HEQF-online User Manual
Institutional Administrator

V1.0

TABLE OF CONTENTS

1. INTRODUCTION

The HEQF-online system has been developed to facilitate the online submission, processing and tracking of applications for programme alignment.

The system allows institutions to seamlessly submit, track and process applications for programme alignment.

This manual seeks to guide an institutional administrators tasked with the alignment process.

In this manual, single quotation marks (' ') are used to indicate a link or a button to be clicked, in the HEQF-online System.

Italics are used to indicate a page or dialogue box which is opened.

For example, 'HOME' is a link to the *Home* page.

2. SYSTEM ACCESS

2.1 Login

The HEQF-online System is web browser based.

Type the following URL in the Address bar to access the system: http://heqf-online.che.ac.za/

- The HEQF-online landing page will display as follows:

On the right side of the *landing page* the login will display as follows:

To log in, enter your email address and password and click the 'Login' button.

2.2 Register a new account

A new user can register an account, click on the 'Register a new account' link found below the 'Login' button on the right of the screen.

The new user must complete the required fields.

*Note: All compulsory fields are marked with a *.
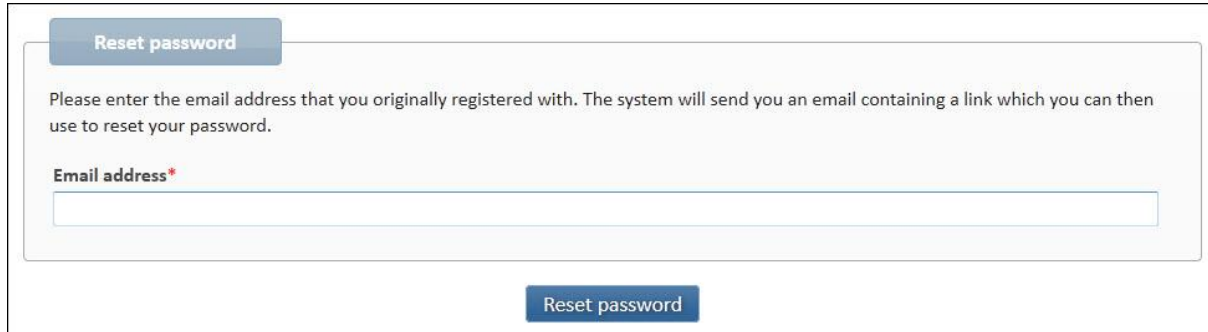
Once the new user has completed all fields, click on 'Register account' and a new account will be created for the user.

2.3 Forgotten password / Reset password

If the user has forgotten their password, it can be reset by clicking on the 'Reset your password' link found below the 'Login' button on the right of the screen.

The *Reset password* page will display as follows:

Enter the user email address and click on 'Reset password.' The system will generate a random password and it will be emailed automatically.

Log on using the password that has been emailed.

*Note: It is recommended that a password that is easy to remember is selected.

2.4 Resend account activation e-mail

Please enter the email address that was submitted during registration. An email containing the password and an activation link will be sent to the email address entered.

2.5 Once logged in

The CHE administrator is responsible for managing HEQF-online applications submitted to the CHE by institutions.

The *Home* page contains an overview of the functionalities available to the administrator:

1. **Home**: Returns the user to this page from anywhere in the system.

2. **Applications**: View the submitted applications and return them to the institution if necessary.

3. **Users**: Manage the users for your institution. The administrator can add or change institutional administrators.

4. **Help**: Access the HEQF-online user manual.

5. **Logout**: Logout the system.

2.6 Site navigation

To navigate through the site, use the Main Menu:

The **Main Menu** bar across the top of the screen has the following menu items:

1. **Home:** Navigates the user to the *Home page* that displays after login.

2. **Applications:** Displays a list of all the active applications available for view.

3. **Users:** Displays a list of users with details of each user.

4. **Help:** Displays a downloadable version of the manual in PDF format.

5. **Your account:** Displays the logged in user's details.

6. **Logout:** This ends the user's session and returns the user to the *login page*.

All functionalities available to the administrator are described in detail below:

2.6.1 Home

You are logged in as an Institutional administrator.

The Institutional administrator is responsible for managing the data capture of HEQF applications and then submitting them to the CHE.

