HEQF-online User Manual
Institutional User

V1.0

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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 users 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

You are logged in as an Institutional user

The Institutional user may assist with the upload of applications and the correction of any import errors in order to get the application ready for submission to the Council on Higher Education (CHE). When completed, the user must send the applications to the Institution administrator. The following functionality is available from the menu options above:

1. **Home**:   Returns you to this page from anywhere in the system.
2. **Applications**:   Download the template, import and correct applications and send them to your institutional administrator.
3. **Help**:   Access the HEQF-Online user manual.
4. **Logout**:   Logout the system.

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

2.6 Site navigation

To navigate through the site, use the Main Menu:
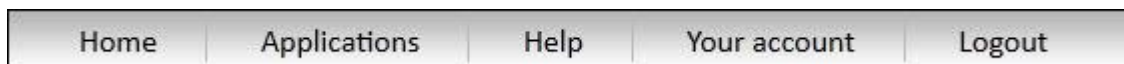
The **Main Menu** bar across the top of the screen has the following menu items:

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. **Help:** Displays a downloadable version of the manual in PDF format.
4. **Your account:** Displays the logged in user's details.
5. **Logout:** This ends the user's session and returns the user to the *login page*.

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

2.6.1 Home

2.6.2 You are logged in as an Institutional user

The Institutional user may assist with the upload of applications and the correction of any import errors in order to get the application ready for submission to the Council on Higher Education (CHE). When completed, the user must send the applications to the Institution administrator. The following functionality is available from the menu options above:

1. **Home**: Returns you to this page from anywhere in the system
2. **Applications**: Download the template, import and correct applications and send them to your institutional administrator
3. **Help**: Access the HEQF-Online user manual
4. **Logout**: Logout the system

The process of data capture and submission of HEQF 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.
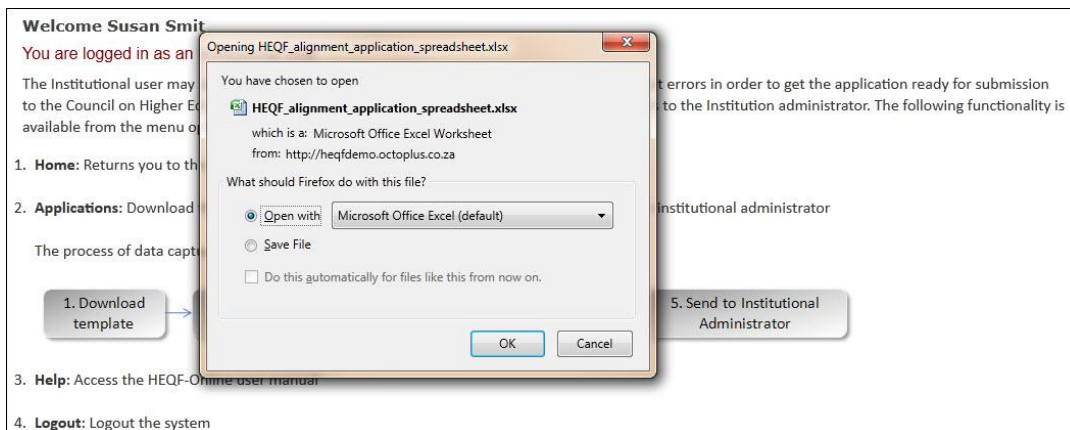
*Note: When logged in as a private institution user the private form will download, and when logged in as a public institution user the public form will download.

a) 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'

Actions

> 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.

Extract HEQC and SAQA data

Extract data for all HEQC applications for my institution

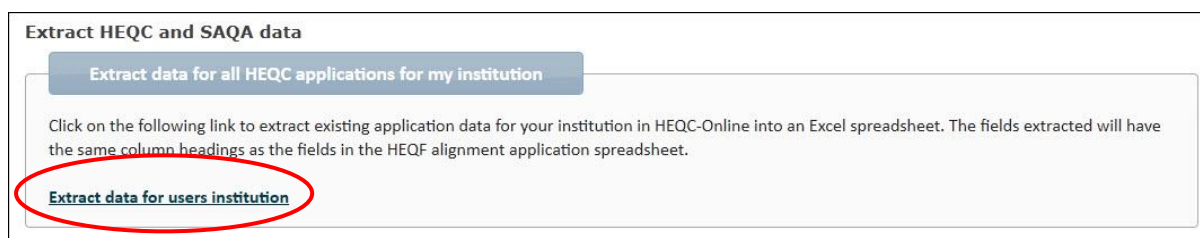Click on the following link to extract existing application data for your institution in HEQC-Online into an Excel spreadsheet. The fields extracted will have the same column headings as the fields in the HEQF alignment application spreadsheet.

