Sage

Document Control and Administration Policy

Version Control:	Prepared by:	Gerhard van der Berg	Document QMS Ref:	SAGE/TAPP/001
	Quality Controlled by:	Ravin Rughoonandan		
	Edited by:	Gerhard van der Berg	Document Version:	2019.01
	Review Date:	19/07/2019	Next Review Date:	01/10/2020
	Approved By:	Pragasen Moodley	Approval Date:	20/08/2019

Policy Name
Table of Contents

Contents

Document Control and Administration Policy

1.1 Change Control

Version	Author of Change	Date	Details of Change
2019.01	Gerhard van der Berg	July 2019	Policy updated & amended to suit new organisation structure of Sage.

1.2 Record of Approvals

Level*	Committee Name	Date
1	Ravin Rughoonandan (Content Design Manager)	July 2019
2	Pragasen Moodley (Director, Learning Services AME)	July 2019
3	Candice Govender (Legal Director, AME)	July 2019
4	Pieter Bensch (Executive Vice President, AME)	July 2019

* Level of approval

Document Control and Administration Policy

2.1 Purpose and Objective

The purpose of this policy is to ensure Sage has records of all learners' who have booked for training and that all records are kept safe and secure.

2.2 Policy Requirements

This policy is in place to ensure that the information captured is compliant with legal requirements and Sage has a record of all learners and are kept safe and secure.

2.3 Booking Form Scope

Activity / Deliverable	Responsibility	
	Design	Use
Manual Booking Forms (Classroom / Seminars)	Gerhard van der Berg	Training Sales Marketers send to Customers
Online Booking Form for Seminars	Gerhard van der Berg	Customers
Online Booking (Sage U)	Internal Systems	Customers
Online Booking System 2 (Training Zone)	Internal Systems	Customers
Online Booking System 3 (CRM)	Internal Systems	Training Sales Marketers Payroll & HR add information about customers

2.3.1 Manual Booking Forms (Classroom / Seminars)

Classroom:

Some learners will complete the following form when booking a training course:

In terms of our accreditation, Sage is required to give statistical reports regarding the delegates that attend training. Please take a few minutes to complete the following demographic and current skills level information. These statistics ensure that Sage's training meets the needs of all our attendees.

Course Name									
Course Date					Venue				
Are you an Existing Sage user	YES	NO	If YES: Please enter acc no. with Sage						
Sage Serial No or Customer No									
Company Name					Company VAT No				
Title				Initials					
First Name									
Surname									
ID Number									
Date of Birth	D	D	M	M	Y	Y	Y	Y	
Gender	Male	Female	Equity						
Nationality				Citizen Resident Status					
Food Preference	Vegetarian:				None:				
Socio Economic Status	Employed	Unemployed	Disability Status						
Home Language			Geographical Area (province)						
Work No			Mobile No			Fax No			
Postal Address									
E-Mail Address									
Preferred Communication Method	Fax	E-mail	Highest Education						

Direct Deposit / EFT for R_____ (PLEASE ATTACH PROOF OF PAYMENT)

Account Details: Pastel Software, Nedbank, Sandton, Branch Code: 19-70-05, Account No: 1970 572752

I hereby agree to the above terms and conditions.

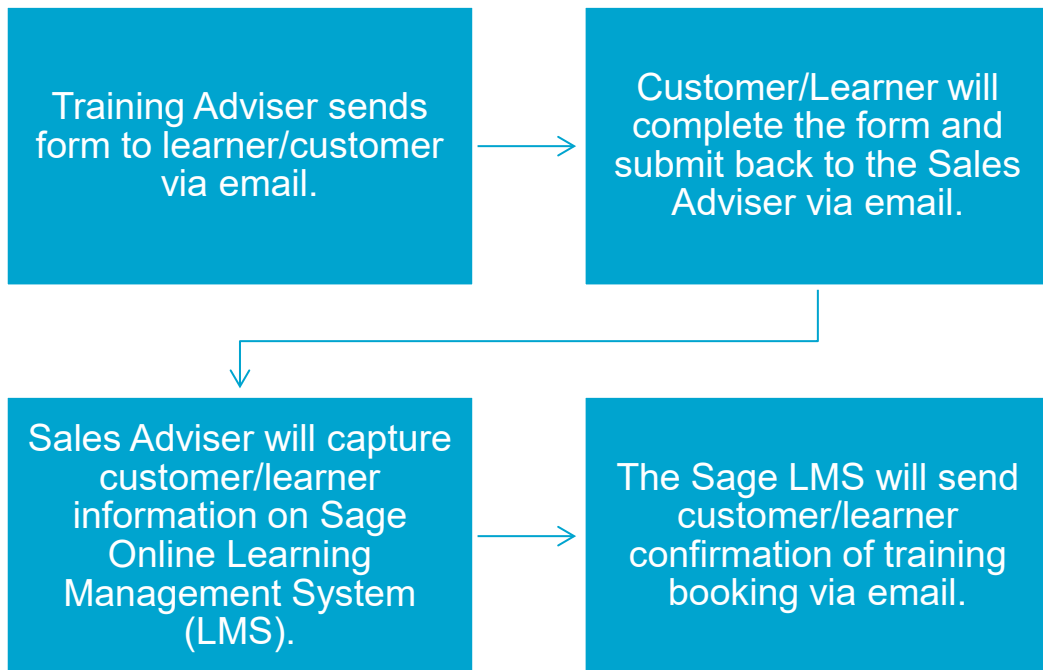Applicant's Signature: _____ Date: _____/_____/_____

