

heidi quick start guide



Welcome to heidi, the Higher Education Information database for Institutions. heidi contains a wide range of quantitative data about higher education including HESA student, staff and finance data.

This quick start guide aims to provide users with an overview of how to get started with the heidi reporting functionality.

Getting started

You will have been set up as a heidi user by one of your organisations local administrators. Each local administrator is responsible for managing access to heidi at their respective organisation. When your account was created your local administrator will have assigned you a user role, to which they would have granted permission to do one or more of the following:

- Create your own reports.
- Create your own groups.
- View reports that others have created by granting you access to view one or more folders (folders contain reports, and can be created by the heidi support team at HESA or by your organisation).

Your role can be seen next to your name on the top right hand side of the heidi menu bar.

Screen shot 1 – the heidi home page

The screenshot shows the heidi home page with a navigation bar at the top containing 'Home', 'Reports', 'Groups', 'Help', and 'My details'. The user is logged in as 'Example user (expert user)' and the version is '0.2.0.12'. There are two buttons: 'Create new report' and 'Create new group'. The main content area is divided into several sections:

- Getting started:** Contains five buttons: 'Virtual tour', 'Quick start guide', 'View report', 'Create report', and 'Change password'.
- My recent reports:** A table listing recent reports:

Report name	Year	Last used
1 Example report	2007/08	02-Mar-2011
2 Example report 2	2008/09	02-Mar-2011
3 Example report 1	2008/09	02-Mar-2011

- heidi news:** A list of news items with dates and 'Read more' links:
 - February data release – 2009/10 HESA student data and 2008/09 HE-BCI Part A** (24-Feb-2011): Data release – the 2009/10 HESA Student data (including heidi equality update) and 2008/09 HE-BCI Part A data are now available in heidi to subscribed users.
 - heidi downtime message 1 February 2011** (26-Jan-2011): heidi will be unavailable between 7.00am and 7.30am on Tuesday 1 February 2011 due to system maintenance.
 - heidi downtime message 18 January 2011** (10-Jan-2011): heidi will be unavailable between 7.00am and 9.00am on Tuesday 18 January 2011 due to system maintenance.
 - Christmas message 2010** (20-Dec-2010): The heidi support service will be unavailable from 3.00pm on Thursday 23 December 2010 until 9.00am on Tuesday 4th January 2011. Any support requests submitted during this period will be dealt with during the first week of January. Happy Christmas ...
 - heidi equality – ECU statistical reports 2010** (17-Nov-2010): heidi equality – following the launch of 'Equality in higher education: statistical report 2010', released by Equality Challenge Unit this week, a set of accompanying report folders are now available on heidi to subscribed users. The report provides a national ...
 - October data release – 2008/09 FFMS and HEMS** (29-Oct-2010): Data release – the 2008/09 Funders Forum Metrics and 2008/09 Higher Education Management Statistics (HEMS) are now available in heidi to subscribed users.
 - Data release – SCONUL 2008/09** (23-Sep-2010): Data release (new for 2010) – the 2008/09 SCONUL Library Management Statistics are now available on heidi to subscribed users. These statistics are designed to be of use to senior managers in higher education institutions as well as those directly ...
- heidi release schedule:** A list of reports scheduled for release, currently showing 'March 2011':
 - 2009/10 HESA staff data
 - 2009/10 HESA finance data
 - 2009/10 Key Financial Indicators
 - 2009/10 Student Staff Ratios
 - 2009/10 Performance Indicators tranche 1The month can be changed to 'April 2011'.

If your role is limited to only viewing reports, you will only be able to view reports that the heidi support team and your organisation have created for you to view. The guidance below will show you how to view reports, and also how to create a basic report if you have permission to do so.

Viewing reports

heidi contains a range of reports created by HESA that can be viewed. Each report belongs to a folder, and your local administrator will have decided which folders would be of interest to your role when your user account was created.

Screen shot 2 – the Manage report screen

The screenshot shows the 'Manage reports' screen in the Heidi application. At the top, there is a navigation bar with 'Home', 'Reports', 'Groups', 'Help', and 'My details'. A secondary bar contains actions like 'Create new report', 'Update report', 'Delete report', 'Copy report', 'Roll report forward', 'Search reports', and 'Reset filter'. The main content area is titled 'Manage reports' and includes a sub-header: 'Below is a list of folders. Within each folder is a list of reports. To order the list of reports click on the respective column heading'. Below this is a table with columns: Name, Owned by, Created by, Date created, and Year. The table lists several folders, including 'My folder (2 items)', 'heidi equality standard reports - staff 2007/08 (4 items)', 'heidi equality standard reports - students 2007/08 (4 items)', 'HESA standard charts - UUK Patterns 2006/07 (4 items)', 'HESA Standard Reports - 2005/06 (8 items)', 'HESA Standard Reports - 2006/07 (5 items)', and 'HESA Standard Reports - 2007/08 (4 items)'. Each folder is expanded to show a list of reports with their respective owners, creators, and dates.

