HEQC-online

Accreditation

Evaluator Portal User Manual

February 2010

v3.0

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1 INTRODUCTION

The evaluator portal is available to evaluators who have been assigned by the HEQC-Online project administrators to applications or re-accreditation applications.

The aim of the evaluator portal is to provide the evaluator with all the necessary application, re-accreditation and institution information for applications that he is evaluating and provide a facility for him to upload his evaluator report.

An evaluator has online access to the applications that he has agreed to evaluate up until the date specified by the HEQC-Online project administrator (usually a few weeks before an AC meeting occurs).

In this manual, single quotation marks are used to indicate a link or a button to be clicked, in the HEQC-Online System. For example, 'HOME' is a link to the *Home* page.

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

2   SYSTEM ACCESS

2.1   Login

The HEQC-Online System is web browser based.

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

The HEQC-Online landing page will display as follows:

Welcome to the Higher Education Quality Committee Accreditation System

Users of the HEQC-online System may choose a preferred URL to access the HEQC-online system. Both URLs provide access to the same system. The **Internet Access Status** (below) will indicate which URL(s) are currently available.

Please bookmark this page, and not the subsequent pages, as this page (http://heqc-online.che.ac.za) acts as a redirect to the online system.

If your preferred link is down, you will not be able to select it, and should use an alternative URL (link).

URLs to the HEQC-online system

	Internet Access Status
HEQC-online system: Main URL (preferred)	Up
HEQC-online system: Alternative URL (TENET) *	Up

* Please note that institutions that are on the Tertiary Educational Network (TENET) may experience faster results in utilising the system via the Alternative URL. Institutions with domains (websites/emails) ending in **.ac.za** are part of the TENET network.

HEQC-Online Landing Page

From the landing page, users must select one of the two available URL's. The *Home* page of the HEQC-Online System will display as follows:

Login

Username (email address):

Password:

Login

New user? Forgot your password? Click here.

⊞ Who can apply?

If you are an institutional administrator and wish to apply for a login name click here

Please note that this system requires Internet Explorer 6 or higher in order to achieve full functionality

Please click here in order to check your browser settings against the recommended settings.
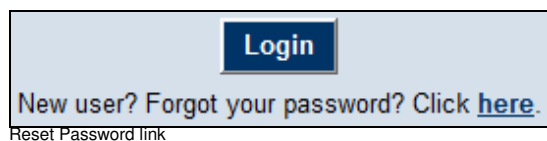
Login Box

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

2.2   Forgotten Password

If you have forgotten your password, the system can reset it for you.

To reset your password, click on the link below the 'Login' button:

Reset Password link

The *Reset Password* page will display as follows:
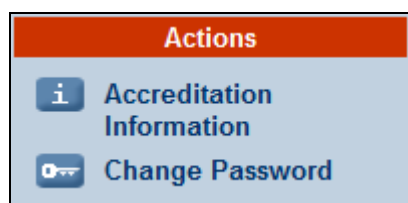

Reset Password Page

Enter your email address and click on 'Reset password.' The system will generate a random password and it will be emailed to you.
Logon using the password that has been emailed to you.

It is recommended that you change your password to something easy to remember.

2.3   Changing your password

You can change your password at any time, by clicking on the 'Change Password' link, found on the Actions bar on the right of your screen.

Example of the Actions bar

The *Change Password* page will display.

Change Password page

Enter your new password, confirm it, and then click 'Change Password'. Your new password will take effect immediately.

2.4   Once logged in

Once logged in, you will see the following screen, which is your *Home page*:

Example of the Home Page

The *Home Page* will display a list of all processes that are assigned to the specific user. The name of the process, the process Reference, and the date the process was last updated are all displayed. The most recent processes will appear at the top of the list.

2.5   Site Navigation

Site navigation is done using a Main Menu and an Action Menu.

Example of the Main Menu

The Main Menu bar across the top of your screen with the following menu items:

- **Home:** When you click on 'Home' from anywhere in the system you will be taken back to the *Home page* that displays just after you have logged in.
- **Tools:** When you click on 'Tools', a list of available functions will be displayed.
- **Help:** Clicking on 'Help' will display context sensitive help, as well as an option to test the compatibility of your browser with the HEQC-Online System.
- **Logout:** This ends the user's session and returns the user to the login page.

Example of the Action Menu

The contents of the Action Menu change according to the function being performed.

Generally the Action Menu will allow you to proceed to the next step/process, return to the previous step, and save existing information before continuing.