Seminar:

Some learners will complete the following form when booking for a seminar course (Example: Mid-Year Tax Update Seminar):

---

sage Seminars

2019 Mid-year Payroll Tax Update Seminar

Complete this section and return to the Sage Seminars team.

Company:	
Tel no.:	Email address:
Account Number / SITE Code:	

Delegate 1 information:

Name & surname:	
Email address:	
Contact no.:	Meal Preference (Allergies):
Venue:	

Delegate 2 information:

Name & surname:	
Email address:	
Contact no.:	Meal Preference (Allergies):
Venue:	

Delegate 3 information:

Name & surname:	
Email address:	
Contact no.:	Meal Preference (Allergies):
Venue:	

Authorised Signature: _____ Name: _____ Date: _____

Terms and Conditions:

Sage Cancellation Obligations:
Sage reserves the right to cancel courses for any reason, including when course registrations do not meet minimum levels. Sage University will notify attendees of a cancelled course at least 2 calendar days prior to the course start date. In this case, registration fees will be refunded to the original form of payment. Sage is not responsible for airfare penalties incurred because of cancelled courses. Sage will not reimburse registrants for any travel or hotel cancellation fees or penalties.

Attendee Cancellation Obligations:
Attendees may cancel or transfer to a different course date without penalty up to 14 calendar days prior to the course start date. Attendees that cancel or request transfers less than 14 days prior to the course start date will incur a R1000 Service Fee. The Service Fee will be charged to the payment method used to originally purchase the course. Cancellations received less than 48 hours prior to the course start time will result in forfeiture of the course fee.

📞 +27 12 420 7000   ✉ training.za@sage.com   ☁ www.sage.com/ZA

Procedure:

The process flow as follows:

Training Adviser sends form to learner/customer via email.	**Customer/Learner will complete the form and submit back to the Sales Adviser via email.**
Sales Adviser will capture customer/learner information on Sage Online Learning Management System (LMS).	**The Sage LMS will send customer/learner confirmation of training booking via email.**

2.3.2 Online Booking Form for Seminars

Some customers/learners will make use of an online form to complete a booking for a Seminar session. This is normally displayed on the Sage website or sent out via an email communication mailer to the customer/learner:

https://learning.sage.co.za/authorized-learning-partner.html

Duration: 09h00 – 12h30

Date: Various options available on the booking form

Pricing: R 2 350pp (excl.VAT)
Seminar Loyalty Club members: R 2 150pp (excl.VAT)

Speaker:

Rob Cooper:

Rob Cooper completed his B.sc in Computer Science at the University of Pretoria in 1971. Many years of design and programming of various financial systems followed, including the development of payroll systems for different environments.

Over the last fifteen years, his focus has been on the numerous pieces of legislation that govern the employment and payroll industry and he is a respected expert, presenting at tax seminars and workshops.

