

HEIDI STAKEHOLDER GROUP

TUESDAY 28TH FEBRUARY 2017 11:00 – 2:30PM
HESA, 95 PROMENADE, CHELTENHAM

HSG_17_01_01

HEIDI PLUS UPDATE

This paper provides the Group with the following updates;

1. Heidi Plus application process update
2. Heidi Plus usage statistics and service standards
3. Heidi Plus development update
4. Heidi Plus training update
5. Decommissioning of heidi
6. Heidi usage statistics

1. HEIDI PLUS APPLICATION PROCESS UPDATE

Engagement in the Heidi Plus application process has been continuing to progress well.

	24 October 2016	22 February 2017
HE providers that have completed application process	77% (125)	85% (138)
HE providers engaged in application process	17% (27)	10% (16)
HE providers that have not yet started application process	6% (10)	5% (8)
Non-HE providers that have completed application process	32% (6)	47% (10)
Non-HE providers engaged in application process	52% (10)	38% (8)
Non-HE providers that have not yet started application process	16% (3)	14% (3)

The following HE providers are yet to start their application process. HESA are continuing to offer support with this process;

- Heythrop College
- London Business School
- St Mary's University College
- The University of Wales (central functions)
- University College Birmingham
- University of London (Institutes and activities)
- University of the Highlands and Islands
- Writtle College

For those organisations that have completed the application process, progress with identifying, assessing and setting up users continues.

There have been two new not-for-profit subscribers to Heidi Plus since the last meeting – The University of Law and The Royal Society.

[Provider Level User Table Redacted]

2. HEIDI PLUS USAGE STATISTICS

A full set of Heidi Plus usage statistics are available within Appendix 1 of this paper. In summary, uptake is progressing well. Below are a few highlights;

- Number of views of HESA dashboards in period has risen from 456 in July – September 2016 to 2541 in the period October to December 2016. This was due to the release of Analytics Lab dashboards (accounting for 854 of the 2541 views) and Student and Staff tabular dashboards (accounting for 1207 of the 2541 views – see below for more information)
- The number of HEP users active in the period is continuing to rise (for information, this number stands at 910 users for the first 8 weeks of 2017).
- In the period October to December 2016, 78% of HE provider users logged in at least once.

3. HEIDI PLUS DEVELOPMENT UPDATE

Please find below an update on Heidi Plus data and service development since the last meeting;

Release of Tableau Server 10.1.3

On 26 January 2017 Heidi Plus was upgraded to Tableau Server 10.1.3. This upgrade included two key functionality improvements for users, which had been frequently requested, which are summarised below;

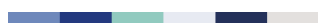
1. New dashboard creation feature:

Silver and Gold users are now able to create their own dashboards in Heidi Plus. This new feature allows users to add two or more visualisations created within the same workbook to a single dashboard, complete with titles and filters. This includes the ability to show visualisations created using different data sources side by side (see 'Work with two or more data sources in the same workbook' below).

2. Work with two or more data sources in the same workbook:

It is now possible to work with more than one data source within a single workbook.

This new feature allows Silver and Gold users to:



- Create single workbooks that include visualisations designed from different data sources.
- Combine visualisations from different data sources within a single dashboard.
- Blend two or more data sources. This will allow users to compare data from different data sources (for example, different HESA Finance data sources) within a single visualisation/table of data. This blending is at aggregate level using a dimension common between the data sources (such as Provider UKPRN).

Release of HESA Student and Staff Tabular dashboards for all users

In November 2016 HESA released a range of 12 dashboards containing rounded data about Students and Staff. These dashboards were developed in response to concerns raised by users that Bronze and Silver users were unable to access data about Students and Staff within Heidi Plus as this data was only available to Gold users. They have been designed to allow simple access to tables of both FPE and FTE data which can be manipulated by the user using a simple set of filter options. The dashboards were designed in conjunction with a team of representatives from the Higher Education sector and use the most commonly accessed dimensions within Heidi Plus.

Feedback regarding these dashboards has been positive, however there is currently a functionality constraint which allows users to download these cross tabulations of data in PDF and image format only, and not in excel format. Several users have raised this as an issue with the usability of the dashboards going forward.

HESA have had initial discussions with our vendors to confirm that this functionality cannot currently be enabled without also giving users access to the underlying data.