Name	Owned by	Created by	Date created	Year
My folder (2 items)	Example user			
Example report 1	Example user	Example user	02-Mar-2011	2008/09
Example report 2	Example user	Example user	02-Mar-2011	2008/09
heidi equality standard reports - staff 2007/08 (4 items)	Higher Education Statistics Agency (heidi admin)			
heidi equality standard reports - students 2007/08 (4 items)	Higher Education Statistics Agency (heidi admin)			
HESA standard charts - UUK Patterns 2006/07 (4 items)	Higher Education Statistics Agency (heidi admin)			
HESA Standard Reports - 2005/06 (8 items)	Higher Education Statistics Agency (heidi admin)			
2005/06 Finance summary	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
2005/06 postgraduate students by domicile	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
2005/06 qualifications obtained by level	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
2005/06 qualifications obtained by level & subject	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
2005/06 staff summary	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
2005/06 students by mode and level	Higher Education Statistics Agency (heidi admin)	Andy Youell	12-Apr-2007	2005/06
2005/06 students by subject, level and gender	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
2005/06 undergraduate students by domicile	Higher Education Statistics Agency (heidi admin)	Andy Youell	18-Jul-2007	2005/06
HESA Standard Reports - 2006/07 (5 items)	Higher Education Statistics Agency (heidi admin)			
HESA Standard Reports - 2007/08 (4 items)	Higher Education Statistics Agency (heidi admin)			

To view a report, follow the steps below;

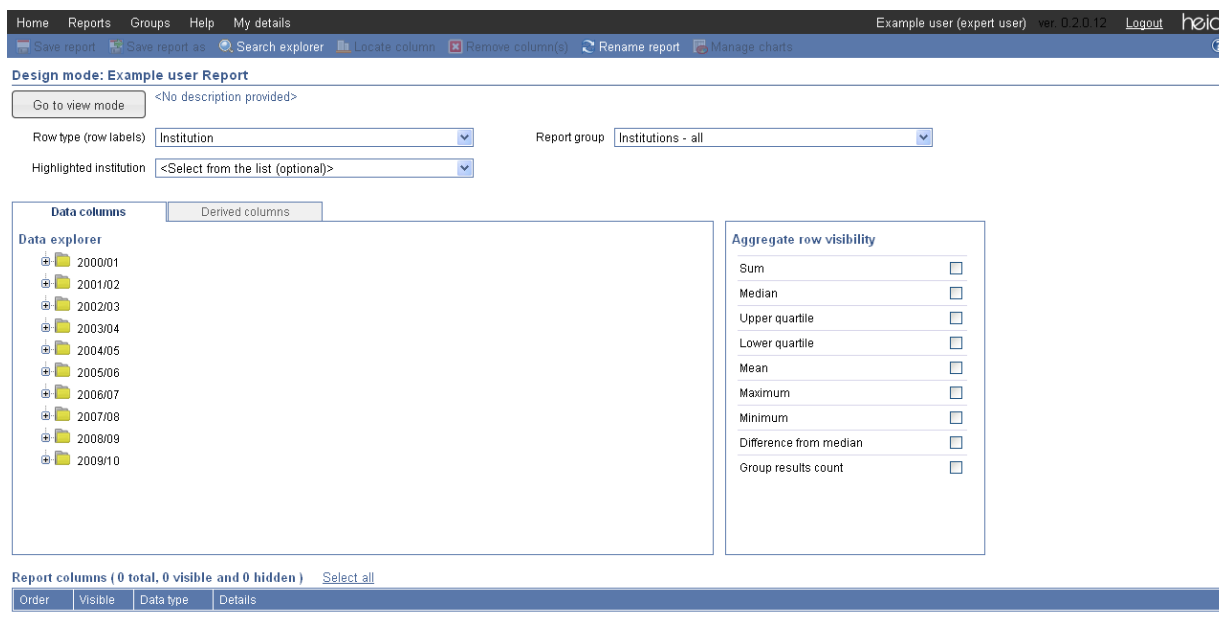
1. Click on **Reports** on the heidi menu bar to access the **Manage reports screen**. This screen is used to manage the reports that you have permission to either view or update and displays a list of folders. Within each folder is a list of reports that you have permission to either view or update. You may update reports within your personal folder (called 'My folder') or view any report contained within the other folders listed.
2. **Open a folder** containing the report that you wish to view. The folder listed first is your personal folder (called 'My folder'). Your personal folder contains all the reports that you have created and saved. Any other folders listed on the Manage reports screen are folders that you have access to view, and have either been created by your organisations local administrators for the purposes of sharing reports, or by the heidi support team for the purposes of sharing reports within all organisations. To view a list of reports within a folder, click on the folder icon next to the folder name. A list of reports that belong to the folder will be displayed.
3. **Viewing a report.** To view a report click on the report name. The report will open in view mode.

