heidi 3 - Pre release notes



This document describes the changes that will be incorporated in heidi 3 which is to be released on Monday 14 September 2009. The changes in heidi 3 have resulted from analysing user feedback and a process of prioritisation by the heidi User Group. The development plan for heidi 4 is now nearing completion and requirements for future releases of heidi are continually being sought.

To accompany the release of heidi 3 a number of training videos showing the new functionality will be published on the heidi information web site when heidi 3 is released. In addition full guidance is provided within on-screen help and the heidi user manual.

If you have any queries regarding heidi 3, please email heidi@hesa.ac.uk.

Summary of changes - system

Report enhancements

1. New categorisation of data explorer

To assist users in locating data, a new top level data categorisation has been added to the data explorer, which groups together similar data in one place. This functionality will be available to all users within the *Data columns* tab of the *Create report* screen.

Screen shot 1 – Data columns screen showing new level of data explorer

	me My details	Reports	Taylor squares	Folders Group	s Users	Roles	Logs	News	Organisation	Help	Logout	heid
Create report : New rep	oort								Example user (ocal admini	strator)	Information database for itstitut
Report overview	Data column:	s Di	erived columns (optio	nal) Report options (optional)	anage cha	arts (optio	nal)				
Data description searc	h									Show	<u>10</u> / <u>Show 1</u>	5 / Show 20 / Auto resize
	ns atistics nce f fent tudent Survey evelopment Agency											
Report columns (0 tot	al, 0 visible and 0 i	hidden)										

Below is a list of the new data categories along with the current data categories which are now grouped under them;

New data category	Previous data categories grouped within new category
Applications	CUKAS accepted applicants, CUKAS applications, GTTR accepted
	applicants, GTTR applications, NMAS accepted applicants, NMAS
	applications, UCAS accepted applicants and UCAS applications
Derived statistics	Estate Management Statistics, Funders Forum Metrics (FFM), HEMS,
	Performance Indicators, Student Staff Ratios and UK Pattern data
Equality	Student, staff and destinations of leavers equality data
HESA destinations of leavers	Destinations of leavers data
HESA finance	Finance Return (£000s) and Key Financial Indicators
HESA staff	Staff FPE and Staff FTE
HESA student	Student FPE – HE, Student FTE – FE, Student FTE – HE, Student
	instance count – FE and Student instance count - HE
National Student Survey	summary results from the National Student Survey
Research Assessment Exercise	summary results from the Research Assessment Exercise
Training Development Agency	Training Development Agency data

2. Data description search facility

A search facility has been introduced to enable users to search the contents of the data explorer to assist in locating data. This functionality will be available to all users within the *Data columns* tab of the *Create report* screen

Screen shot 2 – Data description search button on the Data columns tab

Users may access the *Data Description search* facility by clicking on the *Data descriptions search* button within the *Data columns* tab of the *Create report screen*. The *Find data descriptions* box will appear.

	3							A.						he
e here: Home F	teports	Update report							-	-	Example user	(local admin	istrator)	Information datab
e report : New r	eport													
Report overview	-	Data columns	De	rived columns	(optional) Re	port options (o	ptional) 1	lanage cha	arts (optio	nal)				
Data description se	arch		195											
ta explorer	aicii											Show	10 / Show 1	5 / Show 20 / Auto
E 2000/01												0.101	10. 01011	or onen der nate
± C 2001/02														
± C 2002/03														
E 2003/04														
± 🗋 2004/05														
± 🗋 2005/06														
± 🗀 2006/07														
E 🗋 2007/08														
± 🗀 2008/09														
ant columns (0 t	atal 0 vi	ible and 0 bi	ddan)											
Sort columns (0 t	otal, u vi	sible and v m	uden)											

Screen shot 3 – The Data descriptions search box

Users may use this facility to enter a word or phrase as their search criteria. There are two boxes which allow users to search for two unconnected words or phrases. In addition the search may be restricted to one year or all years, and to matching whole words within the search. The *Find now* button will bring back a list of search results.

