

Heidi Stakeholder Group

Date Tuesday 12th April 2016
HESA, 95 Promenade, Cheltenham

HSG/16/01/03

Heidi Plus usage metrics

It is important that a key set of metrics for Heidi Plus are agreed to enable us to;

- effectively monitor usage of the service
- inform future data and dashboard development, and
- make comparison between usage of heidi and Heidi Plus to help us assess the success of user migration.

This paper presents a list of suggested metrics for Heidi Plus. The group are asked to assess these metrics to ensure they cover the key areas of interest, and put forward any additions to the suite. These metrics will form a regular agenda item at Heidi Stakeholder Group meetings from October 2016.

Background

We have been monitoring usage of heidi since its release in 2007, and the set of metrics used has evolved over time. As functionality within heidi and Heidi Plus is fundamentally different, the set of metrics monitored for Heidi Plus cannot replicate the set we have used for heidi exactly. However, in order to make some form of comparison between usage of heidi and Heidi Plus to help us assess the success of user migration, it would be advantageous for some metrics to remain the same where technically possible.

Information about user interactions are stored routinely by Tableau Server, and therefore we have a range of user data to choose from. HESA is able to interact with this data to design a set of dashboards and tabulations to enable regular monitoring of the service.

The data collected by Tableau Server can be analysed at individual user level, site level or server level, and can easily be aggregated to represent different time periods.

Below is a copy of the current Heidi metrics, with an indicator to show which metrics can continue to be monitored for Heidi Plus, and therefore provide continuity;

Statistic	Can be replicated for Heidi Plus	Notes
Number of HE institution owned (incl. HE institution user owned) reports created and saved in period	No	This would not be a useful measure as multiple views can be created within a single workbook within Heidi Plus
Number of report views by HEI users in the period (<i>distinct reports</i>)	No	
Number of report downloads by HE users in Excel format in the period	No	Exports will be monitored through the new list of download methods - Image, data, crosstab, PDF
Number of report downloads by HE users in XML format in the period	No	Exports will be monitored through the new list of download methods - Image, data, crosstab, PDF
Number of HE institution owned (incl. HE institution user owned) patterns charts created in period	No	It is likely that we can monitor use of different 'Show me' visualisation types
Number of HE institution owned (incl. HE institution user owned) other charts created in period	No	It is likely that we can monitor use of different 'Show me' visualisation types
Number of HE Institution owned charts downloaded to PowerPoint in the period (<i>distinct charts</i>)	No	Exports will be monitored through the new list of download methods - Image, data, crosstab, PDF
Number of HE institution owned (incl. HE institution user owned) groups created in period	No	Functionality is not comparable between heidi and Heidi Plus here
Number of HE Institution Users (administrators and normal users) created in period	Yes	
Number of HEI users active in the period	Yes	
Number of Public users active in the period	No	There is no public user access for Heidi Plus
Number of organisations with an active API key in period	Yes	If API is developed
Number of calls to the API in period	Yes	If API is developed

In addition to the above, we have discussed with our tableau vendor other suitable measures around user interaction.

Work on understanding the extent of data available to use for review is still on-going, however below is the suggested initial suite of metrics, including indicative values (not yet quality assured). It is suggested that rather than showing quarterly values initially, we show monthly values for the first year, to give us a clear picture of take up and increasing usage.

No.	Metric	Dec 2015	Jan 2016	Feb 2016	Mar 2016
1	User and organisation activity				
1.1	Number of HEP (higher education provider) Users (all role levels) created in period*	48	58	87	141
1.2	Number of HEP users active in the period*	41	80	142	208
1.3	Number of HEP organisations active in period	22	33	48	65
2	Functionality activity				
2.1	Number of new workbooks created in period	13	95	212	211
2.2	Number of new views created in period	57	253	820	444
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 (broken down by dashboard)	0	3	9	3
2.5	Number of views of Support material views in period (broken down by dashboard)	1	28	4	20
3	Data source interaction				
3.1	Number of times a data source has been accessed in period (broken down by data source – shown as a total for the purposes of this paper)	608	2414	8117	7503
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

In addition to the suite above, we will continue to provide statistics monitoring performance against service standards, including;

- System availability
 - % of system availability within normal office hours
 - % of system availability outside of normal office hours
- User support
 - Number of user queries received
 - % of queries where initial response was made within 1 working day
 - % of queries that were resolved within 2 working days
 - % of queries that were resolved within 10 working days