

heidi 3.1 – Release notes



This document describes the changes that have been incorporated in heidi 3.1, which was released on Friday 30 October 2009. The changes in heidi 3.1 cover areas that have been highlighted through user feedback.

To accompany the release of heidi 3.1 full guidance is provided within on-screen help and the heidi user manual. If you have any queries regarding heidi 3.1, please email heidi@hesa.ac.uk.

Summary of changes

1. Large reports - increase to the number of columns that can be downloaded to Excel and XML

To assist users with analysing larger sets of data, a *download only* facility has been introduced that enables users to add up to 80 columns to a report for download purposes only.

This facility is available for reports that contain more than 36 columns and do not already contain any of the following;

- Charts
- Derived columns
- Aggregate rows
- Formatted column headers

Screen shot 1 – selecting your chosen download method within the *Manage reports screen*

Users may specify whether they wish to download a large report (i.e. a report with more than 36 columns) to *Excel* or *XML* within the *Manage report screen*. The format of the download will be set to *Excel*, users may choose to change this to *XML* each time they log in if they wish.

The screenshot shows the Heidi web interface. At the top, there is a navigation menu with links: Home, My details, Reports, Taylor squares, Folders, Groups, Users, Roles, Logs, News, Organisation, Help, Logout. Below the menu, the user is identified as 'Example User (local administrator)'. The main content area is titled 'Manage reports' and includes a filter dropdown set to 'Local administration folder', a 'Refresh' button, and a 'Large report (download only) format' section with radio buttons for 'Excel' (selected) and 'XML'. A search bar for reports is also present. At the bottom, there are buttons for 'View report', 'Create new report', 'Update report', 'Delete report', 'Copy report', and 'Roll report forward'.

Screen shot 2 – Data columns tab within the Create report screen

To use this facility, users should create a report as normal. When more than 36 columns are added within the *Data columns* screen (and the report does not contain a chart, derived column, aggregate row or formatted column headers) a message will appear to inform the user that the report can no longer be viewed within the browser and can be downloaded only. In addition, users will no longer be able to add charts, derived columns, aggregate rows or formatted column headers to their report. Users will be able to add a maximum of 80 columns to their report.

The screenshot shows the 'Create report' interface. At the top, there is a navigation bar with links like Home, My details, Reports, Taylor squares, Folders, Groups, Users, Roles, Logs, News, Organisation, Help, and Logout. Below this is a breadcrumb trail: 'You are here: Home Reports Update report'. The user is identified as 'Example User (local administrator)'. The main heading is 'Create report : Large report (download only)'. A prominent message box states: 'PLEASE NOTE: This report contains between 37 and 80 columns and therefore is available for download only. Also charts, aggregate rows, derived columns and formatted column headers may not be created for this report. If these restrictions are not acceptable reduce the report size by removing columns until no more than 36 remain. Refer to help for further details.' Below the message, there are tabs for 'Report overview', 'Data columns', 'Derived columns (optional)', 'Report options (optional)', and 'Manage charts (optional)'. The 'Data columns' tab is active, showing a 'Data explorer' tree with folders like '2007/08', 'HESA student', 'Student FPE - HE', 'All years', 'All domiciles', 'Mode of study (basic) (2)', 'JACS Subject Area (19)', 'Level of study (detailed) (4)', 'Year of Programme (8)', and 'Region of Domicile (3)'. At the bottom, it says 'Report columns (37 total, 37 visible and 0 hidden)'.

Users may still amend the group used for the report within the *Report options (optional)* screen.

To download the large report users should click the *View & save report* button. When this button is pressed the report will be downloaded to either *Excel* or *XML*, depending on the download method that the user has selected within the *Manage reports* screen. **Please note** that large reports will take significantly longer to download due to their size.

Screen shot 3 – downloading large reports from the Manage reports screen

Users may also download large reports from the *Manage report* screen. Large reports are identified by the wording *{download only}* appearing after the report name.

