

HEIDI STAKEHOLDER GROUP

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

HSG_17_01_03

HEIDI PLUS ADDITIONAL SERVICES

Summary

At the April 2016 meeting of the Heidi Stakeholder Group a paper was presented on potential new additional services that HESA could offer to create greater value for users. The Group requested some follow-up actions on these additional services and the current status of each is presented below.

Identified requirements and service proposals

Additional service 1: Creation of bespoke dashboards, visualisations and analyses for individual HE Providers.

We took an action to explore demand for such a service. Since the discussion in April 2016 two things have happened. Firstly, Tableau Version 10 has delivered dashboard authoring functionality via the web interface, so Higher Education Provider (HEP) users are now able to create dashboards for themselves. Secondly, in terms of how a more comprehensive design service might be offered, our view has evolved and we now see this being part of the portfolio of services offered by Analytics Lab (which is being covered under Agenda Item 8). Some market research to explore demand for this service is already underway, and an update on this will be provided at the meeting.

Additional service 2: Mechanisms for HEPs to share dashboards with other HEPs.

HESA took an action from the April meeting to investigate the mechanisms that might be used to facilitate such sharing. The existing Heidi Plus infrastructure is capable of supporting the sharing of dashboards across HEPs but not without intervention from HESA. There are two options here depending on the extent of sharing required. The first is for HESA to undertake a process whereby an HEP dashboard is transferred by HESA into the HESA Dashboards project. As such it would become available to all user organisations within Heidi Plus. The second is more suited where material needs to be shared with a restricted subset of user organisations. This might arise for example where a group of HEPs are undertaking a joint benchmarking exercise or are working on some other collaborative piece of work in which dashboards and visualisations may be useful. In this scenario HESA would need to establish a new Tableau project for the subset of HEPs involved, manually provide access to that project to the HEPs, finally placing any required dashboards within the new project. All of the above is currently possible and requires no development work. However, it is likely to be utilised by a limited subset of HEPs and therefore it would seem appropriate to fund any such work through direct charging for staff time. It is recommended that we consider how best we might publicise this service, perhaps through a service catalogue.

Additional service 3: New dashboards of user metrics for lead contacts

We have generated standardised sets of metrics that are currently available to lead contacts on request and delivered in Excel spreadsheets. Establishment of dashboards within Heidi Plus will be preferable in the longer term and HESA will add this requirement to the development 'product backlog' for implementation when resourcing permits.

Additional service 4: Creation of metrics, KPIs and benchmarking groups for specific HEPs

The functionality offered within Tableau Server is limited in terms of the ability of HEPs to extend the data resources to which they have access. As with the additional service on sharing of dashboards, this activity would need to be undertaken by HESA on behalf of HEPs. The mechanisms are already in place, since HESA has a high level of control over the data resources available to each user organisation. Once again, this service would seem most appropriately funded through direct charges to those wishing to utilise it. We recommend that this service is also publicised as part of a service catalogue.

Additional service 5: Facility for HEPs to upload their own data to Heidi Plus

As an additional service this could have very significant value for HEPs but it does also present some significant challenges. Data ownership issues and responsibilities under the Data Protection Act would need thorough exploration before we could offer such a service. To-date there has been insufficient staff resource available to undertake this assessment and we have not experienced any pressing demand from user organisations. We recommend that this proposal remains on our list of potential services, and is subject to a more thorough assessment as soon as resources permit.