Email address

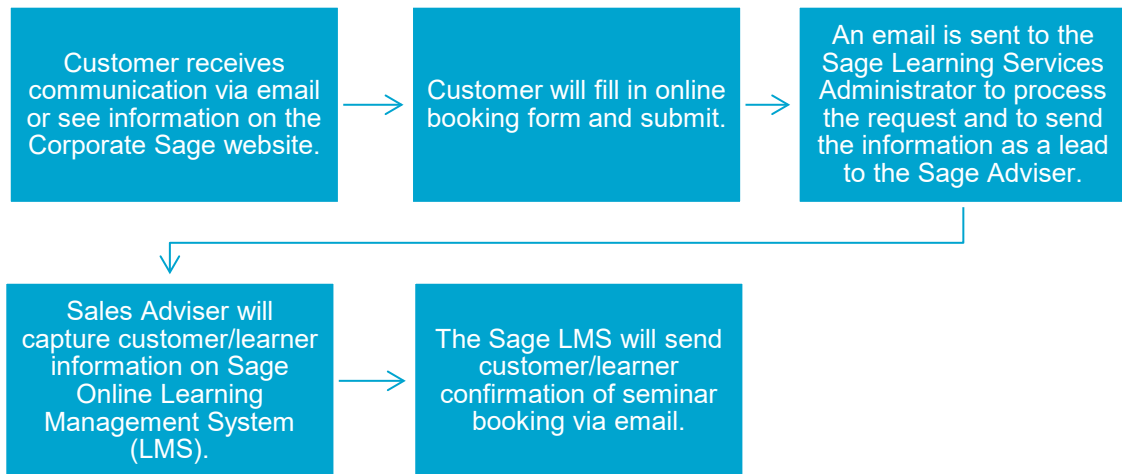First name

Last Name

Company/Organisation

Account/Site Code

Date and Venue

☐ I accept the Terms and Conditions

As a Sage customer we send you email marketing communications from time to time. You can modify your marketing preferences, or unsubscribe, at any time by visiting our Preference Centre.
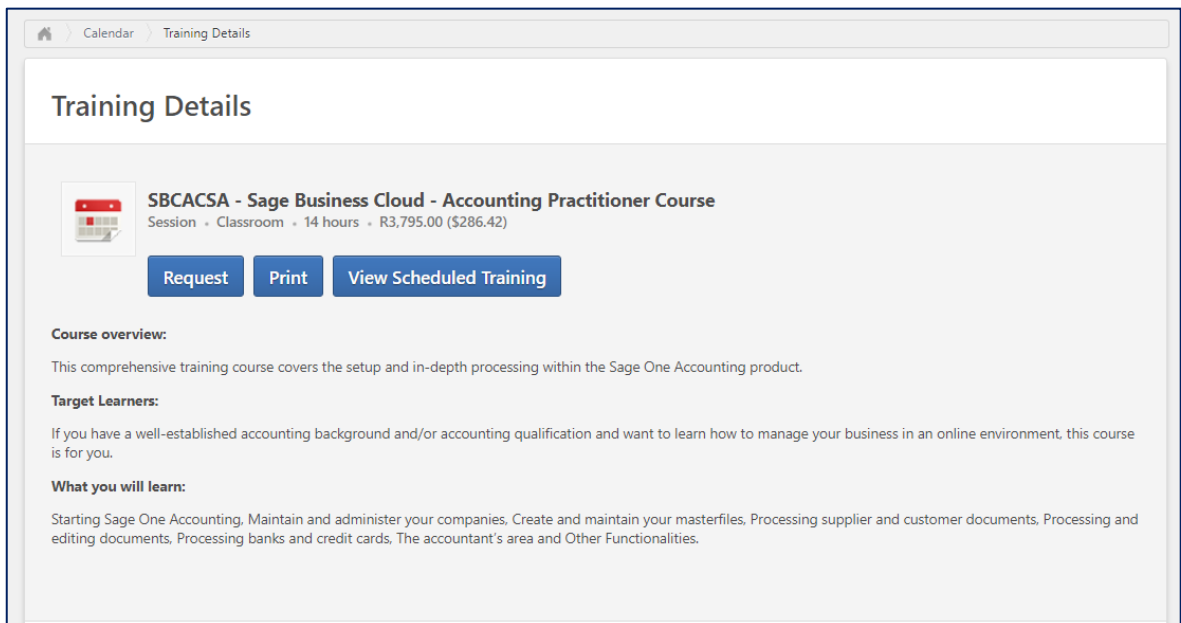
[Register]

Procedure:

The process flow as follows:

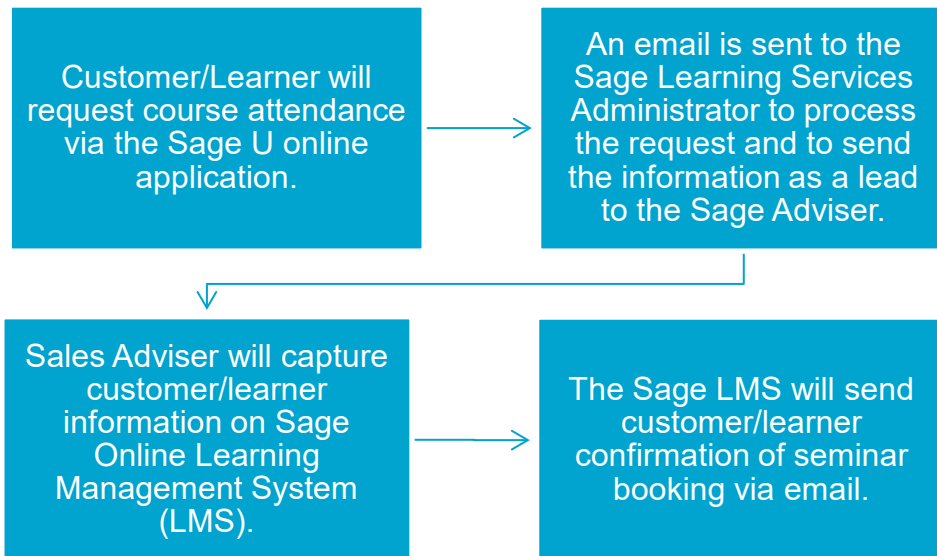## 2.3.3 Online Booking on Sage University

Some customers/learners will make use of an online booking system to book for a training course. This is displayed on the Sage University website:

Procedure:

The process flow as follows:

2.3.4 Online Booking on Training Zone

Some customers/learners will make use of an online booking system to book for accounting training courses. This is displayed on the Sage Training Zone website:

Bookkeeping Fundamentals (**1 August 2019 - 2 August 2019**)

Overview
This comprehensive training programme covers the basic bookkeeping terms and concepts. This is a non-computerised course. View full course outline

Target Learners
This course has been designed for learners who are required to work with accounts, and who have had little or no exposure to bookkeeping.

Duration
This is a two day (12 hour) course.

Delivery Methods
The delivery methods include self study and facilitated workshops.

Cost
R 4 922.00

Available Spaces
10

Date / Time
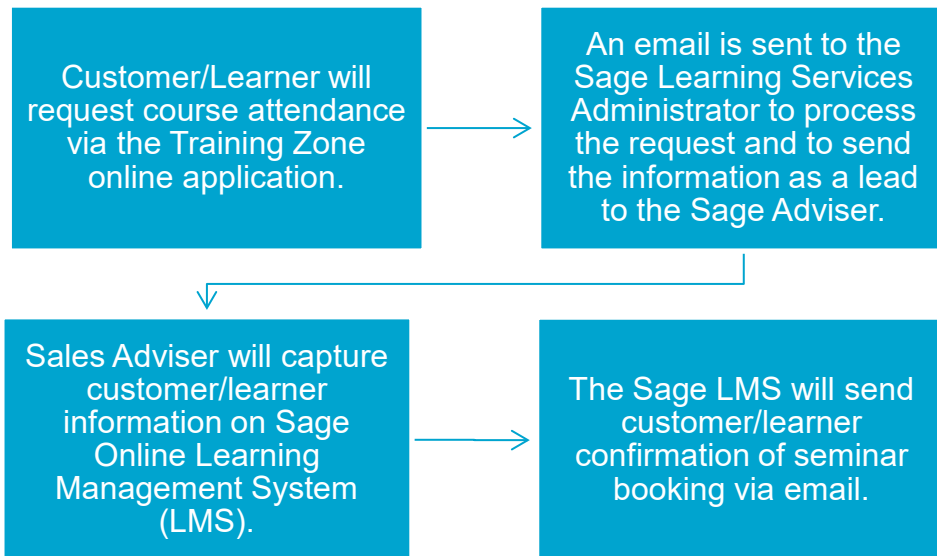1 August 2019 - 2 August 2019 (09:00 - 16:00)

Location
Johannesburg - Midrand (Bytes T04_16)