Extract data for users institution

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

2) 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:
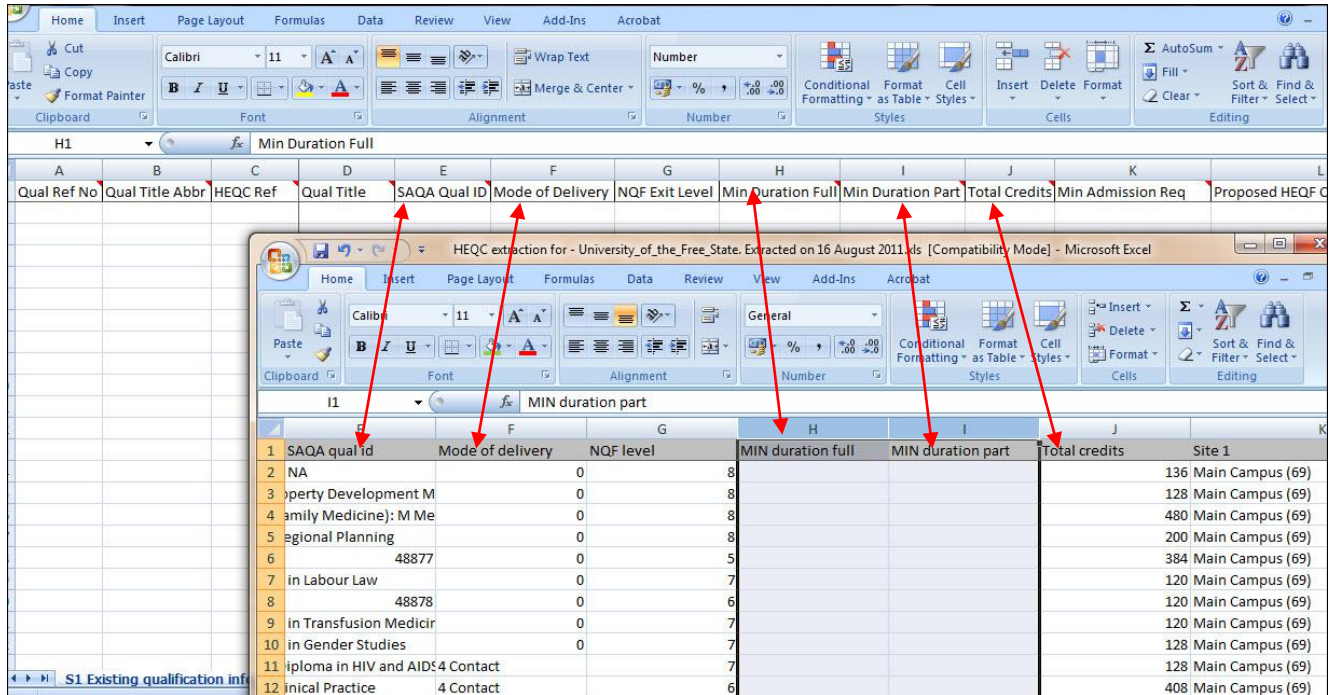
*Note: Be careful NOT to copy the whole sheet into your template, as the columns will NOT correspond, rather copy column, by column.

