starts from the date in Received on, not the day you log it.

Then work through the request:

1. Open the request in the list. Confirm who is asking, then tick **Identity verified**. Who ticked it, and when, is recorded.
2. For a request to see what is held, select **Compile records**. This downloads everything Engage holds about the person as one file, including who has opened their records. It needs the HR role as well as Platform Administrator, and a fresh sign-in.
3. Move the **Status** along as you go: **Received**, **Verifying identity**, **In progress**, **Completed**, or **Refused**.
4. Write the **Outcome**: what was done and what the person was told, or why it was refused and the section relied on. Select **Save**.

This page keeps the request and its clock. It does not change the person's record: make any correction where the record is kept, then note it under Outcome. The tiles at the top count requests **Due within 5 days** and **Overdue**.

The other tabs hold the University's registers, for the Information Officer to confirm:

- **Record of processing**: what personal information Engage processes, why, and on what legal basis.
- **Operators**: outside organisations that process personal information for the University, and whether an agreement is in place.
- **Retention**: how long each kind of record is kept. Only an **Active** rule deletes anything. Periods for personal information stay **Proposed** until HR and Legal agree them.

TAKE CARE

Once a retention rule is made Active, Engage deletes records older than its period every night. Deleted records cannot be brought back.

See who opened a staff record

Compliance › **Record Access** lists every time someone opened another person's banking details, medical aid or retirement application, access card or parking request, documents or HR file, and the lists of staff they browsed. Access card and parking requests are counted with documents, under **Documents and campus**.

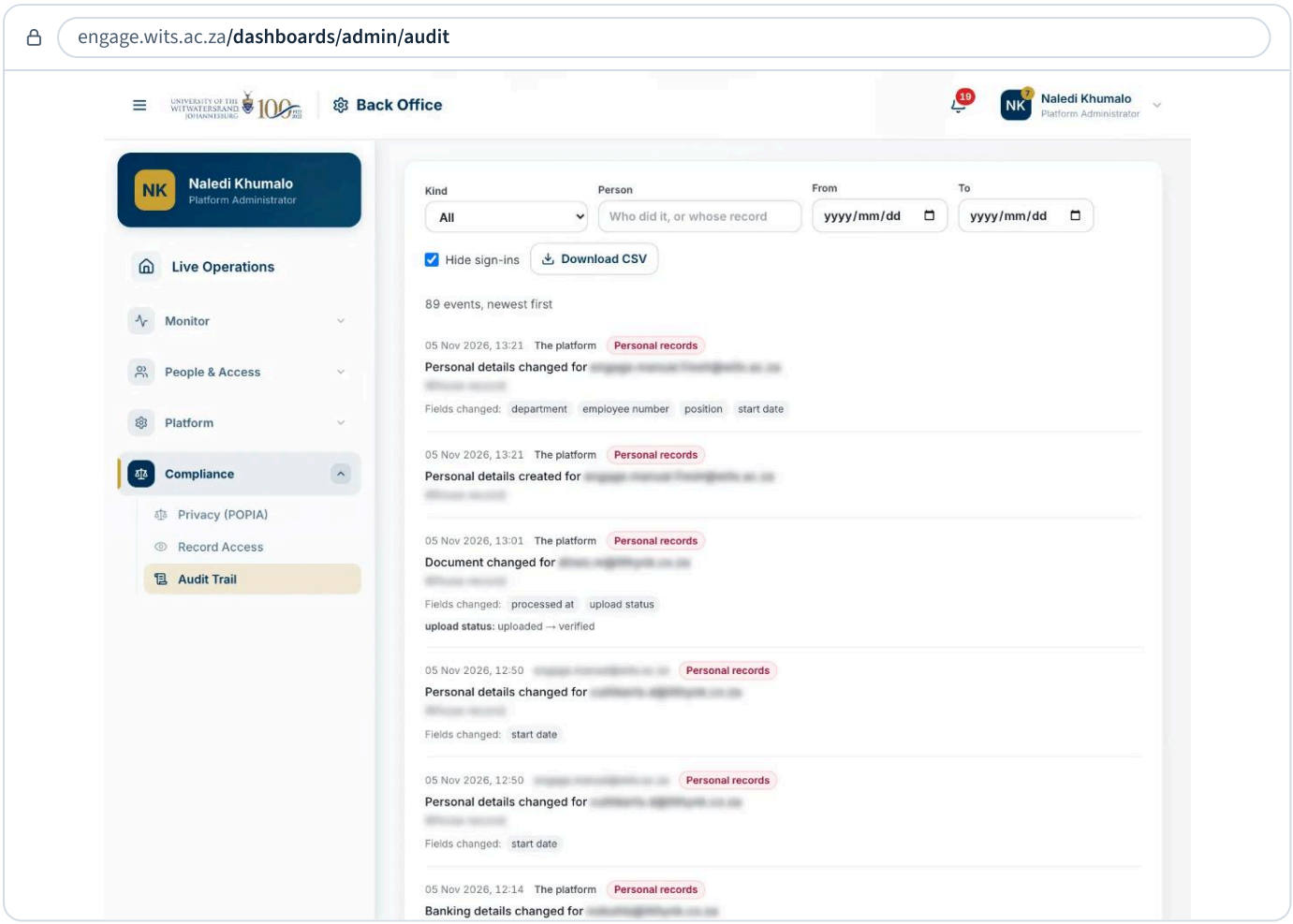
1. Under **Views**, type the person's email address in **Whose record**, or the viewer's in **Who looked**.
2. Narrow it with **Kind of record**, **From** and **To**. Leave **Hide list views** ticked to see only single records.
3. Select **Search**. Each line shows when, who looked, what, whose record and where. **Download CSV** saves the list as a file that opens in Excel.