here: Home Reports Upo	tate report Example user (local administrator)
Report overview Dat	a columns Derived columns (optional) Report options (optional) Manage charts (optional)
Data description search	
Find data descriptions that or	
This word or phrase: And this word or phrase (optiona ote: This facility can locate data de ontain both sets of words will be n	Image: Contract in the second seco
This word or phrase: And this word or phrase (optiona ote: This facility can locate data d ontain both sets of words will be n a explorer	Image: Clear Search in 2006/07 Match whole word(s) Find now Clear
And this word or phrase: And this word or phrase (optiona ote: This facility can locate data do ontain both sets of words will be r a explorer a 2000/01	Image: Contract in the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. Image: Contract in the screen i
And this word or phrase: And this word or phrase (optiona ote: This facility can locate data do ontain both sets of words will be re a explorer a contain 0 and a contain of the set o	Image: Contract in the second seco
And this word or phrase: And this word or phrase (optiona ote: This facility can locate data de ontain both sets of words will be n a explorer a contain both sets of words will be 2000/01 a contain both sets of words will be a contain both sets of word	Search in 2006/07 Match whole word(s) Find now Clear Search in 2006/07 Match whole word(s) Find now Clear Secriptions down to field name' level in the data explorer (i.e. as indicated by a yellow folder icon (b)). Where words are entered into both text boxes only data descriptions that eturned within the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. Show 10 / Show 15 / Show 20 / Auto re
And this word or phrase: And this word or phrase (optiona ote: This facility can locate data de ontain both sets of words will be re- ta explorer	Search in 2006/07 Match whole word(s) Find now Clear Search in 2006/07 Match whole word(s) Find now Clear Secriptions down to field name' level in the data explorer (i.e. as indicated by a yellow folder icon (b)). Where words are entered into both text boxes only data descriptions that eturned within the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. Show 10 / Show 15 / Show 20 / Auto re
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And this word or phrase: And this word or phrase: And this word or phrase (optiona ote: This facility can locate data do ontain bh sets of words will be re a explorer 2000/01	Search in 2008/07 Match whole word(s) Find now Clear Search in 2008/07 Match whole word(s) Find now Clear secreptions down to field name' level in the data explorer (i.e. as indicated by a yellow folder icon D). Where words are entered into both text boxes only data descriptions that eturned within the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. Show 10 / Show 15 / Show 20 / Auto re
And this word or phrase: And this word or phrase: And this word or phrase (optional ote: This facility can locate data do ontain both sets of words will be re- a explorer 2000/01 2001/02 2003/04 2003/04 2003/04 2005/06 2005/06	Search in 2006/07 Match whole word(s) Find now Clear Search in 2006/07 Match whole word(s) Find now Clear Secriptions down to field name' level in the data explorer (i.e. as indicated by a yellow folder icon C). Where words are entered into both text boxes only data descriptions that eturned within the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. Show 10 / Show 15 / Show 20 / Auto re
And this word or phrase: And this word or phrase (optiona ote: This facility can locate data do ontain both sets of words will be n a explorer	Search in 2006/07 Match whole word(s) Find now Clear Search in 2006/07 Match whole word(s) Find now Clear Secriptions down to field name' level in the data explorer (i.e. as indicated by a yellow folder icon C). Where words are entered into both text boxes only data descriptions that eturned within the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. Show 10 / Show 15 / Show 20 / Auto re

Screen shot 4 - The Search results box and locating search results within the data explorer

Users may click on a search result and the data explorer will expand and highlight the result.