HESA would like to trail an approach to putting forward Tableau Server functionality improvements which involves providing a synopsis of the problem, posting it to the Tableau Ideas forum and inviting Heidi Plus users to vote for the idea, and therefore raising its profile for inclusion in future Tableau Server releases.

We would like to seek the groups approval for taking this approach forward.

Release of Analytics Lab dashboards

In December 2016 HESA released the first 4 dashboards developed as part of the Analytics Lab (formally Heidi Lab) project. These dashboards were developed by the UK Higher Education Sector, for the Sector as part of the Jisc and HESA Business Intelligence Initiative.

These dashboards are available to all Heidi Plus users, and are available within the '2. HESA dashboards' project;

- Analytics Lab - Athena swan and Race Equality dashboard
- Analytics Lab - Destination of leavers by activity
- Analytics Lab - Destination of leavers explorer

- Analytics Lab - HESA Higher Education Business and Community Interaction Survey Part B Explorer

Analytics lab and the release of further dashboards will be discussed later in this meeting.

Heidi Plus stability issues

The group will remember that during a number of training events we had experienced stability issues with Heidi Plus whilst attendees have been undertaking exercises. Users were receiving multiple errors whilst using the service within this environment and at times had to restart their exercises.

After discussions with our Vendor, a fix for this was implemented as part of the recent Heidi Plus upgrade. Following further testing (and also a successful training event) it looks promising that this issue is now resolved.

Heidi Plus API update

As discussed at previous Heidi Stakeholder Group meetings, a Heidi Plus API has not yet been developed. HESA currently has no capacity in house to develop a Heidi Plus API and therefore this work will need to be outsourced. As there is no available budget for this work until next financial year, this work will not be able to start until August 2017.

We are also reviewing this requirement in light of the development of a new organisational data warehouse, and are having ongoing discussions internally about how to time this work to make best use of the new structures within the HESA data warehouse.

HESA would welcome member views as to the relative importance of the development of a Heidi Plus API.

Upcoming development and releases

Below is a summary of planned upcoming data, dashboard and system releases;

Month	Data source releases	HESA dashboard releases/updates	Heidi Lab development	System releases
2017				
Mar	<ul style="list-style-type: none"> • 2015/16 HESA Staff • 2014/15 SCONUL Library Management Statistics • 2015/16 HESA Finance and KFI Data • 2015/16 HESA Student Staff Ratios • 2015/16 UK Performance Indicators (tranche 2) 	<ul style="list-style-type: none"> • Update to staff dashboards 	<ul style="list-style-type: none"> • Provide support to Winter 2017 teams • Polishing and quality assurance of Analytics Lab dashboards 	<ul style="list-style-type: none"> • Tableau Server upgrade

Month	Data source releases	HESA dashboard releases/updates	Heidi Lab development	System releases
2017				
Apr	<ul style="list-style-type: none"> 2016 National Student Survey 2015/16 HE-BCI Part B 		<ul style="list-style-type: none"> Provide support to Winter 2017 teams Polishing and quality assurance of Analytics Lab dashboards Annual update to HE-BCI dashboard Dashboard release 	
May	<ul style="list-style-type: none"> 2015/16 Estates Management Record 	<ul style="list-style-type: none"> Update to Estates Management Record dashboards 	<ul style="list-style-type: none"> Polishing and quality assurance of Analytics Lab dashboards Provide support to Spring 2017 teams Dashboard release 	<ul style="list-style-type: none"> Tableau Server upgrade
Jun			<ul style="list-style-type: none"> Polishing and quality assurance of Analytics Lab dashboards Provide support to Spring 2017 teams 	
Jul	<ul style="list-style-type: none"> 2015/16 UK Performance Indicators (tranche 3) 2015/16 HESA Destination of leavers 		<ul style="list-style-type: none"> Polishing and quality assurance of Analytics Lab dashboards Provide support to Spring 2017 teams Annual updates to Destination of leavers dashboards 	<ul style="list-style-type: none"> Tableau Server upgrade
Aug	<ul style="list-style-type: none"> 2015/16 HESA Provider profile 		<ul style="list-style-type: none"> Polishing and quality assurance of Analytics Lab dashboards Dashboard release 	
Sept	<ul style="list-style-type: none"> 2015/16 SCONUL Library Management Statistics 2017 National Student Survey 		<ul style="list-style-type: none"> Polishing and quality assurance of Analytics Lab dashboards 	<ul style="list-style-type: none"> Tableau Server upgrade
Oct			<ul style="list-style-type: none"> Polishing and quality assurance of Analytics Lab dashboards 	
Nov				<ul style="list-style-type: none"> Tableau Server upgrade
Dec				