3   NOTIFICATION OF APPOINTMENT AS AN EVALUATOR

When an evaluator has been appointed to evaluate an application, they will receive an email informing them of the appointment.

The email will also contain information about how to access the HEQC-Online System.

Email Templates:

```
Dear Colleague

The Directorate of Accreditation and Coordination is a directorate within
the Higher Education Quality Committee (HEQC) of the Council on Higher
Education (CHE) and is responsible for evaluating and accrediting
programmes from all higher education institutions throughout South Africa.

We have recently received the following application for the accreditation:

Programme Name: MTest
HEQC Reference Number: H/PR469/E002CAN
Qualification Name: Psychology
NQF Level: Level 7
Institution:    Test

As the HEQC process is based on a peer review system using academics from
related fields of specialisation I would like to enquire whether you, or a
fellow staff member, would be willing to evaluate these submissions made in
accordance with the HEQC's criteria for accreditation.

The HEQC pays an honorarium for the service to be rendered. Your positive
response will be appreciated.

The process is as follows:
The HEQC will make all relevant documentation available to you for
evaluation via the HEQC Online, as well as sending you a contract and
templates to assist with the evaluation.

This evaluation will be presented to the Accreditation Committee at the
next AC meeting. We would thus require the report to be completed by and
returned to us by a specific date, which will be specified in a later
email. Should you wish to participate in this evaluation, please complete
the details below and return to me via e-mail, as well as signing the
attached contract and confidentiality form and fax it to:

PROJECT ADMINISTRATOR
Accreditation and Coordination Directorate, HEQC
Council on Higher Education
Fax: 012 392 9130

Your details (to be filled out and returned)
Name:
E-mail address:
Physical Address:
Cell:
Landline:

Once we have received your signed contract and confidentiality form, you
will be informed that you have been granted access to the HEQC Evaluator's
portal, where you will find all the necessary documents for evaluation of
the programme.
```

Example of the email sent to an evaluator

An evaluator contract and code of ethics are attached to this email.

4   EVALUATION OF APPLICATIONS AND RE-ACCREDITATIONS

NOTE: The process for evaluating initial applications for accreditation, as well for applications for re-accreditation, is identical. The instructions provided in the manual apply to both types of application.

Applications for Evaluation will only be displayed until the Access date specified by the HEQC. Applications that have passed this date will no longer display on the Evaluators portal.

To start an evaluation process click on 'Tools' on the Main menu, followed by the relevant application type.

For example, to evaluate a new application, click on 'Application Evaluations'.

To evaluate an application for re-accreditation, click on 'Re-accreditation Evaluations'.

To access new applications, click on 'Tools' on the Main menu, followed by 'Application Evaluations'.

A list of applications assigned to the specific evaluator will display. The list will provide information regarding the application, other evaluators assigned to the application, and the date until which the evaluator will have access to the application via the HEQC-Online system.

Displays applications ready for evaluation. Under each application, you will see the following:

- The date this application was assigned to you (as evaluator)
- The last day you will be able to view this application
- Application submission (if clicked, you can see all the documentation attached by the institution to the application)
- Institution's profile
- All evaluators assigned to evaluate this programme (click on a name for their contact details)
- All evaluator reports that have been uploaded so far
- Final evaluator report (you will only be able to upload this report if you are the chairperson)

Note that you will only be able to view these applications until the 'Access ends on' date, as set by the HEQC

Date assigned	Access ends on	HEQC reference number	Programme name	Institution	Assigned evaluators	Evaluation report	Final evaluation report
2010-03-16	2010-03-31	H/PR469/E003CAN	BTest (Hon)	Test	- Ms Demo Evaluator (Chair)	Upload/view reports 0/1 reports uploaded	Upload/view final report

Example of the list of applications assigned to a specific user.

From here, an evaluator may perform the following functions:

View and print the application and any attached documents.

To view and print a complete application, click on the HEQC Reference number for the application. The full application will be displayed, as well as a 'Print' button. Click on 'Print' to print the application.

CHE Reference No.:	H/PR469/E003CAN
Institution name:	Test
Provider type:	Private
Programme name:	BTest (Hon)
Mode of delivery:	Contact
Site(s) of delivery:	1. Main Campus - Test
Date of submission:	2010-02-24

Print

Example of the first part of an application form, with the 'Print' button in the bottom-right corner

Uploaded documents can be viewed and printed by clicking on the title of the document, as listed in the application form.

View and print the Institutional Profile.

To view and print the Institutional Profile, click on the name of the Institution, click on the name of the institution.