The screenshot shows the 'Manage reports' interface. At the top, there is a navigation bar with links like Home, My details, Reports, Taylor squares, Folders, Groups, Users, Roles, Logs, News, Organisation, Help, and Logout. Below this is a breadcrumb trail: 'You are here: Home Reports'. The user is identified as 'Example User (local administrator)'. The main heading is 'Manage reports'. There are filters for 'Filter by folder' (set to 'Local administration folder') and 'Large report {download only} format' (with radio buttons for 'Excel' and 'XML'). A search bar is present with the text 'Search reports' and a 'Find' button. Below this, it says '(3 items)'. A table lists the reports:

Select	Charts	Name▲	Owned by	Created by	Date created	Year
<input type="checkbox"/>		Report 1	Test organisation	Example User	2009-10-24	2002/03
<input type="checkbox"/>	+	Report 2	Test organisation	Example User	2009-10-24	2004/05
<input type="checkbox"/>		Report 3 {download only}	Test organisation	Example User	2009-10-24	2005/06

At the bottom, there are buttons for 'View report', 'Create new report', 'Update report', 'Delete report', 'Copy report', and 'Roll report forward'.

Users may download a large report from the *Manage reports screen* by either clicking on the name of the report or by selecting the tick box next to the report and clicking *View report*. In both cases the report will automatically download in your chosen format.

2. Increase in number of visible columns in reports viewable within the browser

In addition, the number of columns that can be viewed within a browser on the *View report screen* has been increased from 24 columns to 36 columns (previously users could add a maximum of 36 columns to a report, however only 24 could be viewed within the View report screen, the other 12 being hidden).

Users are still able to hide columns that they do not wish to include within their report if they wish.

3. Institution short names

It is now possible for users to change the way that Institution names are displayed within reports that use *Institution* as their row type. This facility is especially useful in improving the appearance of charts.

Users may access this functionality within the *View report screen* by clicking on the *Institutional name style* drop down box located near the top of the screen and select one of the options, followed by *Refresh*;

- **Full name** – the full name of the institution, set as default
- **Short name** – a six letter abbreviation of the institution name
- **Combination** – a combination of the two items above (the six letter abbreviation of the institution name followed by the full institution name)

The format of the institution name will change to the style selected.

Screen shot 4 – Changing the display of institution names within the *View report screen*

The screenshot shows the Heidi system interface. The navigation bar includes Home, My details, Reports, Taylor squares, Folders, Groups, Users, Roles, Logs, News, Organisation, Help, and Logout. The breadcrumb trail shows 'You are here: Home > Reports > View report'. The user is identified as 'Example User (local administrator)'. The 'Report 4' section contains several controls: 'Report view' set to 'Tabular view', 'Adjust report year' set to 'Click Refresh to view year adjustment options', 'Report group' set to '2005/06 HESA Institutions - Northern Ireland', and 'Institution name style' set to 'Full institution name'. A 'Create group' button is also present. Below these controls is a table with three columns of data for the year 2005/06, each with a 'Numeric data' label.

	2005/06 Student FPE - HE All years All domiciles Region of Domicile United Kingdom	2005/06 Student FPE - HE All years All domiciles Region of Domicile Other European Union	2005/06 Student FPE - HE All years All domiciles Region of Domicile Non European Union
Institution	Numeric data	Numeric data	Numeric data

Changes to the institution name style are temporary, however can be applied for downloading purposes. The institution name style will always default back to full name.

An example of the three styles is shown below;