are here: Home Reports Update rep	Proportion of the second of th
eate report : New report	
Report overview Data colur	nns Derived columns (optional) Report options (optional) Manage charts (optional)
Data description search	
Find data descriptions that contain:	Close
This word or phrase:	staff Search in 2007/08 V Match whole word(s) V Find nov Clear
And this word or phrase (optional):	gender
contain both sets of words will be returned Search results (5 items)	within the search results. For further details regarding the data explorer structure, please see help text at the bottom of this screen. <u>Show 5</u> / Show 10 / Show 20 / Show 3
2007/08 Equality data Staff data All staff (e	xcluding at/pical) FPE Gender
2007/08 Equality data Staff data Atypical st	aff FPE Gender
2007/08 Staff FPE All academic staff (excluding at/ni	(ding atvpical) Gender
2007/08 Staff FPE All atypical staff Gender	
Data explorer	Show 10 / Show 25 / Auto res
E 🔁 2007/08	
🖻 🔂 HESA staff	
E Staff FPE	broical)
H C Mode of emplo	yment (2)
E Activity Code	(13)
Activity 2 way s	Dilt (2)
Ethnicity 5 way	(6)
⊞ 🛄 <u>Gender</u> (3)	
dia Nationality (3	1

Please note: the facility searches data descriptions down to field name level (fields are individual entities that make up a dataset, and each field contains a number of valid entries). i.e. a search for Gender (a field name) is likely to return results, however a search for female or male (valid entries that belong to this field) will not return a result. An example of a field and its valid entries may be found on the HESA website http://www.hesa.ac.uk/staffgender20072008.

3. Multi-select years

To assist users in selecting the same data for multiple years with ease, the *multi-select year* facility has been introduced within the *data explorer*. This functionality will be available to all users within the *Data columns* tab of the *Create report* screen

Screen shot 5 – accessing the *multi-select years* facility

If data at field level is available for other years, a Y icon will be displayed to the right of the field valid entry with a number shown it in brackets. The number indicates the number of alternative years the data is available for.

You are here: Home	Home	My details	Reports	Taylor squares	Folders	Groups	Users Ro	es Logs	News	Organisation Example user (Help Logo	bt)
Create report : Nev Report overview	v report	Data columns	De	erived columns (opt	ional) Report	options (optio	onal) Manac	e charts (opt	ional)			
Data description Data explorer	search										Show 10/	Show 15 / Show 20 / Auto resize
i	A staff Staff FPE A III acac b A M b D	lemic staff (excl de of employm <u>Fuil-time</u> -⊞ <u>Part-time</u> -⊞	uding atypica ent (2) ① (5) - ① (5)	0								
Report columns (0 total, 0 v	risible and 0 h	idden)	love columns up	Move colu	mns down						

Screen shot 6 – selecting columns using the *multi-select years* facility

Users may click on the *Y* icon and a secondary list of valid field entries will appear, one for each academic year for which data is available. The original valid entry is now followed by the words 'multi-select all years' and the year at the top of the data explorer will have changed to read All years. Users may select columns for all years by clicking the 'multi-select all years' node, or alternatively may click on specific year nodes. A column for the years selected will be displayed within the *Report columns* box. Alternatively, the user may return the data explorer to its previous state by clicking on a node higher up the data explorer.

ate report : New rep	orts Update report				Example user (local administrator)	Harmonion database f
Report overview	Data columns	Derived columns (optional)	Report options (optional)	Manage charts (optional)		
Data description searc	n				Show 10 / Show	15 / Show 20 / Auto res
All years					<u>unov ro</u> , <u>unov</u>	<u>10, 0,000 20, Add rec</u>
🖻 🗔 HESA staff	Ê.					
🖻 🔂 Staff F	PE					
	Mode of employment (2)	аурісаі)				
	E Eull-time (multi-sele	ect all years) (5)				
	E Full-time (2003	/04)				
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	<u> - 포</u> <u>Full-time (2005</u>	(06)				
	·····································	(07)				
	the second se	(08)				
	Full-time (2007.					
	Full-time (2007					
eport columns (0 tota	I, 0 visible and 0 hidden)				
eport columns (0 tota	I, 0 visible and 0 hidden	1)				
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4. Locate column facility

Users may now locate a column that is specified in the *Report columns box* within *the data explorer*. This functionality will be available to all users within the *Data columns* tab of the *Create report* screen

Screen shot 7 – Locating a column within the *data explorer*

Users may use this facility by highlighting one column description within the *Report columns* box and clicking the *Locate column button* (located underneath the *Report columns* box). The data explorer will expand to its position when the column was created.