Please note that if you wish to access a folder that is not listed, please contact your organisations local administrator. You may be informed of folders that are available through heidi news items.

Creating a basic report

heidi can be used to produce reports based on the data of your choosing.

Screen shot 3 – report Design mode



To create a basic report, follow the steps below;

1. From the heidi homepage, click **Create new report** on the heidi toolbar. The report design mode will open on screen. Please note that if this link is not clickable, you do not have permission to create reports.
2. **Select a Row type.** The Row type identifies fields that can be used as the row labels on the report. The row type will be 'Institution' by default, but can be changed by selecting an alternative field from the drop down box. There are a limited number of row types available for selection, based on the most commonly analysed fields within HESA publications. The options available within the data explorer will reflect data analysable by the row type selected.
3. **Select a report group.** The Report group dropdown list will show all available groups for the **Row type** selected (i.e. if **Institution** is selected as the report row type, the dropdown will show all institution groups that you have access to, either created by the heidi support team, your organisation or by you, if you have permission to create your own groups). Groups are a useful way of restricting the data that is displayed within your report to a relevant comparator group for the row type selected. To select an alternative group click on the arrow by the side of the drop down box and click on the group that you would like the report to display.
4. **Select data to include within your report** from the data explorer box. The **Data explorer** allows you to drill through the available data (based upon the row type selected) to the level of detail appropriate for your needs. A summary of the data that is available within heidi is available on the heidi information website (<http://www.heidi.ac.uk/datasummary>). The **Data explorer** is arranged by academic year folders.

5. To select a column of data to include within your report;
 - a. Select an **academic year** from the list by clicking on the yellow folder icon next to the year. The explorer will expand to present a list of the available data for that year.
 - b. Select a **data category** by clicking on a yellow folder icon.
 - c. The **Data explorer** will expand to present further options to help clarify the data that you require, or the fields that are available for analysis for the year and data selected. Continue to expand the folder icons until you see a list of fields. Field names are underlined and have a number in brackets appearing next to them which indicates the number of categories that the field contains. To view the categories within a field click on the yellow folder icon next to the field name. To add a field category to your report as a column, click on the name of the field category. The specification of the column that you have added to your report will automatically appear in the **Report column** box.
 - d. Alternatively, to create a column for each category within a field, click on the name of the field.
 - e. If you wish to refine your column selection using more than one field/field category, rather than clicking on a field category you may click on the icon next to the field category. The data explorer will then present the remaining fields available for analysis. You may continue refining your selected data until you have specified your column or there are no further fields available for analysis.

6. **Viewing your report.** To view the report, click on the **Design mode** button at the top of the screen. Your report will appear on screen. Please note that any changes that you make to your report within the **View mode** screen will not be applied to the design specification of your report unless the **Apply updates** button on the heidi toolbar is clicked.

Screenshot 4 – Report View mode

View mode: Example report

Go to design mode <No description provided>

You have made changes to this report in view mode. To retain these changes click **Apply updates**

Report group: 2006/07 HESA Institutions - Wales

Highlighted institution: Cardiff University

Adjust report years: <Select next item to process alternative year options>

Institution name style: Full name


Institution	2007/08	2007/08
	Student instance count - HE First years All domiciles Mode of study (basic) Full-time	Student instance count - HE First years All domiciles Mode of study (basic) Part-time
<input type="checkbox"/> Abenystwyth University	2,620	1,345
<input type="checkbox"/> Bangor University	3,785	1,255
<input type="checkbox"/> Cardiff University	7,720	5,300
<input type="checkbox"/> University of Wales Institute, Cardiff	3,990	1,305
<input type="checkbox"/> University of Glamorgan	6,010	7,575
<input type="checkbox"/> Glyndwr University	1,315	3,420
<input type="checkbox"/> The University of Wales, Lampeter	815	1,930
<input type="checkbox"/> The University of Wales, Newport	1,575	3,115
<input type="checkbox"/> Royal Welsh College of Music and Drama	0	0
<input type="checkbox"/> Swansea Metropolitan University	1,750	1,025
<input type="checkbox"/> Swansea University	4,370	2,560
<input type="checkbox"/> Trinity University College	565	480
<input type="checkbox"/> The University of Wales (central functions)	0	0

University College Falmouth - 2007/08 and 2008/09

Dartington College of Arts merged with University College Falmouth in 2007/08 but continued to make separate returns for that collection year. A single return has been made in 2008/09.

