

Heidi Plus update

This paper provides the Group with the following updates;

- Heidi Service launch
- Application process and take-up
- Details of upcoming development
- Feedback from users and current issues

We would be pleased to receive the Groups feedback on the areas highlighted in bold in the paper below.

Heidi Service launch

On 30 November 2015, HESA successfully launched Heidi Plus, the successor to heidi. The launch followed over a year of system and data development as part of the HESA and Jisc Business Intelligence Project.

All 183 organisations subscribed to heidi were offered the opportunity to start the application process for Heidi Plus during early November 2015, and were informed of the upcoming decommissioning of heidi, planned for November 2016. Access to Heidi Plus has been offered as part of an organisations subscription to heidi for the remainder of the 2015/16 subscription year at no additional cost.

To accompany the launch, HESA Training provided a series of half day hands on workshops for new Lead Contacts during November and December, to provide an overview of the service, data protection training and Lead Contact responsibilities. A further update on training is provided later in the meeting.

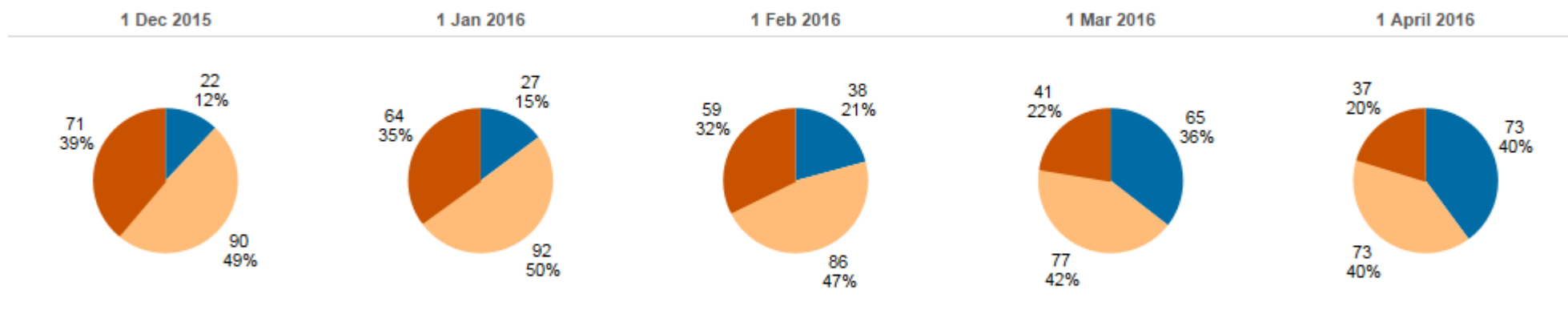
Application process and take-up

Engagement in the Heidi Plus application process has been progressing well since launch. As the application process has multiple steps it has proved to be a slow process for many organisations.

As of 1 April 2016, 40% (73) of all heidi subscribers had completed their Heidi Plus application process, a further 40% (73) were in the process of completing their application process, and 20% (37) were still to start the process.

When looking just at HE Providers, as of 1 April 2016, 43% (70) had completed their Heidi Plus application process, a further 39% (63) were in the process of completing their application process, and 18% (29) are still to start the process.

Heidi Plus application process by month



Statistic

- Organisations completed application process
- Organisations engaged in application process
- Organisations not started application process

The Heidi Services Team will be making contact with the remaining 37 organisations that are yet to start their application process during May 2016 to encourage them to start this process.

For those organisations that have completed the application process, progress with identifying, assessing and setting up users appears to be going well, with the table below showing a summary of active organisations by user type;

Organisation	Heidi Plus Lead Contact	Heidi Plus Gold User*	Heidi Plus Silver User	Heidi Plus Bronze User	Grand Total
Aberystwyth University	2				2
Anglia Ruskin University	1	1	1		3
Bangor University	2	2	1		5
Birmingham City University	2	3	10		15
Bishop Grosseteste University	2	7	2		11
Buckinghamshire New University	1	3			4
Cardiff Metropolitan University	2		23		25
Cardiff University	2	8			10
De Montfort University	2		1	1	4
Glasgow Caledonian University	2	4			6
Heriot-Watt University	1	1			2
Higher Education Funding Council for England	1				1
King's College London	1	10	1		12
Kingston University	2		3		5
Leeds Trinity University	2				2
Liverpool Hope University	2	1	1		4
Liverpool John Moores University	1				1
Liverpool School of Tropical Medicine	1				1
London School of Economics and Political Science	2	3			5
Loughborough University	2	1	3		6
Middlesex University	2		2		4
Oxford Brookes University	2	2			4
Queen Mary University of London	2	5			7
Royal College of Music	1		1		2
Royal Holloway and Bedford New College	2	2	7		11
Sheffield Hallam University	1	2			3
Southampton Solent University	2				2
St George's Hospital Medical School	1				1
The Arts University Bournemouth	1	1	1		3
The Chartered Association of Business Schools	1				1
The City University	2	3	1		6
The Manchester Metropolitan University	2	19	4		25
The Open University	2	7	14	5	28
The Queen's University of Belfast	2		3		5
The Robert Gordon University	2	4	4		10
The Royal Central School of Speech and Drama	2				2
The Royal Veterinary College	1	1			2
The University of Bath	2	1			3
The University of Bradford	1	3			4

