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Database management
User settings
Changing provider

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1 Purpose of this document

This document is Part 3 of a 3 part user guide on the Higher Education Client Assistance Tool (HEPCAT). This part explains how to:

- log on
- change user settings
- manage your database.

Part 1 provides details on installing and starting HEPCAT.
Part 2 provides details on primary functions such as creating, importing, editing, validating, submitting and exporting submissions.

2 Logging on to HEPCAT

2.1 Password resets

HEPCAT allows three attempts at a password. After the third incorrect attempt, HEPCAT will suspend the user name. If you forget your username or password or your account has been suspended, please contact the help desk at HEIMS.datacollections@education.gov.au.

2.2 Additional logins

If you require access for additional staff to access HEPCAT, please contact the help desk at: HEIMS.datacollections@education.gov.au.

2.3 Multiple sessions

It is not advisable to run more than one session of HEPCAT at a time on the one PC. If you need to enter data for more than one organisation or enter data for both VET and Higher Education, please close one session and open another. The best way to do this is by using the Change HEP Code option. (See 2.7: Change provider account / Change HEP Code).

2.4 Multiple users

It is not advisable for more than one person to create submissions of the same type at the same time. HEPCAT is a stand-alone application and until it comes time to submitting data to the department, HEPCAT cannot prevent two people from entering the same data on separate PCs. If one person submits their data, it is likely to cause the other person’s data to be invalid.

On the other hand, it is appropriate for one person to create VET submissions, while another creates Higher Education submissions; for one person to create Staff submissions, while another creates Student submissions; or for one to create submissions for one provider (HEP Code) while another prepares a different provider.

2.5 Dual providers

When you log on to HEPCAT, if your organisation is both a Higher Education provider and also an approved VET provider (a dual provider), HEPCAT will prompt you to select a provider type for your current session.
HEPCAT will allow only the submission types related to the provider type you select for that session. If you want to change from one provider type to another, you must log out, then log back in, either by closing and restarting HEPCAT or by using the Change HEP Code function (See 2.7: Change provider account / Change HEP Code).

If you are logged in as a VET provider and there are new Approved VET Courses or changes to these, HEPCAT will display the following information message:

![HEPCAT VET Course update is available](image)

VET Course submissions are validated against these ‘Approved VET Courses’. You will not be able to submit a VET course submission unless the Course Code and Course Type match one of your Approved VET Courses. (See also 12: Approved VET Courses in Part 2 of this User Guide).

2.6 Logging in to test

HEPCAT provides a ‘test’ mode in which you will gain full functionality of HEPCAT - with the exception of the ‘Submit to Department’ function.

To start a session in ‘test’ mode, at the login dialogue, leave the User Name and Password fields blank and click Logon to Test.

![Enter Username & Password](image)

When you click Logon to Test, HEPCAT will prompt you to select a provider type for your current session (VET or Higher Education) - as described for a ‘dual provider’ above.

Submission data that you create in test mode will be recorded against the Higher Education Provider Code (HEP Code) ‘9998’.

2.7 Change provider account / Change HEP Code

Instead of closing, then restarting HEPCAT, the ‘ChangeHepCode’ option allows you to change:

1. from ‘test’ mode to your provider account (or vice versa);
2. from one provider account to another provider account (if you manage more than one provider and have a user name for each);
3. from a VET provider session to a Higher Education provider session (or vice versa) (if you both an approved VET provider and a Higher Education provider - a dual provider).

1. Select Tools → Change HEP Code from the main menu.
2. HEPCAT will prompt you to enter your User name and Password.

3. Enter you User Name and Password, then click OK. Alternatively, click Logon to Test.

4. HEPCAT will close the current session and start a new session for the organisation based on the user name you entered.

5. If you are a dual provider (VET and HE), HEPCAT will prompt for you to select a VET or a Higher Education session.
3 User Settings

Use the User Settings option to change the default directories for importing and exporting HEPCAT data; to set the validation threshold; and to shrink the database whenever you close HEPCAT.

If you change a default directory, HEPCAT will always suggest the new default location whenever you import or export files.

If you set a validation threshold, whenever you validate your files in HEPCAT and the number of validation errors reaches this threshold, validation will stop and HEPCAT will display a message to advise you that the threshold has been reached.