User preferences

Users are now able to set their own preferences to personalise their use of heidi. User preferences can be set within the *Preferences* tab of the *My details screen*. This functionality will be available to all users however the preferences available will vary depending on a users role permissions

Screen shot 8 – the *Preferences* tab within the *My details* screen

	Home My deta	ils Reports	Taylor squares	Folders G	roups Users	Roles	Logs	News	Organisation	Help	Logout	heidi
You are here: Home	My details								Example user (local admini	strator)	higher educatio information database for institution
Account details	Change pa	esword	Preferences									
Account details	Change pa	554010										
The role in which	you log in to heidi											
local administrator	-											
Email notification												
Tick the box if you wis heidi data/service up unsubscribe untick th	sh to receive emails fro dates (alternatively, if y ne box)	m HESA regardir ou wish to	ng 🔽									
Item list preference	es I.e. reports, grou	ps etc	how 10 C Show 20	C Show all C								
Sort the contents of	'Manago' lists by:	15 SHOW 5 10 3	510W 10 S110W 20	Show all S								
Sort and contents of	Manage 1363 by.	_	D									
Name	Ascendin	9	Descending									
Created by	0		0									
Date created	c		c									
Default height of c	lata explorer windo	N		V.M.	14944							
The approximate nu	mber of visible data fo	der/category rol	ws: Show 10 🤨 Sho	ow 15 C Show	20 C Auto re	size C						
NOTE: Once saved, u	pdates to 'Item list' ar	d 'Default height	preferences will take	e immediate effec	t and may overri	de any curre	ent sessio	n settings				
Save												

Users are able to set their own preferences for the following:

- **The role in which you log in to heidi (local administrators only)** if a user has more than one heidi role they may select the role that they would prefer to automatically log in as
- Email notification Users may tick this box if they wish to receive heidi data and service news emails. This is an opt-in service. As standard, local administrators will be opted in to this service however may opt out by unticking the box. Users that are not local administrators will be opted out of this service and may opt in if they wish. Please note: by opting out of this service there may still be occasions when emails will be sent to you with regard to your personal user account
- Item list preferences Within this section users may select the number of visible list items that they would like to appear by default within the *Manage screens* of heidi. In addition users may select a column by which they would like to sort lists within *Manage screens*. Both of these defaults may be overridden (for the current session only) within the individual screens if required
- **Default height of the data explorer** Users may select the default height of the *data explorer* by selecting the number of rows that they would like to display within the *data explorer*. To make the data explorer height amend dependant on the data available, users should select *Auto resize*. This default may be overridden (for the current session only) within the individual screens if required. Please note: this preference will only appear if users have permission to create reports.

Default groups

Users may now personalise the groups that are used as default when they create reports. As standard, all reports that are created within heidi initially use a default group (known as the *System default*). Each row type has a system default group. Users may now specify their own personal default group (known

as *My default*) for each row type if they wish to do so. This facility is available within the *Manage group screen*. This facility will be available to all users that have permission to create their own groups.

Screen shot 9 - The Update default facility within the Manage groups screen

You are h	Home H Home H Home Groups	My details Repor	ts Taylor squares	Folders Group	ps Users	Roles	Logs Nev	ws Organisation Example user (Help Logout	here independent for instruction
Manag	e groups								Show 5 / S	show 10 / Show 20 / Show all
To orde (200 iter	r the list of groups click o	n the respective col	umn heading							
Select	<u>Name</u> ▲			Owned by			Row type		Created by	Date created
0	2001/02 HESA Institutions -	All		Higher Education Sta	atistic {heidi a	dmin}	Institution		[Not known]	2008-07-26
0	2001/02 HESA Institutions -	East		Higher Education Sta	atistic {heidi a	dmin}	Institution		[Not known]	2008-07-26
C	2001/02 HESA Institutions -	East Midlands		Higher Education Sta	atistic {heidi a	imin}	Institution		[Not known]	2008-07-26
C	2001/02 HESA Institutions -	England		Higher Education Sta	atistic {heidi a	dmin}	Institution		[Not known]	2008-07-26
0	2001/02 HESA Institutions -	London		Higher Education Sta	atistic {heidi a	dmin}	Institution		[Not known]	2008-07-26
Creat	e new group Update	group Co	py group De	elete group	Update default					<u> </u>