Organisation	Heidi Plus Lead Contact	Heidi Plus Gold User*	Heidi Plus Silver User	Heidi Plus Bronze User	Grand Total
The University of Brighton	2				2
The University of Bristol	3	4			7
The University of Chichester	2				2
The University of East Anglia	2	2			4
The University of East London	1	5	5	1	12
The University of Essex	2	2	8		12
The University of Exeter	2	17			19
The University of Greenwich	2	5			7
The University of Hull	2	3			5
The University of Lancaster	2		1		3
The University of Leicester	1	7			8
The University of Lincoln	2	9			11
The University of Liverpool	1				1
The University of Northampton	1				1
The University of Oxford	2	2	3		7
The University of Reading	1		8	1	10
The University of St Andrews	1	1			2
The University of Stirling	2				2
The University of Strathclyde	2				2
The University of Warwick	1				1
The University of Wolverhampton	2				2
Trinity Laban Conservatoire of Music and Dance	1				1
Universities UK	2				2
University of Abertay Dundee	2				2
University of Cumbria	2				2
University of Derby	1				1
University of Gloucestershire	2				2
University of Newcastle-upon-Tyne	1				1
University of Northumbria at Newcastle	2	5	4		11
University of Nottingham	2	3			5
University of South Wales	2		11		13
University of the Arts, London	1	5			6
University of the West of England, Bristol	2	5			7
University of Ulster	2				2
Grand Total	122	169	123	8	422

* The figure for Heidi Plus Gold Users does not include Lead Contacts, who also automatically have Gold User access.

Details of upcoming development

The heidi Service Team are continuing to develop the Heidi Plus service. The key areas of working over the coming six months are as follows;

1. Application Process

Providing continued support for organisations with the Heidi Plus application process and user migration.

2. Data source production

Continuing the production and quality assurance of historical and current year data not yet available within Heidi Plus, to include;

- HESA DLHE
- HESA EMR
- SCONUL and NSS data (following discussions with Data Suppliers)
- Historical data for HESA Finance and HESA HE-BCI

3. HESA dashboard development

The team will be looking to develop a suite of HESA dashboards over the coming months providing easily accessible and interactive analysis for all Heidi Plus users, covering all data sources.

This development will focus on a number of key areas;

a) Rounded gold data (Student and Staff data) for all users:

The development of an Interactive suite of tabulations for Student and Staff data (see issue 2 below).

b) HESA dashboards for the Estates community

During March 2016 HESA provided the Information Lab Data School with a week-long project focusing on the development of innovative dashboards specifically to accompany HESA Estates data.

During the week, 10 Tableau Consultants (in training) were provided free of charge to work on the project, resulting in the development on 8 fully functioning Tableau dashboards which have now been provided back to HESA for further consideration and development.

This project has proved very useful in demonstrating what is possible to create with HESA data, as well as giving the team a head start on this work.

c) Integration of Heidi Lab Dashboards

The team will be working with Jisc to refine and publish a range of dashboards created as part of the Heidi Lab project (to be discussed later in the meeting).

d) Review of user feedback

During HESA training sessions and events, we have been asking attendees to tell us what topics they would like to be covered within new HESA dashboards. The team will be reviewing feedback to date and will identifying key areas for development. **It is likely that we will be asking the Group for assistance with prioritising this development in due course and also for additional ideas for dashboard content.**

Feedback from users and current issues

User feedback so far has been very positive, however a number of key areas have emerged where users feel additional development or support is required. This section provides an overview of these and HESA's proposals for addressing these areas. This is both for information and **the Group are asked for their feedback on the proposed solutions.**

1. Data source linking

Within Heidi Plus analysis currently has to be undertaken on single data source basis. It is not possible (as it was with heidi) to analyse two or more data sources within the same workbook.

Users have raised this as an issue, noting that this will limit their ability to undertake the analysis they wish to do within the Heidi Plus interface.

How HESA plan to address this

HESA is currently in discussions with our Vendor to confirm whether the ability to blend data sources is a feature that will be made available within Tableau Server, and if so, when this feature is likely to become available. However, Tableau tend not to be very forthcoming about functionality improvements much in advance of the version releases that include them.