Population changes - 2007/08

The specification of the HESA session and HESA standard registration populations has changed from 2007/08. Students on sabbatical are no longer included in these populations and additionally, writing-up students are not included in the HESA standard registration population.

7. **Notes and definitions.** You are advised to read the accompanying notes and definitions for the data within your report. These will appear within the help pane, accessible by clicking on the  icon on the top right-hand corner of the screen.
8. **Downloading your report.** You may download your report to Excel or XML by clicking on the links on the heidi toolbar
9. **Saving your report.** If you wish to save your report for future use, you will need to click on **Save report** on the heidi toolbar. Your report will be given a default name, however you may overwrite this when you save your report to a more meaningful name. Once saved, your report will be accessible by opening your personal folder (called My folder) on the Manage reports screen, which can be accessed by clicking on **Reports** on the heidi menu bar. Please note that reports created and saved to your personal folder are private to you (or other local administrators if you are logged in as a local administrator).

To illustrate how to create a basic report, please see the example below:

Example exercise – creating a basic report

During this exercise you will be creating a basic report containing student data analysed by gender for 2008/09.

- a) Click on **Reports** on the heidi menu bar.
- b) Click **Create new report** on the heidi tool bar.
- c) Select **Institution** as the report Row type.
- d) Select the data to be included within your report from the **Data explorer**, located within the Data columns box. Follow the path below through the data explorer (hint: click on the yellow folder icons to expand the folders);
 - 2008/09,
 - HESA student,
 - Student instance count – HE,
 - First years,
 - UK domiciled
- e) Click on the text link Gender. 3 columns will be selected and appear in the **Report columns box** at the bottom of the screen.
- f) Select the group **2008/09 HESA Institutions – all** from the Report Group dropdown box.
- g) Save your report by clicking **Save report** on the heidi tool bar.
- h) To view your report, click **Go to view mode**. Your report will be displayed on screen.

Other features

This guide has covered the basics of getting started with heidi, however there are many more facilities to explore and use, depending on your user role. These include;

- Advanced report features, such as creation of derived columns and charts.
- Creation of your own customised groups, which you may apply to your reports.
- Sharing reports with your colleagues by using folders.

Further details can be found within the **heidi user guide**, which can be found by hovering over Help on the heidi menu bar and clicking **User guide** from the dropdown.

Getting help

If you have a query when using heidi, your first step should be to read the page specific help, which is available in the help pane.

Screenshot 5 – the heidi help pane

The screenshot shows the heidi help pane with the following sections:

- Getting started**: Includes buttons for Virtual tour, Quick start guide, View report, Create report, and Change password.
- My recent reports**: A table with columns for Report name, Year, and Last used.
- heidi release schedule**: A list of reports for March 2011 and April 2011.
- heidi news**: Contains several news items such as 'February data release – 2009/10 HESA student data', 'heidi downtime message 1 February 2011', 'heidi downtime message 18 January 2011', 'Christmas message 2010', 'heidi equality – ECU statistical reports 2010', 'October data release – 2008/09 FFMS and HEMS', and 'Data release – SCONUL 2008/09'.
- heidi homepage**: A welcome message and a list of links to various help sections.

Report name	Year	Last used
1 Example report	2007/08	02-Mar-2011
2 Example report 2	2008/09	02-Mar-2011
3 Example report 1	2008/09	02-Mar-2011

Month	Report Name
March 2011	2009/10 HESA staff data
	2009/10 HESA finance data
	2009/10 Key Financial Indicators
	2009/10 Student Staff Ratios
	2009/10 Performance Indicators tranche 1
April 2011	

If this does not answer your query, please refer to the heidi use guide, frequently asked questions, and heidi training videos, which are all available on the **heidi help menu**.

If you still have a query, please contact your organisations local administrators, who will be able to assist you further. Your local administrators will either be able to assist you with your query, or alternatively pass your query on to the heidi support team.

We hope that you enjoy using heidi.

heidi support team

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