Users may set a group as their personal default as follows:

- Click on *Groups* on the heidi tool bar
- Click the *select* box next to the name of the group
- Click on Update default
- Click *Select as default* to confirm, or alternatively click *Cancel*. By confirming this selection the group will be used by default for all reports created for this row type, from this point onwards, until an alternative default is selected
- The phrase *{my default}* will appear next to the group name on the *Manage group screen*. The group will not automatically be applied to reports that already exist.

Users may create a personal default group for each row type. If users do not create a personal default group, or de-select a personal default group, the system default group will automatically be used when reports are created.

Please note:

- If the group selected does not belong to the user, the owner of the group may amend the group and this will automatically apply to the users' reports. Therefore we would advise that if users wish to use another users' group as their default group, they create a copy of the group and set this as their default
- Users may not select two personal default groups for one row type
- If a personal default group for a row type already exists, users may either de-select the group if they wish to change it, or select an alternative group and set this as their personal default group. This will automatically override the previous personal default group
- When a personal default group is set, this will apply only to the users account (with the exception of local administrators, where a personal default can be set for all local administrators).

heidi change log

A *change log* has been introduced that lists all system and data releases since heidi went live in April 2007. This log will be regularly updated and can be accessed by all heidi users by clicking on the blue *Change log* link that appears at the bottom of the heidi screen when logged in.

	Home My details	Reports Taylor	squares Folders	Groups	Users Roles	Logs Nev	ws Organisation	Help Logout	heidi
You are nere. Home							Example user (local administrator)	Information database for institutions
View reports				Nev	/5				2i
Filter by folder Local adr	ministration folder		Refresh						
No reports in this folder									
Users and roles									
Manage users	Manage roles								
Change role									
To continue using heidi in an selected role'	n alternative role, select fro	om your available roles	listed below and click 's	Submit					
expert user 💌 Submit s	elected role								
2000-07-02 62-09 (MED- TERMEETING	Training videos Syste	m training presentation	I Data training preser	ntation Adminis	trators quick start	quic <mark>e Change</mark>	log] <mark>(nown issues S</mark> e	rvice level agreement	Terms and conditions of use

Screen shot 10 – the *heidi change log* link

Screen shot 11 – the *heidi change log* link

		heidi
Home > About heidi > Change li	99	Information
heidi change log		Main heidi site
The heidi change log displays	details of heidi system and data releases implemented since the system was released in April 2007, in reverse chronological order.	Summary data specification
		Governance
Release description:	2008 UCAS data	Advisory group
Release date:	19 August 2009	User group
Release type:	Data release	heidi order form
Release description:	2008 GTTR and CUKAS data	Subscriptions
	2007/08 Performance Indicator tables E1 and R1	Browser compatibility
Release date:	31 July 2009	Development
Release type:	Data release	heidi User survey 2009
Release type.		Resources
Release description:	2007/08 Performance indicators (excluding E1 and R1)	Posters
	2007/06 Estate management statistics	Seminars
Release date:	30 June 2009	Training Videos
Release type:	Data release	Contact
Release description:	Re-release of 2007/08 Finance data 2007/08 Key Financial Indicators 2007/08 Taylor squares data	General Sitemap WSC Introd. 1.0 -
Release date:	24 April 2009	RSS 2.0
Release type:	Data release	
Release description:	2007/08 Student staff ratios by institution and cost centre	
Release date:	22 April 2009	
Release type:	Data release	
Release description:	2007/08 Finance data (excluding table 7) 2007/08 Key Financial Indicators 2007/08 Taylor squares	
Release date:	31 March 2009	
Release type:	Data release	
Release description:	2007/08 Student 2007/08 Staff data	
Release date:	04 March 2009	
Polosco tupo:	Data raisana	

Usage statistics (available to local administrators only)

Local administrators are now able to produce a summary report on the usage of heidi within their organisation for a chosen period. This facility can be accessed from the *Usage statistics* tab of the *Logs* screen.