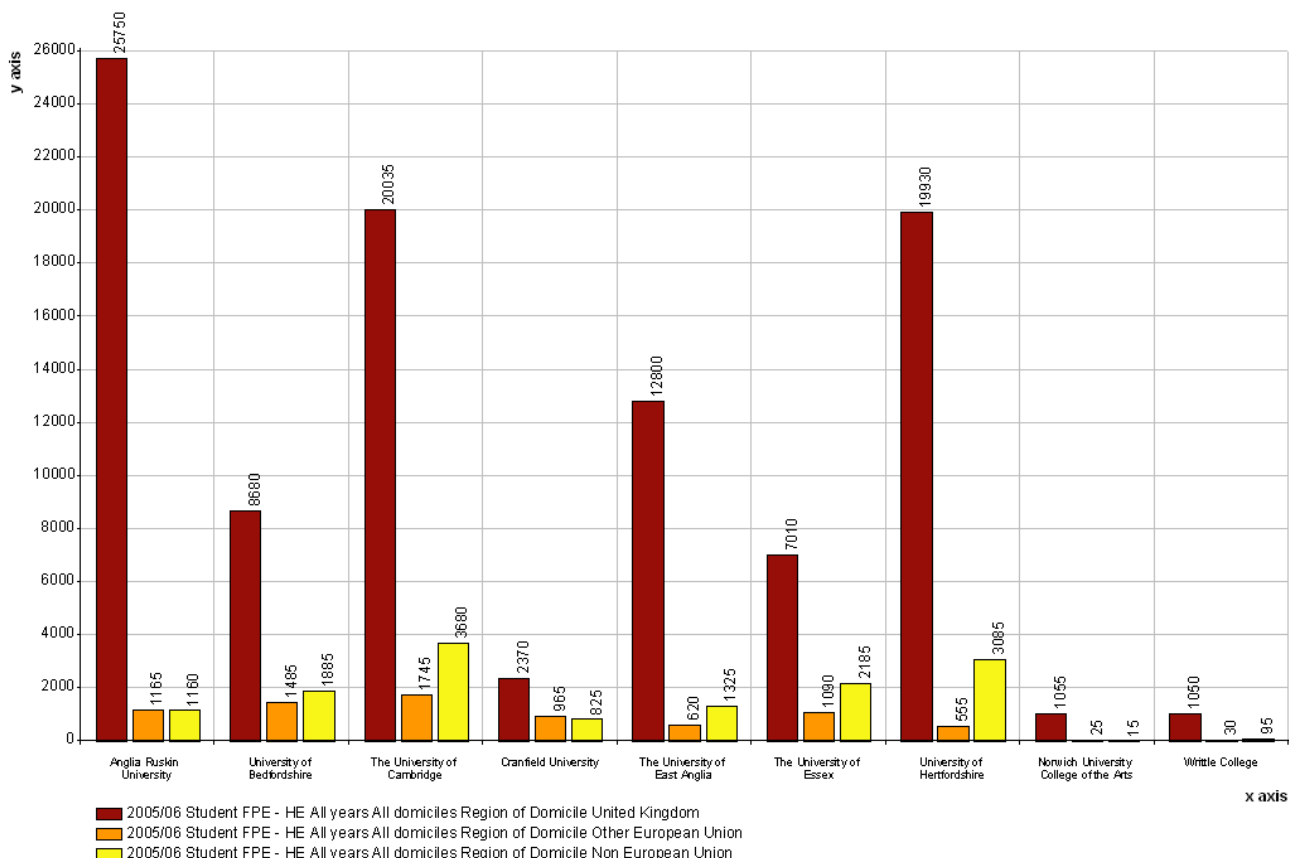
Full name	Short name	Combination
The University of Aberdeen	ABDEEN	ABDEEN The University of Aberdeen
University of Abertay Dundee	ABRTAY	ABRTAY University of Abertay Dundee
Aberystwyth University	ABRYST	ABRYST Aberystwyth University

Institution short names may be applied to the following types of charts (where *column* is selected as the *Series in*), to improve their appearance. Please note that the option *Combination* is not available when viewing a chart;

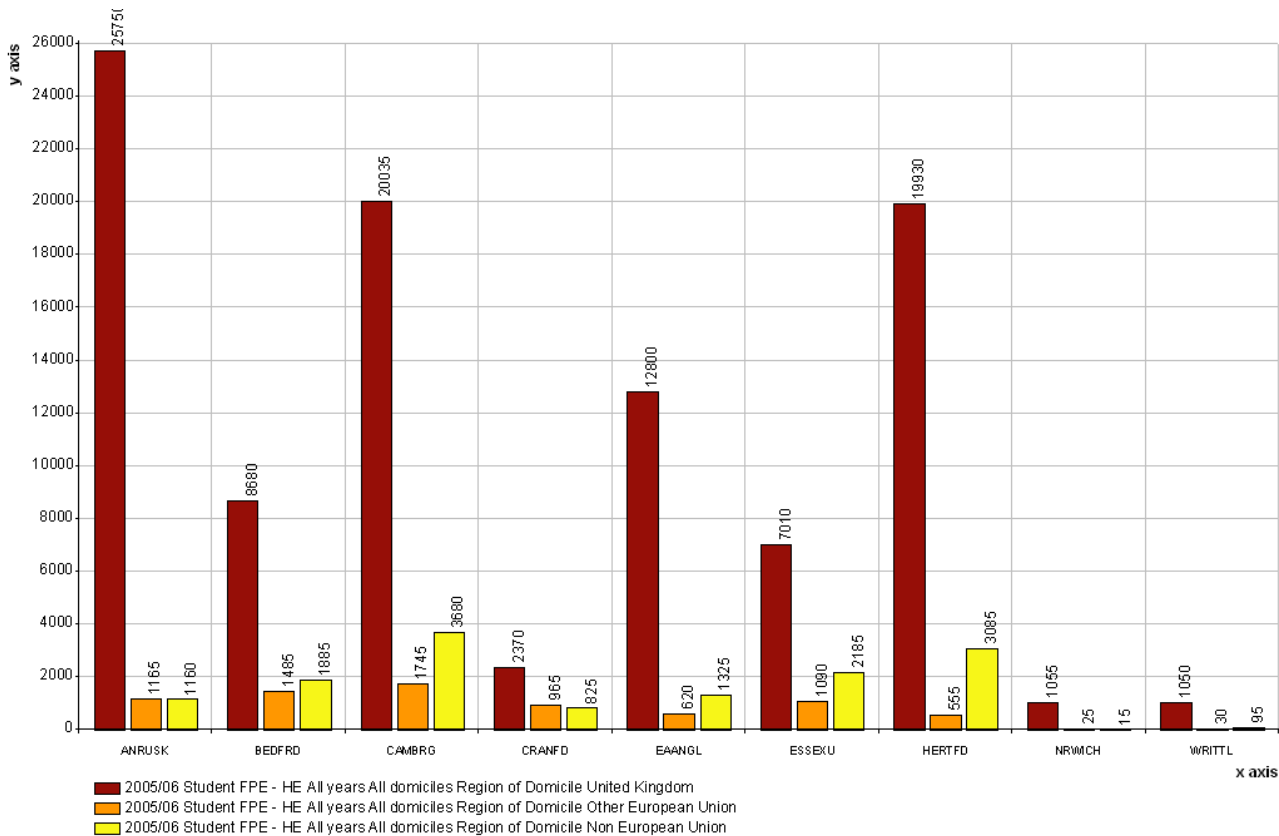
- Bar charts
- Column charts
- Line charts
- Pie charts