Depending on the outcome of these discussions, **the Group will be asked for guidance on whether resource should be spent on designing a series of master data sources, which combine key data items from across the range of HESA data sources. We would welcome the Groups feedback on what these data items should be in order to cover the key requirements in this area. A particular challenge in this area is that HESA could spend a considerable amount of resource preparing such combined data sets only to see a Tableau Server release which includes data blending which largely renders the HESA work as redundant. We are unlikely to get significant notice of such a release.**

2. Access to Student and Staff data for non-Gold users

Following recent discussions with the Scottish Planners Forum, concerns have been raised regarding only Gold Level users currently having access to Student and Staff data within Heidi Plus.

It was felt that a much wider range of staff currently access rounded Student and Staff data in Heidi, but a majority of these staff would not satisfy a business case to have Gold level access within Heidi Plus (and therefore have access to unrounded Student and Staff data). Even if a business case could be made for such staff to obtain Gold accounts some HE providers feel they do not have the resources available to sustain a significant Gold user community. The view was also expressed that those who did hold Gold accounts would not be able to service this wider community with the rounded student and staff data they require. Members of the Scottish Planners Forum felt that this was a significant barrier to take-up of Heidi Plus and they are very worried about plans to decommission current Heidi in November 2016. We have not seen similar concerns expressed explicitly by other user groups, but we imagine there must be similar issues in other HE providers across the UK.

How HESA plan to address this

It is felt that this can be addressed through the future development of the HESA Dashboards facility.

This would entail HESA creating a growing range of cross-tab style dashboards for the sector which would be accessible to all Heidi Plus users. These dashboards will have in-built rounding, will be fully interactive, and would allow users to produce tabulations of data on Students and Staff from a pre-set list of fields.

This idea was floated with the Scottish Planners Group and was well-received. Planners felt that the creation of such a range of tabular dashboards should be a high priority and take precedence over the creation of more visualisation-based dashboards and over the continued development of the data content of Heidi Plus.

The Group are asked to:

1. **State whether they have experienced similar concerns to Scottish Planners**
2. **Confirm that this proposed solution would be appropriate**
3. **Put forward ideas for how the content of these dashboards could be agreed with users**
4. **Comment on the level of priority HESA should allocate to this activity, balancing against the need to continue development of the data infrastructure and other visualisation-based dashboards.**

3. [Redacted]

4. Geo-mapping

During the development of data sources for Heidi Plus it has become clear that the mapping capabilities available for some geography breakdowns for the UK are not as well developed as for other areas of the world such as North America.

Specifically, we have struggled to find a solution to enable users to map data by UK Region and UK County/unitary authority. The plotting of these areas is not available as standard, rather this would require bespoke shape files to be created (which draw the outline of an area on a map). However these cannot be incorporated within a data source and published to Heidi Plus for users to access, and therefore this is not a workable solution at the moment.

How HESA plan to address this

HESA has consulted our software vendor for Tableau and is investigating a range of options. We are making improvements to the geographical data in Heidi Plus but weaknesses in UK geography remain. We will continue discussions and exploration of options. We have also made representations to Tableau through our vendors to encourage some focus in the development roadmap to better coverage of UK geographies by default.

5. Decommissioning of heidi

It is currently planned that the last data source will be published within heidi during July 2016, and heidi will be decommissioned in November 2016. It is planned that running heidi and Heidi Plus concurrently for one year will firstly allow time for organisations to complete the application process and set up users, and secondly allow users to build up confidence in the use of Heidi Plus and, if they wish, recreate any analysis that they currently have within heidi, within Heidi Plus.

During recent discussions with the Scottish Planners Forum, and the concerns raised regarding non-Gold users requiring access to rounded Student and Staff data, a question was raised regarding whether the decommissioning date for heidi should be extended until early 2017.

How HESA plan to address this

We would like to understand whether this is a wider concern amongst the user community and **ask the Group for feedback as to whether they are aware of further concerns regarding the planned decommissioning date for heidi.** We feel that any extension to the active running of Heidi beyond November (including further data updates) would be unsustainable with current resource levels. It may be possible to keep the current Heidi service live beyond November for a further period but with a static data content. **Do members of the group feel that this would be worthwhile?**

6. Heidi Plus API

An API was part of the original development plan for Heidi Plus, and HESA is now in the position to begin planning this work. Firstly, we would like to gauge the opinion of the Group regarding this work, and whether this is still felt to be a requirement for the Heidi Plus service.

How HESA plan to address this

We would like to understand whether it is felt that there is still a need for an API for Heidi Plus, due to the ability to download data easily through the interface. **We would be grateful of advice from the Group regarding this.**