Home My details Reports Taylor squares Folders Groups Users	Roles Logs News Organisa	
bu are here: Home Logs	Example	user (local administrator) Noher etc.
Activity log Usage statistics		
Souge Sunsuos		
Organisation Example organisation		
Report between 2009-08-05 and 2009-09-05		
View usage statistics Download to Excel ®		
		Show 5/ Show 10/ Show 20/ Show
Statistics	Results	
Total number of active users as at snapshot date	2	
Total number of reports created in period	1	
Total number of charts created in period	0	
Total number of groups created in period	0	
Total number of Taylor squares created in period	1	
Total number of report views by active users in period***	2	
Total number of Taylor squares views by active users in period	1	
Total number of report downloads to excel by active users in period	0	
Total number of report downloads to XML by active users in period	0	
Total number of charts downloaded to PowerPoint in the period*	0	
Total number of Taylor squares downloaded to PowerPoint in the period	0	
Average number of logins per active user in period	3	
Average number of reports created per active user (with permission to create reports) in period	0.5	
Average number of charts created per active user (with permission to create reports) in period	0	
Average number of groups created per active user (with permission to create groups) in period	0	
Average number of Taylor squares created per active user (with permission to create Taylor squares) in period	0.5	
User name	e-mail	User login count for reporting period**
Example user	nicola.phelps5@hesa.ac.uk	5
Example user 2 (inactive user)	example.user@hesa.ac.uk	0

Screen shot 12 – the *Usage statistics* tab within the *logs* screen

Local administrators may create a Usage statistics report by entering a start and end date for the report period within the *Report between* date boxes and click the *View usage statistics* button. The report will display in the bottom half of the screen.

The report contains two sections:

- A set of standard statistics to monitor usage at your organisation during the period selected or at the snapshot date (the end date of the period entered)
- A list of all users at the organisation. The user list displays all users that have a user account at the organisation as of the day when the report is run. The *User login* for the reporting period column displays the number of times each user has logged into heidi between the start and end dates entered for the *Usage statistics* report. In addition users that have never logged in to heidi are identified via the wording *inactive user* appearing next to their name. Local administrators may choose to use this list to assist in managing user accounts for their organisation.

Change role facility (available to local administrators only)

If a local administrator has more than one heidi role, they may now switch between roles without logging out of heidi. The *Change role* facility is available on the heidi home page.

You are here:	Home My details Reports	Taylor squares Folders Gr	oups Users Roles	Logs News	Organisation Help Logout	beidi bernetik bernetik databes for initiality
View reports	3		News			<u></u>
Filter by folder	Local administration folder	✓ Refresh				
No reports in th	his folder					
Users and ro	bles					
Manage us	Manage roles					
Change role						
To continue usin selected role'	ng heidi in an alternative role, select from your availab	le roles listed below and click 'Submit				
expert user 💌	Submit selected role					
TENNESSEE (LATTY A	Training videos System training pres	entation Data training presentation	Administrators quick start q	uide Change log	Known issues Service level agreement	Terms and conditions of use

Screen shot 13 – the Change role facility on the heidi home page

Multiple roles (available to local administrators only)

It is now possible for local administrators to add more than one additional role to their user account. This facility has been added to give local administrators the flexibility of seeing how heidi appears to each role that they create. Local administrators may add an additional role to their user account by doing the following:

- Click Users on the heidi tool bar
- Click on *Create new user*
- Enter the email address used for your local administrator account, your name, and select the role that you wish to add to your account
- Click Save & close.