Users may access this functionality when viewing a chart within the *View report screen* by clicking on the *Institutional name style* drop down box located near the top of the screen and selecting the style of their choice.

Screen shot 5 – Example of a *column chart* with *full institution name* applied



Screen shot 6 – Example of the same *column chart* with *Short names* applied



4. Data explorer enhancement - unabbreviated text

A facility has been introduced to the top levels of the *data explorer* to allow users to hover over a phrase that includes an acronym and a full version of the text will appear.

Screen shot 7 – viewing acronyms within the *data explorer*

The screenshot shows the Heidi interface with the following elements:

- Navigation Bar:** Home, My details, Reports, Taylor squares, Folders, Groups, Users, Roles, Logs, News, Organisation, Help, Logout.
- User Information:** You are here: Home Reports Update report Nicola Phelps (local administrator)
- Report Header:** Create report : Report 6
- Report Options:** Report overview, Data columns, Derived columns (optional), Report options (optional), Manage charts (optional)
- Data Explorer:**
 - 2004/05
 - Applications
 - GTTR accepted applicants
 - Graduate Teacher Training Registry accepted applicants (click to expand the tree)
 - NMAS applications
 - UCAS accepted applicants
 - UCAS applications

To access this facility users should hover their mouse cursor over the yellow folder icon next to the text which they wish to view in full within the *Data columns screen*. A *tooltip box* will appear that displays the full version of the text. The box will disappear when the mouse cursor is moved away from the yellow folder icon.

Other changes

- **Change to the Report view drop down within the View report screen** - Some amendments have been made to the Report view drop down within the *View report screen*. The report name is no longer an option within the drop down list. If users wish to return to the *tabular view* of a report they should now click on the phrase *Tabular view* and click refresh. In addition, the name of this drop down has been changed from *Display report view* to *Report view*, and the length of the drop down box has been shortened.
- **Ability to adjust years for HESA finance data** - It is now possible for users to roll or adjust HESA finance data between the years 2006/07 and 2007/08 where Finance Statistic Return definitions are comparable between the two years.
- **Display of negative values in HESA finance data and Key Financial Indicators (all years)** – heidi now displays negative values in HESA finance data and Key Financial indicators using brackets rather than a minus sign (for example (1000) rather than -1000). This is in accordance with HESA publication standards and general accounting practice. This has been applied to both £s and indicators derived solely from the HESA Finance Statistics Return and therefore will also be applied to derived columns created from this data within heidi. **Please note** that this only applies to the viewing of data within the *View report screen* – when downloaded to *Excel* or *XML*, or viewing charts based on such data, minus signs will be displayed.

We hope that the release of heidi 3.1 improves the value of the system to you. We are always keen to hear feedback, especially ideas and suggestions for future releases of heidi. Please contact us at the email address below.

The heidi team

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