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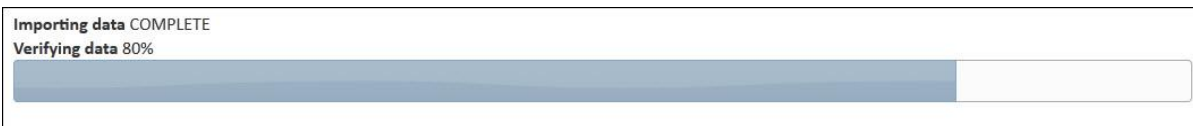
3) Bulk Import

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

a) 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

Detailed report for section 2

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:

Actions

> Return to list

> Re-import

> Accept

> Discard

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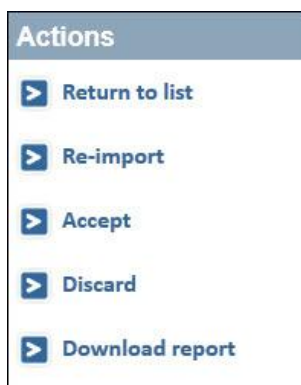
- ➢ Return to list: Return to the list of applications on the 'Applications' page.
- ➢ Re-import: Enables the administrator to re-import the template again.
- ➢ Accept: Administrator can accept all uploads.
- ➢ Discard: Administrator can discard the uploads.
- ➢ Download report: Administrator can download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

b) 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.

c) List of core fields

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

4) 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.

5) Send to Institutional Administrator

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

*Note: This topic will also be described in 2.6.3.1 below.
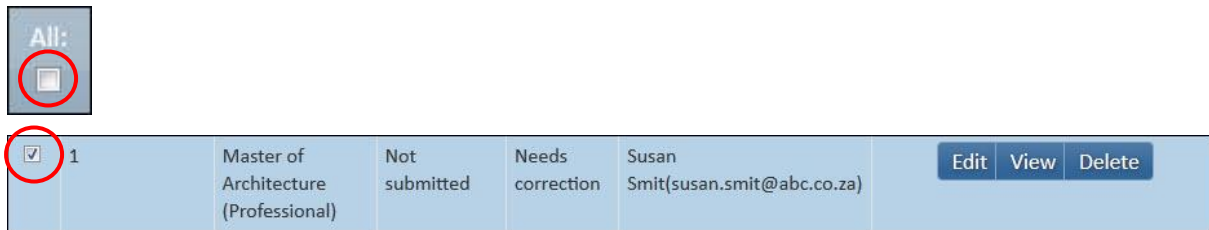
2.6.3 Applications

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

The user 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:
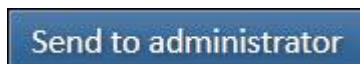

The user can delete selected applications by clicking on the 'Delete' button:

The user can send an application to the institutional administrator for approval by clicking on the 'Send to administrator' button:

The user can search for an application by entering a specific reference number and clicking on the 'Go' button:

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

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

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

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.
➤ Bulk import of applications	Upload applications that the user would like to submit for approval.
➤ Help	Opens the *Help* page where the manual can be downloaded in PDF format.

1) Delete applications

With selected applications the user can delete selected records by clicking on the 'Delete' button:
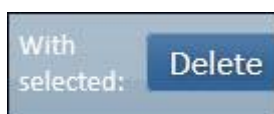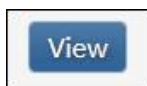

2) Submit applications to the institutional administrator for approval

The user can submit applications to the institutional administrator by clicking on the 'Send to administrator' button:
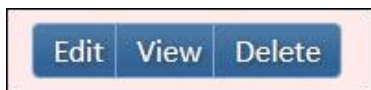

Note: The 4 above mentioned links will also display at the bottom of the 'Applications page' for easy access.

The user can view an application by clicking on the 'View' button:

Applications that have not yet been submitted to the institutional administrator 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 institutional administrator, and cannot be taken back.

3) Edit applications

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

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

When the administrator has made all the required changes, click on the 'Save and move to Section 2' button:

Save and move to Section 2

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

Actions

☐ Close and return to list
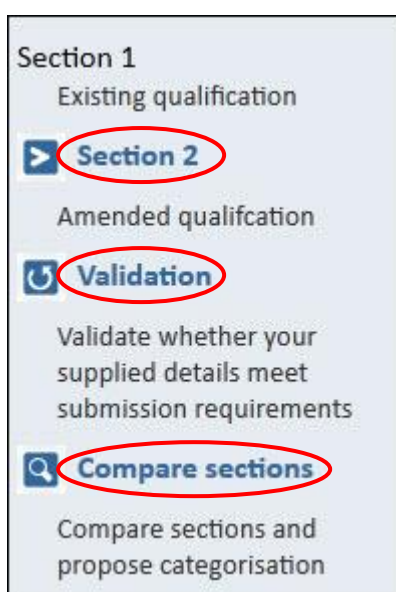
↩ Quick save

a) Close and return to list

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

b) Quick save

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

Below the 'Actions' bar you the following options are available:

Section 1
Existing qualification

▶ Section 2

Amended qualifcation

↻ Validation

Validate whether your supplied details meet submission requirements

🔍 Compare sections

Compare sections and propose categorisation

➢ Section 2	Amend qualification.
➢ Validation	Validate whether your supplied details meet submission requirements.
➢ Compare sections	Compare sections and propose categorism.

a) Section 2

The user can amend Section 2 by clicking on the 'Section 2' button, the following screen wil appear:

The fileds that require correction will have an error message in red:

Note: The fields marked with a * is compulsory.

One all the corrections have been done, the user can click on the 'Save and move to Validation' button:

b) Validation

Once the user has completed section 2, continue to the validation by clicking on 'Save and move to Validation'

Once the user has completed the validation click 'Save and move to Compare sections':

c) Compare sections

The user can compare his applications by clicking on the 'Compare sections' button:

Once the user is done comparing the application, click on the 'Save and return to list' button:

4) View applications

When clicking on the 'View' button the user can view the application:

The details of the application will display:

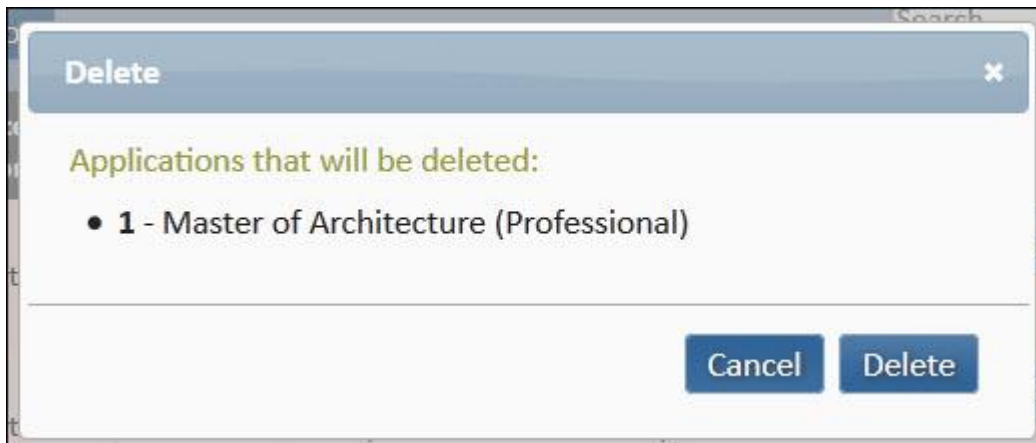The 'Actions' bar on the right will display the following option:

Click on 'Close and return to list' to return to the main list of applications.

5) Delete applications

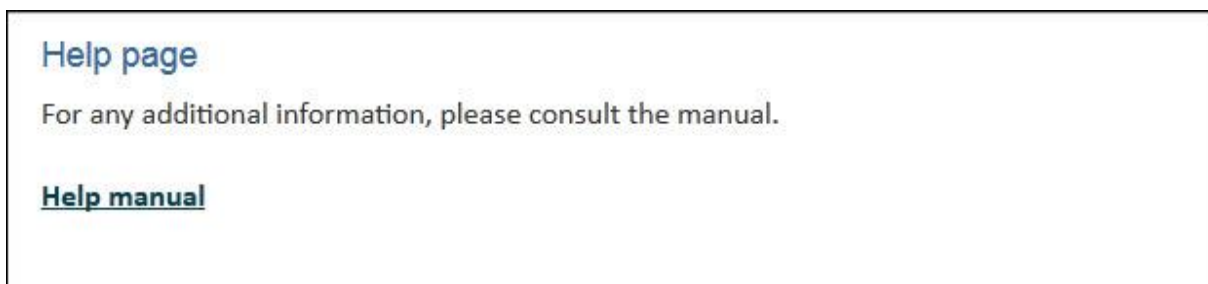The user can click on 'Delete' to delete a certain application:

A pop up window to confirm whether the user wants to delete the record will appear:

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 user to update their account details. Once the details have been updated, click on the 'Submit' button.

The user 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 user 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