The process of data capture and submission of HEQF alignment applications is as follows:

1) Download the template:

Click on the 'Download template' button to save the Excel spreadsheet on the computer for later editing.
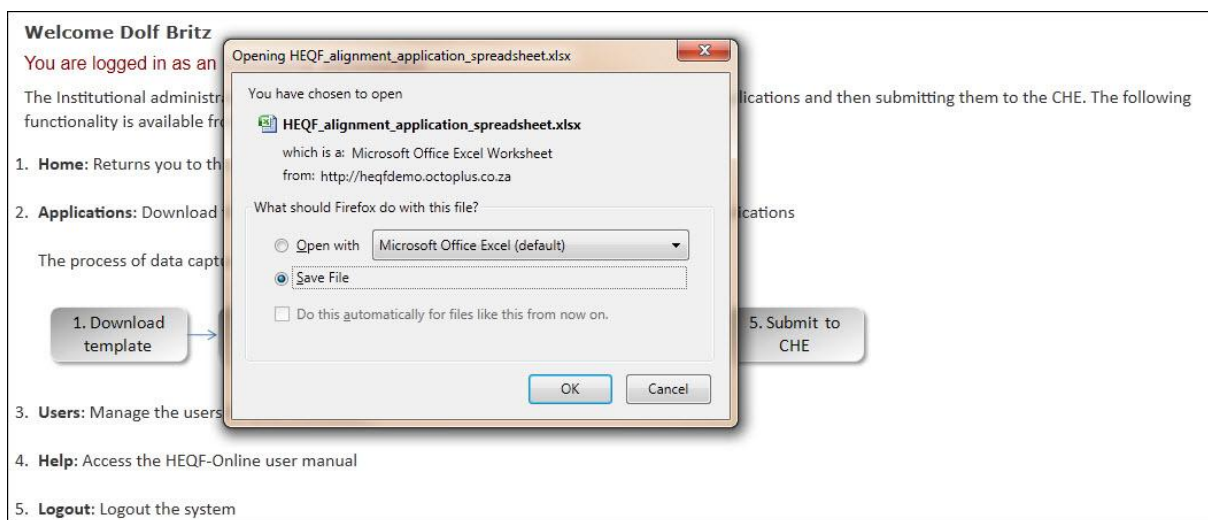
*Note: When logged in as a private institution administrator the private form will download, and when logged in as a public institution administrator the public form will download.

2) Extract HEQC data

*Note: The user can download data from the HEQC-online system to assist in completing the template, to do this follow the instructions below:

On the Main menu, click on the 'Applications' link:

In the actions bar on the right, click on 'Extract HEQC data'

Click on the 'Extract data for users institution' link to extract existing application data for your institution in HEQC-Online into an Excel spreadsheet. The fields extracted will have the same column headings as the fields in the HEQF alignment application spreadsheet.

Save the file on the computer. This file can now be used to copy and paste data into the template file.

3) Complete template

The template that will be downloaded by clicking on 'Download template' will be in excel format with the following tabs:

- ➢ **S1 Existing qualification info**
- ➢ **S1 Help**
- ➢ **S2 Amended qualification info**
- ➢ **S2 Help**
- ➢ **General Help**
- ➢ **CESM**
- ➢ **CESM First Qualifier**
- ➢ **CESM Second Qualifier**
- ➢ **Provider Type**
- ➢ **Mode of Delivery**
- ➢ **Program Type**
- ➢ **NQF level**
- ➢ **HEQF Alignment Categ**
- ➢ **Module Type**
- ➢ **Year of Study**
- ➢ **Qualification Type**
- ➢ **Qualification Designator**
- ➢ **HEMIS Existing Qual Type**
- ➢ **HEMIS Amended Qual Type**
- ➢ **Funding Level**
- ➢ **HEMIS Qualifiers**

*Note: Legend:

🟥	**Must be completed**
🟩	**Help Sections**
🟦	**Information to assist you**

At this time, the administrator can start to copy and paste the information that is in the excel sheet that was downloaded at the beginning ('Extract HEQC data')