If you tick and save the ‘Autoshrink on close’ option, HEPCAT will optimise your database every time you close HEPCAT.

(For details on Proxy Settings, see Section 8: Proxy Settings in Part 1 of this guide).

1. Select Tools -> User Settings from the main menu.

2. HEPCAT will display the ‘Default Setting’ dialogue.
3. To change the default import or export directory, click a ‘…’ button, the browse for the directory you want to use.
   Note: There is a 100 character limit for the File path name.

4. To set a validation threshold, type a number greater than 99.

5. For HEPCAT to shrink your database every time you close HEPCAT, tick the Autoshrink on close tick-box.

6. Click OK.

4 Delete database (no longer available)
In October 2009 (HEPCAT Release 6), the Delete Database function was removed from HEPCAT.

5 Shrink Database
To optimise the size of your database, use the ‘Shrink Database’ option.
Note: You can also set HEPCAT to automatically shrink your database every time you close HEPCAT – see 3: User Settings.

1. Click Tools -> Shrink Database from the main menu.

2. HEPCAT will display a message confirming the database has been optimised.
6  Show Database Size
To find out how much space your HEPCAT data is taking up, you can use the ‘Show Database Size’ option.
1. Click **Tools -> Show Database Size** from the main menu.

2. HEPCAT will display a message showing you the size of your database.

7  Backup Database
You should regularly back up your HEPCAT database to protect against loss of data in case of system failure. Use the ‘Backup database’ option.
1. Select **Tools-> Backup Database** from the main menu.
2. Click **Browse** (default location of C:\hepcat\Backup will display) and select a location to save the backup.  
**Note:** You must backup on your local drive (usually C:\). A HEPCAT database cannot be saved directly on a shared or network drive.

3. Type a name for your file – such as 13Dec07 – then click **Save**.

4. Click **Backup** to create the database backup.
5. HEPCAT will create a backup copy of your database in the selected location and display a message when this is completed.

**Note:** It is strongly recommended that you create a copy of the backup file to store on a secure, external location in conjunction with your institution's data maintenance policies.
8 Restore Database
To restore a database to a previous database backup, use the ‘Restore Database’ option.

Note: This procedure will replace your current HEPCAT database.

1. Select Tools → Restore Database from the main menu.

2. Click Browse and navigate to the location where you stored your backup copy.

   Note: The backup copy must be located on a local drive (usually C: \) and not a shared or network drive.

3. Select the backup file and click Open.
4. HEPCAT will return to the ‘Restore Database’ dialogue.
5. Click **Restore**.

6. HEPCAT will ask you to confirm. Click **Yes** to confirm.

7. HEPCAT will close and restart.

9 **Archive Database**

You should archive your HEPCAT database if it becomes too large (4gb limit) or your Submission Status list becomes unmanageable. Use the ‘Archive’ option.

1. Select **Tools-> Archive** from the main menu
2. Select the year which you want to archive, and then click Next.  
   **Note:** You can only archive one year at a time.

3. Click Browse and navigate to the location where you want to save the backup copy of the HEPCAT database.  
   **Note:** The backup copy must be located on a local drive (usually C:;) and not a shared or network drive.
4. Click **Browse** and navigate to the location where you want to save the archived database.

   **Note:** The archived database must be located on a local drive (usually C:\) and not a shared or network drive.

5. HEPCAT will display the options selected in the Archive Wizard
6. Click **Next** to start archive process. The above dialog box will show the progression of the archive process and display the results when finished.
10 Open Archive Database

To open an archived database in HEPCAT, use the ‘Open Archive’ option.

**Note:** This procedure will **ONLY** allow you to view your archived database for a HEPCAT session is the file structure has not been updated.

1. Select **File -> Open Archive** from the main menu.

2. Select the archived database and click **Open**.

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3. HEPCAT will return to the main screen. A status bar at the bottom of the screen will monitor the progress of opening the database. Once the process has finished a dialog will provide notification and the Archive Submissions section in the submission status tool bar will be populated.

11 Submission History

You can view a record of status updates to a particular submission. This function is provided primarily to assist with problem resolution. The Request Id listed in the Submission History is passed to HEIMS when you submit your submission.

To view the submission history, click the ‘History’ item under the ‘View’ menu.
Here is an example of the Submission History screen, showing a record of the status changes made to a Course of Study submission.