People opening their own records are not listed, and opening the same record again within 5 minutes counts once. Opening 25 or more different people's records within 10 minutes raises an alert. Nobody can change or delete these entries. Only views through Engage's own pages are recorded.

Search the audit trail

The audit trail records every sign-in, role change, service key change, job run, link and Oracle mapping change, and every change to a personal or financial record. Nobody can change or delete it, administrators included. Entries about personal records name the fields that changed, never what they were changed to. Role changes name the roles, as on Accounts & Roles.

1. Open **Compliance** › **Audit Trail**.
2. Choose a **Kind**: **Sign-ins and roles**, **Service keys**, **Personal records**, **Scheduled jobs**, **Links** or **Oracle mappings**.
3. In **Person**, type who did it or whose record it was. Set **From** and **To** dates, and tick **Hide sign-ins** to leave out ordinary sign-ins.
4. To keep a copy, select **Download CSV**. It saves the entries matching your filters as a file that opens in Excel.



Each entry says who did what, when, and whose record it was.

REFERENCE

Words and contacts

The words this manual uses that you may not meet every day, and who to ask when something goes wrong.

Words used in this manual

For everyone · in alphabetical order

Access level
What doors and areas an access card opens: Basic, Extended, Research or Administrative.

Access review
A regular check that everyone with more than everyday access to Engage still needs it.

Alert
Engage's own notice that something has gone wrong. It is usually raised and cleared automatically.

Applause
A one-tap "well done" on a recognition.

ATR (Annual Training Report)
The training staff did last year, sent to the SETA by 30 April.

Audit trail
The permanent record of who changed what in Engage. Nobody can edit or delete it.

Branch code
The six-digit number that identifies a bank. Most South African banks use one "universal" code for every branch.

Bursary agreement
The terms you accept before Wits pays, including when the bursary becomes a loan.

Bursary cap
The most Wits will pay in a year for one kind of study.

Calendar file
A small file that your calendar, such as Outlook, opens to add an event.

Campaign
A request from HRDU to a group of staff to build one skill to a set level by a date.

Capstone
The final step that pulls a development pathway together.

Celebration card
A card with a message, sent to a colleague for a birthday or work anniversary.

Clause
A numbered section of a policy document.

Collection
A shelf of LinkedIn Learning courses that HRDU chooses for one group of staff.

Community of practice
Colleagues in the same kind of work who learn from each other.

Competency
A capability Wits staff are expected to build, made up of weighted skills.

Convener
The person who runs a community of practice.

Cost to company (CTC)
Your total yearly package, including benefits.

Dashboard
A work area in Engage. Everyone has the Employee Portal, and each extra role adds one.

Debit order
A standing instruction that lets the medical aid take its monthly payment from a bank account.

Dependant
A child, stepchild, adopted child or grandchild who depends on you.

DOI
A permanent reference number for a published article, used to find it online.

Feature switch
An on/off control in the back office that stops one part of Engage, such as reminder emails, without other changes.

Fresh sign-in
Signing in again before a sensitive action, when your last sign-in is too old.

IBAN
The international number that identifies one bank account.

Idle licence
A LinkedIn Learning seat with no activity for the idle period (60 days unless changed).

Indicative level
The rough level on My Skills, based on how many courses you finished in a skill.

Information Regulator
The body that oversees POPIA, and must be told about any security compromise.

Intervention
One piece of training counted in a SETA report, such as a short course, an online course or a bursary.

CSV file
A simple spreadsheet file that opens in Excel.

Death benefit lump sum
A once-off amount paid out if you die while a member of the retirement fund.

Demand target
A required level HRDU sets for a competency and a group of staff.

Development pathway
A sequence of courses that staff development sets out for a job family.

Evidence unit
One completed course or verified certificate on a skill. Endorsements count, up to two.

Foundation to Mastery
The five levels Engage works out from completed courses: Foundation, Developing, Proficient, Advanced and Mastery.

HRDU
The Human Resources Development Unit, the Wits team responsible for staff development.

ICT Service Desk
The Wits IT help desk, for sign-in, VPN and other technical problems.

Incident
A problem serious enough to need an owner, a stage and a written timeline.

Information Officer
The University official responsible for POPIA compliance.

Interest-free loan (bursary)
What a bursary becomes if the course is failed or not finished, or the person leaves Wits soon after. It is repaid from salary.

Investment profile
How your retirement savings are invested: Growth, Conservative, Capital Protection or Shariah.

Job family
A group of related jobs, such as finance or IT.