The full Institutional Profile will be displayed, as well as a 'Print' button. Click on 'Print' to print the profile

Print

INSTITUTION INFORMATION:

Enter your institutional information or update it if it is already filled in

Institutional Name:	Test
Institutional Type:	Private Institution
Existing or New?	**Existing institution**: A higher education institution whose programmes has been accredited by the HEQC and is registered by the Department of Education as a private higher education institution.
Mode of Delivery:	Contact
Mission and how it is reflected by your existing programmes:	Test
Brief overview of the institution:	Test
Main goals of the institution:	Test

Example of the first part of an Institutional Profile, with the 'Print' button in the top-right corner

Uploaded documents can be viewed and printed by clicking on the title of the document, as listed in the application form.

Access the contact details of other evaluators assigned to this application.

To access the contact details of other evaluators assigned to the application, click on the name of the evaluator. The contact information will be displayed.

Evaluator Contact Details

Name:	Ms Demo Evaluator
Work number:	011 403 2437
Email:	genevievea@rosebankcollege
Position:	Head of Brand, Rosebank College

Example of Evaluator's contact details

Upload their evaluation report and view other evaluation reports for this application.

To upload or view evaluation reports for the application, click on the [ ] button.

The following screen will display:

Please upload the evaluator report:

| File:	N/A
Date Created:	N/A
Last Updated:	N/A
Upload File:	Click here to select the file that you need to upload

Please note that once you click "Confirm upload", the evaluator report will be flagged as ready to be viewed by the HEQC.

The following evaluator reports have been uploaded (click on the document name to view the report).

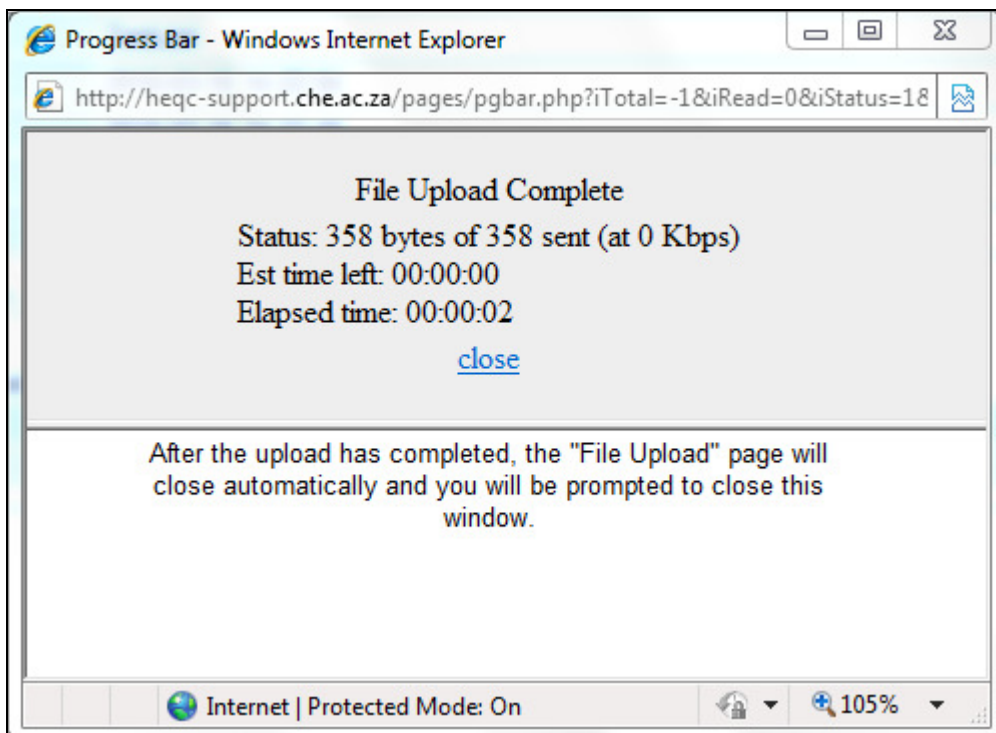| Evaluator	Report
Ms Demo Evaluator (Chair)	No report has been uploaded yet

Example of the *Evaluation Report* upload page, with no reports uploaded.