News enhancements (available to local administrators only)

Local administrators may now use the *News facility* within heidi to generate emails containing the contents of the news item to send to all users at their organisation.

Screen shot 14 – the Send to my users facility within the Create news screen

Ho You are here: Home New	me My details we Create news	Reports Taylor squares	Folders Groups	Users Roles	Logs News	Organisation Example user (Help Logout	hereford Hereford				
Complete the details below to create your news item												
Active in heidi	Tick this box if yo	ou wish this news item to app	ear on the heidi home pag	e (subject to effective d	ates)							
Name	Example news iten	n										
Display News body text	Example news iten	n										
	Send to my users (S	Save the news item before clic	king this link)									
Effective from	2009-09-05											
Effective to	2009-10-05											
Created by												
Date created	Save & close	Save	Cancel & close									

To create a news item email:

- Click *News* on the heidi tool bar
- Click on *Create news item*
- Enter a *name* and *body text* of the news item and click *Save*
- To generate an email template, click *Send to my users*. This will generate an email within your open email account which will be pre-populated with a list of user email addresses and the body text from the news item. You may now amend the email as you wish and send
- Click Save & close.

Other changes

Save facility - A Save only facility has been introduced to the following screens; Create/update report screens, Create/update group screens. This facility will allow users to save their work so far without exiting the screen. The facility is accessed via a *Save* button on these screens.

Changes to tab names within the Create report screen - Some amendments have been made to the titles of the tabs within the create report screen. For example, the *Data columns (step 2)* is now renamed *Data columns*. These do not affect the content of the tabs.

Creating charts tabs - In order to improve usability in this area, chart management and creation is now available within one permanent tab of the *Create report screen*, rather than two. The *Manage charts (optional)* tab can be used to manage charts, with a *Create chart* tab temporarily appearing when the *Add chart* button is pressed.

Summary of changes - data

In addition to the new functionality, the following data will be added as part of the heidi 3 release and will be available to all subscribed organisations:

Equality data

Work has been undertaken between HESA and Equality Challenge Unit to introduce to heidi a new stream of data designed specifically to allow users to undertake detailed analyse of equality data.

This data introduces new breakdowns of student, staff and destination data for years 2006/07 and 2007/08, and can be found within the heidi data explorer under '*Equality*'. A specification of this data can be found within the HESA data summary guide

(http://www.heidi.ac.uk/dox/heidi_summary_HESA_v1_0.pdf).

In addition Equality Challenge Unit has designed a set of 44 reports which will be available to all local administrators within the folders *'heidi equality standard reports – students 2007/08'* and *'heidi equality standard reports – staff 2007/08'*.

Local administrators should consider making these folders available to other heidi users within their organisation by updating user roles as follows:

- Click on *Roles* on the heidi tool bar
- Select a role for update and click on *Update role*
- Tick the *View* column next to *'heidi equality standard report students 2007/08'* and *'heidi equality standard report staff 2007/08'* within the heidi folder permission box
- To save the change, click *Save and close*.

New data

The following data will be added as part of the heidi 3:

- Student FTE by Institution, level of study, and subject of module (for 2001/02 to 2007/08)
- Academic staff (excluding atypical) FPE by academic employment function, cost centre and institution (2003/04 to 2007/08)
- Academic staff FTE by Institution, cost centre, academic employment function, terms of employment and source of basic salary (2003/04 to 2007/08)
- Destinations of leavers students Entering Further study FPE by JACS Principal Subject (2003/04 to 2007/08)
- New fields within the UCAS datasets (2008/09 only) previous educational sector for accepted applicants and JACS subject line data for applications and accepted applicants.

3. Future enhancements

The following functionality is currently being developed and will be released during October 2009:

- Larger report download facility increasing the number of columns that can be included within a report downloaded to Excel
- Chart enhancements the ability to use institution short names within charts
- Data explorer hover over unabbreviated help text
- Finance data adjusting years.

We hope that the release of heidi 3 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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