KPI
Key performance indicator: a measure an organisation tracks.

Leaderboard
Who has earned the most points, or given or received the most recognition, in a week, month, quarter or year.

Licence (LinkedIn Learning)
Permission for one person to watch LinkedIn Learning courses. HRDU hands them out.

Maintenance mode
Closes Engage to everyone except administrators. Staff see a "Back shortly" page.

Medical aid certificate
A letter from a medical aid showing that the staff member already belongs to it.

Net Promoter Score (NPS)
The share of people who answer 9 or 10 to "how likely are you to recommend…", minus the share who answer 0 to 6. It runs from −100 to 100.

NQF
The National Qualifications Framework, levels 1 to 10. Level 7 is a bachelor's degree and level 10 a doctorate.

OFO code
A national occupation code (Organising Framework for Occupations) that the SETA uses to group jobs.

Operator
An outside organisation that processes personal information for the University.

Oracle Learning Management
The Wits system for compliance and mandatory training. It is not yet connected to Engage.

Knowledge check
The same short questions answered before and after learning. The difference is what you gained.

L1 to L4
The four levels of learning evaluation: reaction, learning, behaviour and results.

Level
Beginner, Novice, Intermediate, Advanced or Expert, set by every point you have ever earned. It never resets.

LinkedIn Learning
The online course library Wits pays for, with one seat (licence) per person.

Mandatory training
Training every new staff member must complete, due 30 days after Engage first holds their record.

Milestone
A colleague's birthday or work anniversary.

Next of kin
The person Wits contacts in an emergency.

Occupational level
One of the six SETA job levels, from top management to unskilled. It decides a person's row in a SETA report.

Onboarding
The five steps a new staff member completes in Engage: personal profile, banking, medical aid, retirement fund, and campus access and parking.

Oracle
The University's Oracle HR system. Oracle codes are the values it uses for each choice.

Page guide
The "What am I looking at?" panel that explains the page you are on.

PAS staff
Professional, administrative and support staff, as opposed to academic staff.

Pensionable salary
Your cost to company multiplied by your RFI percentage.

Points
Credit you earn for taking part in Engage. Every award is listed on your points page.

POPIA
The Protection of Personal Information Act, which governs how the University holds personal information.

Proof of registration
The institution's document showing that you are registered for the course.

Retention rule
How long a kind of record is kept before Engage deletes it.

Role
What you are allowed to do in Engage, such as HR or medical aid officer. Each role opens a dashboard.

Scheduled job
A task Engage does by itself on a timetable, such as sending reminders.

Service key
The password Engage uses to reach an outside service, such as LinkedIn Learning or email, on the University's behalf.

SLA
The longest a document should wait before it is checked: seven days here.

Succession slate
A record of a capability judged critical, and the people being developed to hold it.

Switchboard
The University's main phone number, +27 11 717 1000, which puts you through to the right office.

Peer reviewed
Checked by independent experts before it was published.

Platform Administrator
The role that opens the back office. On its own it opens no staff records.

Poll
A quick question on the Social Feed that colleagues vote on.

Proof of banking
A bank-stamped letter or statement confirming who holds an account.

Recognition
A public thank-you to a colleague for one of the five Wits values: Excellence, Innovation, Collaboration, Integrity and Growth.

RFI (retirement funding income)
The share of salary on which retirement contributions are worked out. Staff choose between 55% and 100%.

Role type
Academic, professional, technical or leadership.

SCN1
The Information Regulator's form for reporting a security compromise.

SETA
The ETDP SETA: the sector education and training authority Wits reports its staff training to each year.

Strength
How much of a competency's skill weight a person holds, scaled by how many courses back it.

SWIFT/BIC
The international code that identifies a bank.

Third-party account
A bank account held by someone other than the staff member.

Tier 1, 2 and 3
Competencies expected of every member of staff, of a role type, or of one job family.

Two-person approval
A sensitive role only takes effect once a second administrator approves it.

VPN
The University's secure link to the Wits network when you are off campus.

Watchdog
Engage's own check every five minutes. It raises alerts and emails them.

Wits 2033
The University's strategic plan, running to its centenary in 2033.

WSP (Workplace Skills Plan)
The training planned for this year, sent to the SETA by 30 April.

Who to contact

For everyone

When	Contact
You cannot sign in, or Engage will not open from home	ICT Service Desk · IThelp@wits.ac.za · +27 11 717 1717
Your contract, personal details or onboarding	Human Resources, through the University switchboard · +27 11 717 1000
Payroll, retirement fund or medical aid	Remuneration, Pensions & Medical Aid, through the switchboard · +27 11 717 1000
A workplace concern, grievance or dispute	Employee Relations, through the switchboard · +27 11 717 1000
Training, bursaries, LinkedIn Learning or your development plan	The Human Resources Development Unit (HRDU)
Something in Engage looks wrong	Tell HR from **Feedback & Surveys** › **Feedback to HR**, or the ICT Service Desk

You can also send a question to HR from inside Engage; see Send a question to HR.

Wits Engage user manual · November 2026 · Screens in this manual show an example staff member. Other people's names and contact details are blurred.