To upload a report, click on the link 'Click here to select the file that you need to upload'.
The *File Upload* dialogue box will display.
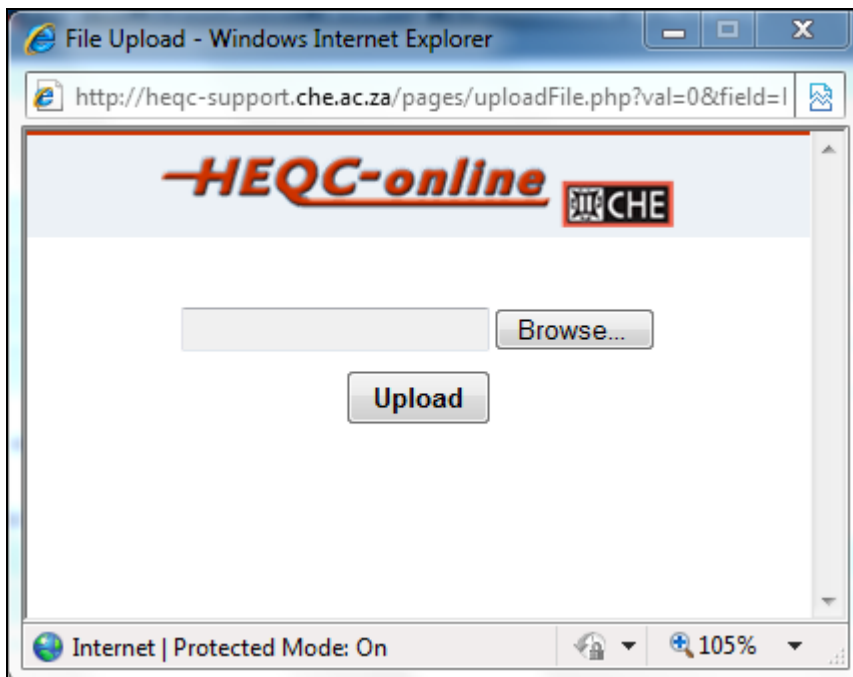
The *File Upload* dialogue box

Click on 'Browse' to find the file on your computer. Once you have located the file, click on 'Upload' to upload the file. Once the upload has been successfully completed, a confirmation message will be displayed, and you must click on 'Close' to close the *File Upload* dialogue box.

The confirmation of successful file upload message

The *Evaluation Report* page will display, indicating that the file has been uploaded.

Please upload the evaluator report:	
File:	Test.txt
First Uploaded:	2010-03-16 14:17:44
Last Uploaded:	2010-03-16 14:17:44
Replace Uploaded File:	Click here to replace the uploaded file with another file.
Delete File:	Click here to delete the uploaded file.

Please note that once you click "Confirm upload", the evaluator report will be flagged as ready to be viewed by the HEQC.

The following evaluator reports have been uploaded (click on the document name to view the report).

Evaluator	Report
Ms Demo Evaluator (Chair)	Test.txt

Example of the *Evaluation Report* upload page, showing an uploaded report.

To replace the uploaded file with a different one, click on 'Click here to replace the uploaded file with another file'. Follow the process for uploading a file, as described above. This will remove any previously uploaded file, and replace it with a new one.

To delete a file, but not replace it with a different one, click on 'Click here to delete the uploaded file', which will remove the file completely.

To view and print an uploaded file, click on the title of the file. The file will open in the relevant programme (e.g. MS Word, Adobe Reader etc.)

Upload the final evaluation report if you are the chairman.

If a chairman has been assigned to the evaluation, he/she will be required to upload a final evaluation report. The procedure for a chairman to upload a file is the same as for other evaluators, with the only difference being that other users cannot view it. The file is uploaded, replaced and deleted in the manner described above.

4 LIST OF INSTITUTIONS FOR EVALUATION

This function provides a list of institutions which have been flagged by the HEQC for evaluation.
No programmes have necessarily been submitted, but the institution itself is required to be evaluated.

The HEQC will flag institutions for evaluation, but these are not assigned to specific evaluators, and will be available to all evaluators on the HEQC-Online System, until such time as the HEQC un-flags the institution.

In order to access the list of institutions for evaluation, click on 'Tools' on the Main menu, followed by 'List Institutions for Evaluation'.

This will display the complete list of registered institutions.

Example of the list of Institutions

The list can be filtered by institution name or institution reference number. Enter either the Reference number or name into the text box, and click 'Search'.

To view and print the Institutional Profile, click on the name of the Institution, click on the name of the institution.

The full Institutional Profile will be displayed, as well as a 'Print' button. Click on 'Print' to print the profile

Example of the first part of an Institutional Profile, with the 'Print' button in the top-right corner

Uploaded documents can be viewed and printed by clicking on the title of the document, as listed in the application form.

5   HEQC-ONLINE SYSTEM SUPPORT

If you experience any technical problems while using the system, please contact Octoplus Information Solutions on:

Tel: 012 346 4823
Email: heqc@octoplus.co.za