When comparing the two sheets, the user will see that there are columns with the same name; these columns can be copied (column by column) into your template:
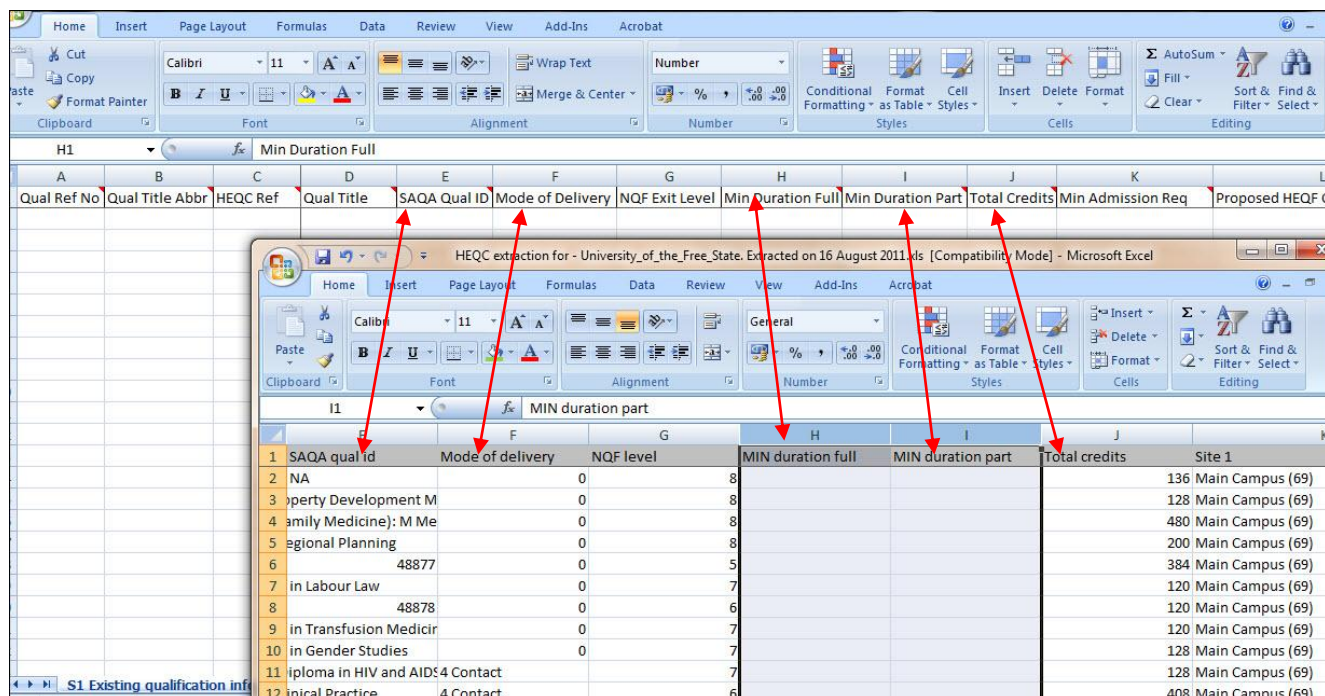
*Note: Be careful NOT to copy the whole sheet into your template, as the columns will NOT correspond, rather copy column, by column.

Once the user has copied all the information into his template, the HEQC data sheet can now be closed.

4) Bulk Import

The rest of the fields in the document must be completed, once the document is ready, the user can click on the 'Bulk import' button:

The user can browse for the saved document, and click the 'Import 'button:

The system will start to import your data:

Importing data COMPLETE
Verifying data 80%
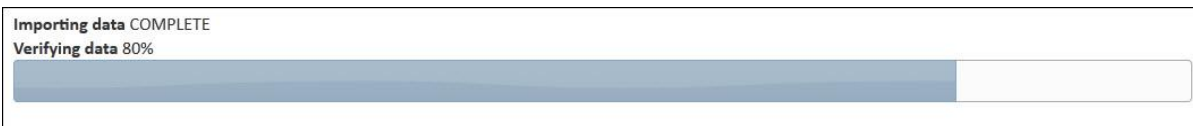
A report of which files were uploaded will be displayed:

	Section 1: Existing qualification	Section 2: HEQF qualification
Total records in file	16	3
Total passed validation	0	0
Total failed but may be imported	0	0
Total core failed - not imported	16	0
Duplicate errors - not imported	0	0
Submitted errors - not imported	0	0
Category errors - not imported	0	-
Total records where the corresponding qualification number was not found in Section 1	-	3

Definitions:

Total records in file:	The number of records in the template that the user imported to the system.
Total passed validation:	The records contain all required data and will be able to be submitted to CHE.
Total failed but may be imported:	Shows the number of records that had some field that is not correct. The field and the problem will be listed in the detailed report below. The user can still import but it is not recommended if all records are failing. It is recommended at the point where the user will no longer upload from the Excel spreadsheet but will rather continue editing online. ***Note: Online edits WILL be overwritten if the spreadsheet is re-imported.**
Total core failed – not imported:	The number of records that failed because it was missing core information.
Duplicate errors – not imported:	The number of duplicate records that were not imported.
Submitted errors – not imported:	The record has already been submitted and may no longer be re-imported or edited because CHE is already evaluating it.
Category errors – not imported:	Category A does not have a corresponding record in section 2. Record won't be imported.