Address
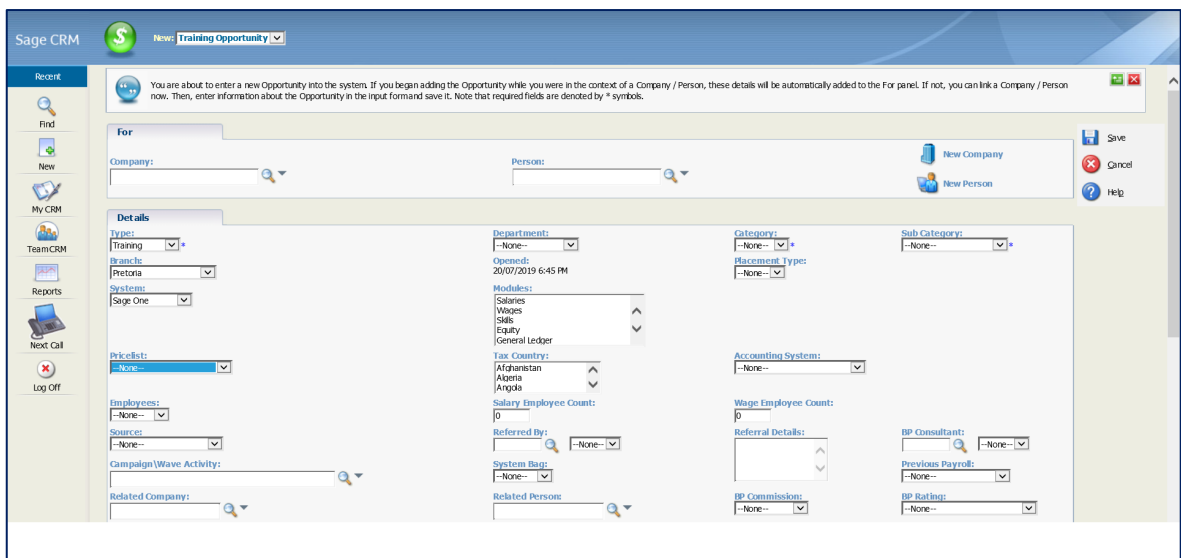Bytes Technology Group, 241 3rd Rd, Halfway Gardens, Midrand

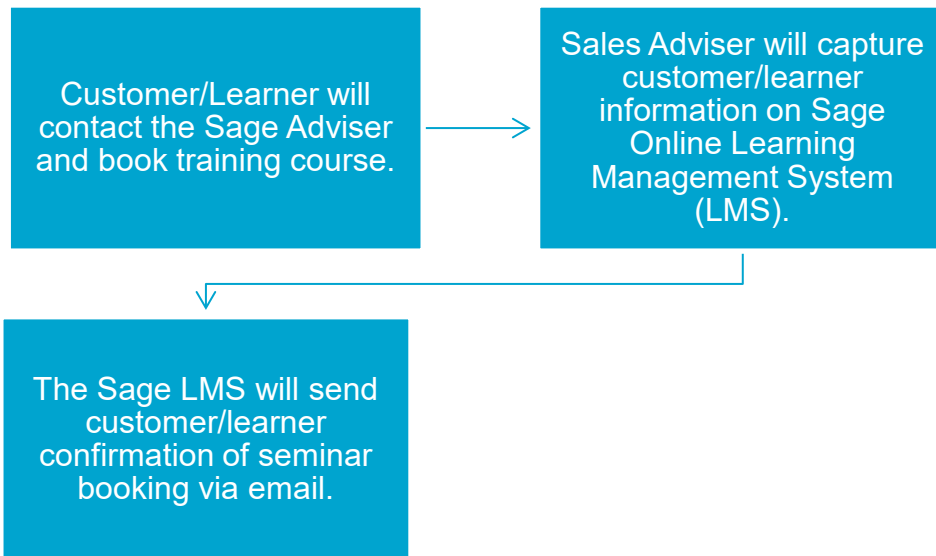Book Training

Procedure:

The process flow as follows:

2.3.5 Online Booking on CRM

Payroll & HR customers will contact the Sage Adviser directly via telephone and will request training. Once Sage Adviser gives approval of available dates, the Sage Adviser will add the customer details on the online CRM software:

Procedure:

The process flow as follows:

```
┌─────────────────────────┐         ┌─────────────────────────┐
│                         │         │ Sales Adviser will      │
│  Customer/Learner will  │         │ capture                 │
│  contact the Sage       │ ───────▶│ customer/learner        │
│  Adviser and book       │         │ information on Sage     │
│  training course.       │         │ Online Learning         │
│                         │         │ Management System       │
│                         │         │ (LMS).                  │
└─────────────────────────┘         └─────────────────────────┘
              ┌─────────────────────────┐
              │                         │
              │  The Sage LMS will send │
              │  customer/learner       │
              │  confirmation of seminar│
              │  booking via email.     │
              │                         │
              └─────────────────────────┘
```

2.5 Process of Manual paperwork

All manual booking forms are uploaded to a SharePoint drive and only Learning Service employees have access to this system. All paperwork are shredded.

2.6 Record keeping timeline

All learner records are kept on the database for a period of 5 years as per Legal Requirements.

3. Contacts

Should you have any questions about the content of this policy please contact the training department via email: Training.Za@sage.com.