4. HEIDI PLUS TRAINING UPDATE

Below is an update on Heidi Plus training provided during the period 13th April 2016 – 21st February 2017:

Heidi Plus seminars and webinars

Event Type	Number of Events	Number of Delegates
Seminar	24	480
Bespoke Visit	17	160
Live Webinar	42	277
Total	83	917

Heidi Plus Feedback received

Of the 917 delegates who have attended Heidi Plus training with HESA, 100% of delegates rate the style, pace, content, and delivery methods of the training as good or excellent. In addition, 100% of delegates rate the customer service provided by HESA on the day as good or excellent.

The general feedback provided by attendees following training is consistent with the statistics above: (obtained from BOS Online surveys: Q11: What suggestions do you have for improving or enhancing the training in the future?);

“I thought that the trainers did an excellent job given the breadth of material to be covered in such a short space of time”

“Excellent. Has improved my understanding of HEIDI Plus and will enhance subsequent activity”

“Very enjoyable and informative session. I'm looking forward to trying out the system in anger!”

“This was a bespoke course so there was time for the creation of reports with expert help. This was very valuable”

“A very useful training session”

“The staff running the training were great - very engaging but the day was relaxed and went at a suitable pace for everyone in the room”

What is New?

- Heidi Plus – Data protection Refresher Training for Lead Contacts (Via ‘Easy Generator’ ELearning Tool)
- Heidi Plus Essentials Content
- Heidi Plus Advanced

Future training (February 2017 – September 2017)

- Heidi Plus Advanced
- Heidi Plus Essentials
- Heidi Plus and Marketing
- Heidi Plus and working with Research Data
- Heidi Plus International
- Heidi Plus and working with Equality Data
- Heidi Plus and working with Estates Data
- Heidi Plus – Data protection training for lead contacts (webinar)
- Heidi Plus – Data protection training for Gold users (webinar)
- Heidi Plus – Data protection Refresher Training for Lead Contacts (Via 'Easy Generator' ELearning Tool)

Places are still available for some dates, and can be booked from the HESA website here www.hesa.ac.uk/seminars.

5. DECOMMISSIONING OF HEIDI

The decommissioning of heidi is planned for Thursday 27 April 2017.

In preparation for this, a communication was emailed to all heidi users on 1st February 2017 to remind them of this date, to encourage them to download any reports that they may require in future, and to suggest that they contact their Heidi Plus Lead Contact if they wish to have a Heidi Plus account. In addition, HESA are now providing reduced user support for heidi queries and no further development work will be undertaken on the Heidi system. Heidi and the Heidi API are also considered as at risk services.

Following this email, we experienced a significant increase in user accounts being requested.

A further email will be sent to users in late March to provide a final reminder of the decommissioning date.

6. HEIDI USAGE STATISTICS

A full set of heidi usage statistics are available within Appendix 2 of this paper for information.

There continues to be a significant decline in the use of heidi, with all metrics declining compared to the previous quarters. When comparing October to December 2016 to the same quarter in the previous year, 27% fewer HE provider users were active in the period, creating 45% fewer reports.

In addition, usage of the Heidi API continues to reduce.

As heidi will be decommissioned in April, this will be the last time these statistics will be reported to this group.