Total record where the corresponding qualification number was not found in section 1:	This is when records are found in section 2 with a Qual Ref No that does not have a section 1 record.

Any record that failed to upload will be described in the detailed report:

Detailed report for Section 1

S1 Existing qualification info

Record No	Qualification reference	Field failed	Validation message
2		Qualification reference number	Core error: Compulsory field
3		Qualification reference number	Core error: Compulsory field
4		Qualification reference number	Core error: Compulsory field
5		Qualification reference number	Core error: Compulsory field
6		Qualification reference number	Core error: Compulsory field
7		Qualification reference number	Core error: Compulsory field
8		Qualification reference number	Core error: Compulsory field
9		Qualification reference number	Core error: Compulsory field
10		Qualification reference number	Core error: Compulsory field
11		Qualification reference number	Core error: Compulsory field
12		Qualification reference number	Core error: Compulsory field
13		Qualification reference number	Core error: Compulsory field

Detailed report for section 2

S2 Amended qualification info

Record No	Qualification reference	Field failed	Validation message
2	1	Qualification reference number	Corresponding qualification number not found in Section 1. This record will be discarded
3	2	Qualification reference number	Corresponding qualification number not found in Section 1. This record will be discarded
4	3	Qualification reference number	Corresponding qualification number not found in Section 1. This record will be discarded

The uploaded applications can now be accepted or discarded.

The administrator has the option to download the report by clicking on the 'Download Report' button.

The 'Actions' bar will display the following options:
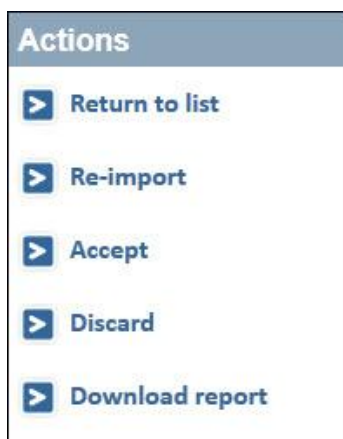
- ➢ Return to list: Return to the list of applications on the 'Applications' page.
- ➢ Re-import: Enables the administrator to re-import the template again.
- ➢ Accept: Administrator can accept all uploads.
- ➢ Discard: Administrator can discard the uploads.
- ➢ Download report: Administrator can download his report here.

5) Validation error messages

1. Corresponding qualification number not found in Section 1. This record will be discarded
2. Core error: Compulsory field
3. Please enter the abbreviation of the qualification title
4. Please enter the proposed teach-out date
5. The NQF level must correspond with the qualification type
6. The total credits must correspond with the credits for the qualification type selected
7. Please specify the graduate attributes / exit level outcomes
8. Please specify the articulation and progression
9. Please specify the Qualification Rationale
10. Please supply a description of whether the programme is structured or whether there are electives
11. Please provide a description of the how assessment is integrated
12. Please enter the minimum admission requirements for the existing qualification
13. Please enter major fields of study by second or third order CESM category
14. Please enter HEMIS qualification type
15. Please enter HEMIS minimum experiential time
16. Please enter total subsidy units
17. Please specify the funding level
18. Duplicate qualification number. This record will be discarded.
19. Please provide a description of the how assessment is integrated
20. Category A selected, but corresponding qualification has not been found in section 2. This record will be discarded.

6) List of core fields

1. Qual Ref No
2. Qual Title
3. NQF Exit Level
4. Total Credits
5. Proposed HEQF Category

Data corrections:

Once the user has done the 'Bulk import' the system will show which files have been accepted, and which requires corrections.

*Note: The data corrections might have to be done several times, until the system accepts all the corrections.

Submit to CHE

The administrator can submit his applications to the CHE for approval by clicking on the 'Submit to CHE' button, which will direct back to the 'Applications' page:

2.6.2 Applications

This page will display all the applications listed for the logged in administrator.

The administrator can select several applications by ticking the checkbox on the left of each application, or all applications can be selected at once by ticking the 'All' box located top left of the table list:

The administrator can search for an application by entering a specific reference number:

Applications can be sorted by a certain heading by clicking on the chosen column title:

*Note: In this example the applications were sorted by 'Qualification Reference' therefore the icon is only one highlighted green triangle.

The administrator can navigate to the next and previous pages by clicking the following buttons:

To view all the applications that require corrections, click on the 'Need corrections' button:

To view all the applications that is ready to be submitted to the CHE, click on the 'Ready for submission' button:

To view all the applications that have already been submitted to the CHE, click on the 'Submitted' button:

To view all applications, click on the 'All' button:

The 'Action'" bar will be displayed on the right of the page:

➢ Extract HEQC data	Data that is already stored in the HEQC system can be downloaded to assist in completing your template.
➢ Download template for bulk import	Empty template for new application can be downloaded.
➢ Help	Opens the *Help* page where the manual can be downloaded in PDF format.

1) Delete applications

With selected applications the administrator can delete selected records by clicking on the 'Delete' button:
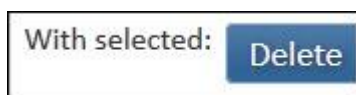
2) Assign to user

When clicking on the 'Assign to user' button, a pop up window will display, with a list from which you can choose to which user you would like to assign the application to:

*Note: A pop up window with an alert to confirm whether you would like to perform the action will appear on all these buttons.
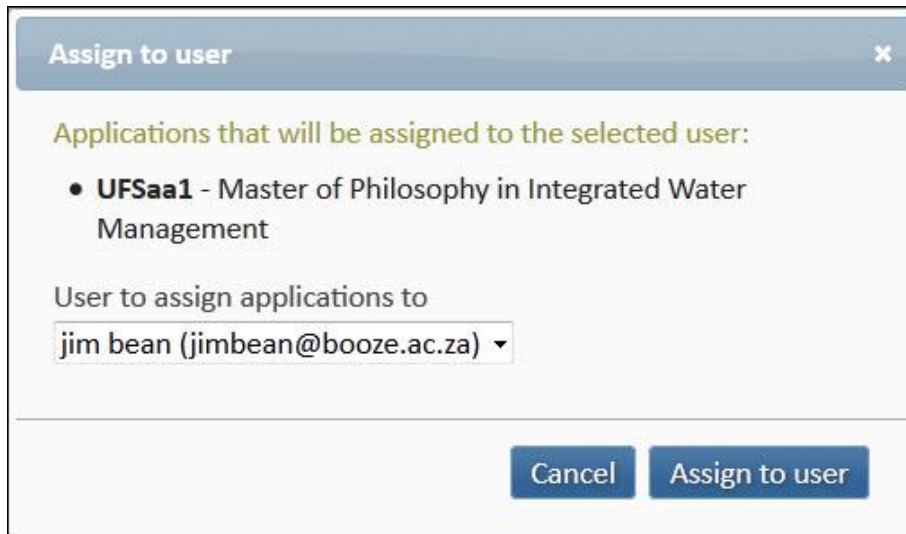
3) Submit applications to CHE

The administrator can submit applications to the CHE by clicking on the 'Submit to CHE' button:

4) Take applications back

The administrator can take applications back that have not been submitted to the CHE, by clicking on the 'Take back' button:

*Note: The 4 above mentioned links will also display at the bottom of the 'Applications page' for easy access.

The administrator can view an application:
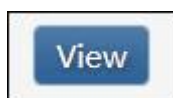
Applications that have not yet been submitted to the CHE can be Edited, Viewed or Deleted:

*Note: When an application is greyed out, you will not be able to select it, this means that it has already been submitted to the CHE, and cannot be taken back.

5) Edit

When clicking on 'Edit' the following screen will appear:

Application summary

Qualification reference **Master of Philosophy in Arts(UFSaa3)**

HEQF Alignment - Section 1

Qualification reference number*
UFSaa3

Qualification title abbreviation*
Mphil (Arts)

HEQC reference number
H/H06/E003CAN

Qualification title*
Master of Philosophy in Arts

SAQA qualification ID
71145

Mode of delivery*
Contact

NQF Exit Level*
Level 9

Minimum duration full*
2

Minimum duration part*
3

Total credits*
180

Minimum admission requirements*
Cognate honours degree with 65% average

Proposed HEQF Category*
Category C - Major changes

Teach-out date*
2042-00-04

Major field of study*
050199 Communication and Media Studies, Other

HEMIS qualification type*
Masters Degree

HEMIS minimum experiential time*
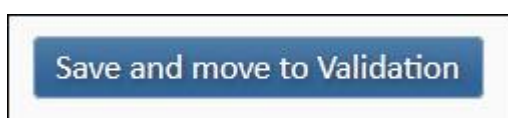10

Total subsidy units*
1

Funding level*
3 Funding level 3 = Masters & equivalent

Save and move to Validation

*Note: The fields marked with a * is compulsory.