APPENDIX 1 – HEIDI PLUS USAGE METRICS

Please find below an update on the Heidi Plus usage metrics for 2016:

No.	Metric	Jan – Mar 2016	Apr – June 2016	July – Sept 2016	Oct – Dec 2016
1	User and organisation activity				
1.1	Number of HEP (higher education provider) Users (all role levels) created in period* **	180	213	237	275
1.2	Number of HEP users active in the period*	217	332	552	743
1.3	Number of HEP organisations active in period	66	94	118	125
1.4	Total number of HEP users at end of quarter**	222	435	672	947
2	Functionality activity				
2.1	Number of new workbooks created in period	518	1082	1281	1417
2.2	Number of new views created in period	1517	2848	2942	3661
2.3	Number of exports in period (discussing with vendor if it is possible to break this down by download format – data/image/crosstab/pdf)	tba	tba	tba	tba
2.4	Number of views of HESA dashboards in period (can be broken down by dashboard – shown as a total for the purposes of this paper))	15	8	456	2641
2.5	Number of views of Support material views in period (can be broken down by dashboard – shown as a total for the purposes of this paper)	52	32	993	1121
3	Data source interaction				
3.1	Number of times a data source has been accessed in period (can be broken down by data source – shown as a total for the purposes of this paper)	18034	19403	22979	26355
4	API activity				
4.1	Number of organisations with an active API key in period*	n/a	n/a	n/a	n/a
4.2	Number of calls to the API in period*	n/a	n/a	n/a	n/a

* Comparable to heidi metrics

** These metrics relate to users that have accepted their role in the period and logged into Heidi Plus at least once since activating their role. Those that have been invited to a role and not accepted it, or have accepted their role but never logged in are not included

HEIDI PLUS SERVICE STANDARDS

Please find below an update on performance against Heidi Plus service standards for 2016:

Service standard	Jan – Mar 2016	Apr – June 2016	July – Sept 2016	Oct – Dec 2016
Heidi Plus system availability				
% of system availability within office hours (target 100%)	100%	100%	100%	100%
% of system availability outside of office hours (target 95%)	100%	100%	99%	100%
Heidi Plus user support				
Number of support enquiries received *	-	710	797	594
% of support enquiries where initial response was made within 1 working day *	-	75%	76%	83%

*A new email monitoring service (Help Scout) was introduced on 1st April 2016.

APPENDIX 2 – HEIDI USAGE METRICS

Statistic	1 Jan - 31 Mar 2008	1 Jan - 31 Mar 2009	1 Jan - 31 Mar 2010	1 Jan - 31 Mar 2011	1 Jan - 31 Mar 2012	1 Jan - 31 Mar 2013	1 Jan - 31 Mar 2014	1 Jan - 31 Mar 2015	1 Jan - 31 Mar 2016	1 Apr - 30 June 2016	1 July - 30 Sept 2016	1 Oct - 31 Dec 2016
Number of HE institution owned (incl. HE institution user owned) reports created and saved in period***	1588	2110	2500	2453	2831	2496	3651	2934	2396	1833	1792	998
Number of report views by HEI users in the period (<i>distinct reports</i>) ***	19665 (3602)	24024 (3522)	26197 (3902)	23000 (3780)	22011 (3571)	23670 (3103)	26644 (3683)	25246 (3199)	21907 (2349)	17344 (2032)	14312 (1858)	9460 (1174)
Number of report downloads by HE users in Excel format in the period ***	3245	4637	5523	5920	8991	9349	12536	12766	11871	8890	8058	4891
Number of report downloads by HE users in XML format in the period ***	36	31	33	25	51	38	54	39	40	53	176	40
Number of HE institution owned (incl. HE institution user owned) patterns charts created in period ***	-	178	146	104	250	272	119	284	30	148	0	0
Number of HE institution owned (incl. HE institution user owned) other charts created in period ***	35	47	61	38	118	33	30	35	13	7	8	3
Number of HE Institution owned charts downloaded to PowerPoint in the period (<i>distinct charts</i>)**	9	137 (89)	127 (60)	73 (46)	****	****	130 (98)	37 (16)	10 (3)	40 (21)	8 (7)	1 (1)
Number of HE institution owned (incl. HE institution user owned) groups created in period	174	232	247	154	213	149	169	134	95	117	82	56
Number of HE Institution Users (administrators and normal users) created in period	274	253	274	188	235	240	261	226	171	114	107	54
Number of HEI users active* in the period	533	645	760	830	1048	1109	1247	1215	1256	1141	971	845
Number of Public users active* in the period	125	67	92	126	112	89	39	51	45	41	29	27
Number of organisations with an active API key in period	n/a	n/a	n/a	n/a	n/a	n/a	n/a	20	12	11	9	8
Number of calls to the API in period *****	n/a	n/a	n/a	n/a	n/a	n/a	n/a	3356	760	558	351	133