When the administrator has made all the required changes, click on the 'Save and move to Validation' button:

Save and move to Validation

The 'Actions' bar on the right of the page will display the following options:

6) **Close and return to list**

   Close the current application and automatically return to the list of applications.

7) **Quick save**

   Save the changes that the user has made up to date, in order not to lose any changes.

8) **Validation**

   Validate whether the supplied details meet submission requirements. This will be displayed when the user clicks on the 'Validation' button:

9) View

When clicking on 'View' it will display the application:

Field	Section 1	Section 2
Proposed HEQF Category	Category C - Major changes	
Qualification reference number	UFSaa3	UFSaa3
HEQC reference number	H/H06/E003CAN	H/H14/E003CAN
Qualification title	Master of Philosophy in Arts	Master of Philosophy in Arts
Qualification title abbr	Mphil (Arts)	Mphil (Arts)
Qualification type		Bachelor Honours degree
Qualification designator		Other - Alternative designator
Other designator		Philosophy
Motivation for other designator		This designator is more appropriate to the field of study
CESM		03 Visual and Performing Arts
Mode of delivery	Contact	Contact

Actions

▶ Close and return to list

The 'Actions' bar will give you the option to 'Close and return to list'

10) Delete

A pop up window with an alert will appear when clicking the 'Delete' button, to confirm whether the user wants to delete this application:
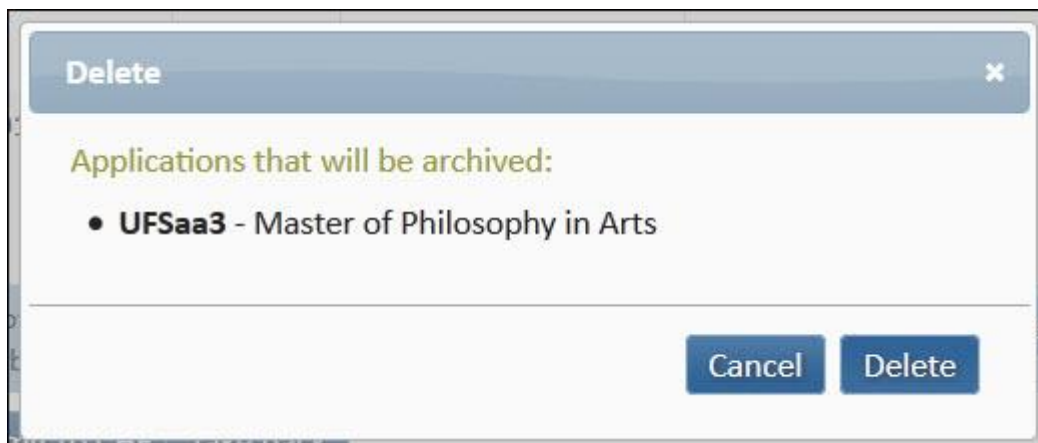
Delete ✕

Applications that will be archived:

- **UFSaa3** - Master of Philosophy in Arts

Cancel   Delete

The administrator can navigate to the next and previous pages by clicking the following buttons:

<< Previous   Next >>

2.6.3 Users

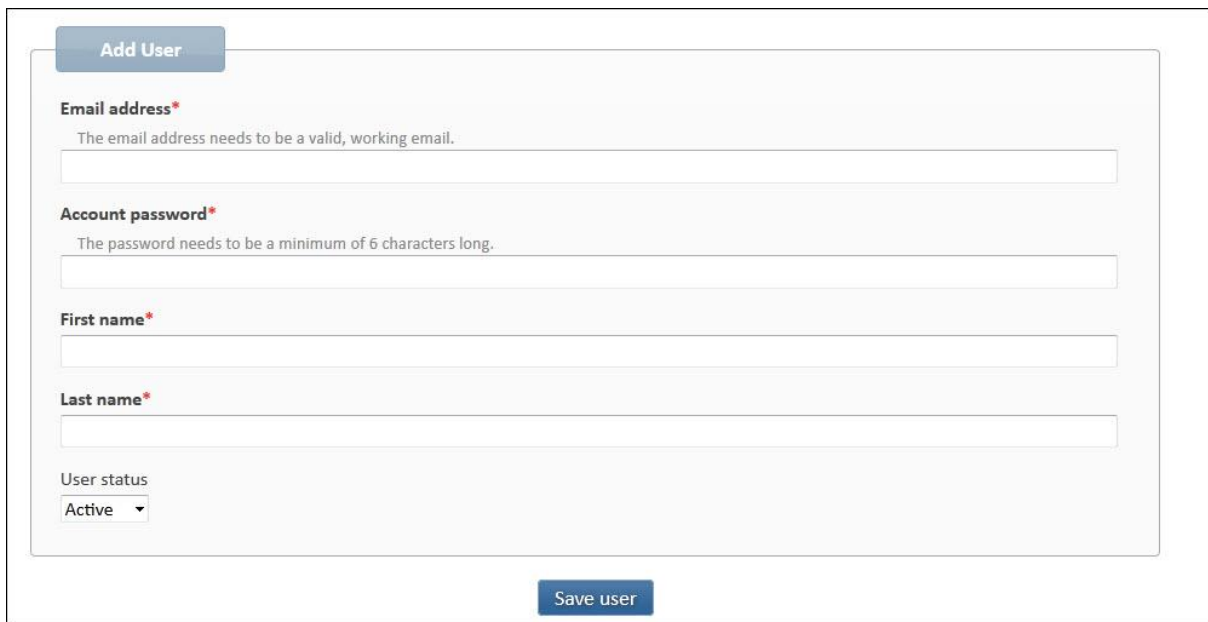The 'User's page will display a list of the administrators for the institution:

Users   Add new user

⇕ Email Address	⇕ First Name	⇕ Last Name	⇕ Role	⇕ Status	⇕ Created	Actions
britzrm@ufs.ac.za	Dolf	Britz	Institutional Administrator	Active	2011-08-24 11:39:53	

<< Previous   Next >>

1) Add new user

The administrator can add a new user by clicking on the 'Add new user' button:

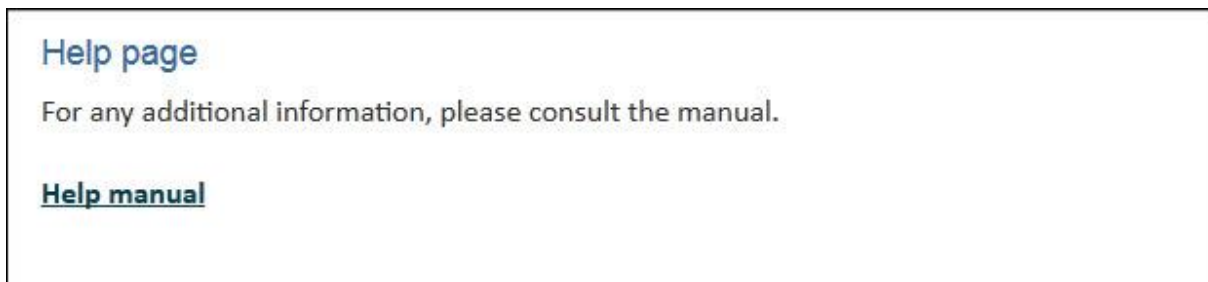The administrator must complete all fields marked with a * and click on 'Save user'

The new user will be created and displayed under your user's list, to return to user's list click on 'Back to list of users'

2.6.4 Help

On the *Help* page, the user manual can be downloaded in PDF format by clicking the 'Help manual' link:

2.6.5 Your account

This page enables the administrator to update their account details. Once the details have been updated, click on the 'Submit' button.

The CHE Administrator can also change their password by clicking on the 'Change your password' button.

➢ Enter your existing password
➢ Choose your new password
➢ Confirm (Repeat) your new password

Click 'Submit'

*Note: All fields marked with * is compulsory.

2.6.6 Logout

The administrator can log out of the system by clicking on the 'Logout' button in the Main Menu bar.

2.6.7 Support

For **business related** queries, please contact the CHE:

Tel: +27 12 349 3934

For **technical related** queries, please contact Octoplus Information Solutions:

Tel: +27 12 346 4823

Email: heqf@octoplus.co.za