

## Roles Explained

### Introduction

Access to Heidi plus is available through one of three different types of user levels; Gold, Silver and Bronze. These user levels control a user's right to access certain projects within the tool.

HESA do not provide unnecessary access to projects in heidi plus, therefore you must have a business requirement for requesting a particular level.

### Projects

User levels control which projects you have access to within heidi plus. To determine which user level is most suitable for your business requirements, you must first understand what each of the projects provides access to. There are 6 projects in total.

1. Support centre
2. HESA Dashboards
3. Shared workbooks
4. Silver data
5. Gold data
6. Personal workbooks

#### 1. Support centre – Available to **Gold**, **Silver** and **Bronze**

The support centre project is the area in which training and support materials are stored to. Whilst this project is made available to all type of users, some of the content will be specific to the type of user (i.e. Gold user guide, Silver user guide and Bronze user guide) therefore not all content will be applicable to every type of user.

Users are encouraged to read through the materials applicable to their user type before using any other heidi plus project.

[Heidi comparison - similar to 'help pages'](#).

#### 2. HESA dashboards – Available to **Gold**, **Silver** and **Bronze**

The HESA dashboards project is the area where all HESA dashboards stored to. The dashboards are specific to a data source, for beta this is limited to Student and Finance. Dashboards are made up of multiple visualisations and charts in one view. Users can make use of the filters option from within a dashboard to set criteria to the data being viewed (filters may not be available for all dashboards). You cannot copy or edit these dashboards. Dashboards are created by HESA and we welcome suggestions for future dashboards.

[Heidi comparison - similar to 'HESA managed reports and charts'](#).

#### 3. Shared workbooks – Available to **Gold** and **Silver**

Shared workbooks a project where users can publish their workbooks to. These workbooks will be visible and accessible to all other Gold and Silver users at the organisation. This is a useful facility for those wishing to share information internally. It is highly recommended that users make use of this secure area of heidi plus rather than sharing work using other methods (email, saving to servers etc.).

It is important to note that shared workbooks containing silver data can be shared with both Gold and Silver users however, shared workbooks containing gold data can only be accessed by other Gold users. All shared workbooks published to this project will be visible to both Gold and Silver users at the provider, however should a Silver user attempt a workbook containing Gold data the password control embedded into heidi plus will prevent this.

[Heidi comparison - similar to 'Folders' in the 'Managed reports screen' which had been set up by a providers Local Administrator for internal use.](#)

#### 4. Silver data sources – Available to **Gold** and **Silver**

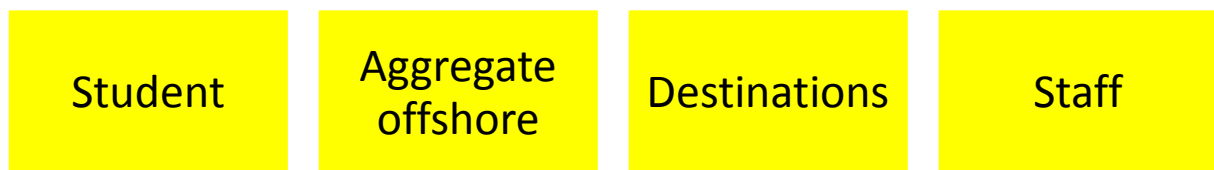


The silver data sources project contains individual data extracts made up of the HESA data displayed above. This data has been classified as 'Silver' as it contains non-personal data i.e. this data does not relate to a person. Data which is not about a person is not considered to be 'sensitive' nor covered by the Data Protection Act 1998. As a result of this, Silver users are not required to undertake data protection training before they are able to access these data sources.

Once you have selected one of the available silver data extracts from this project you can go onto create a workbook where you will be able to design your own visualisations and reports. These workbooks can then be deleted or saved to the shared workbook project or (and) the personal workbook project' (see project 6 below). Silver workbooks including the contained underlying silver data can also be extracted from heidi plus for use outside of the tool, however we would only recommend using this facility if absolutely necessary.

[Heidi comparison - similar to 'Data explorer' in the 'Design mode'](#)

#### 5. Gold data sources – Available to **Gold**



The gold data sources project contains individual data extracts made up of the HESA data shown above. This data has been classified as 'Gold' as it contains personal data i.e. this data relates to people. Data about a person is considered to be 'sensitive' and its use is covered by the obligations of the Data Protection Act 1998. As a result of this, Gold users are required to undertake data protection training before they are able to access these data sources.

Once you have selected one of the available gold data extracts from this project you can go onto create a workbook where you will be able to design your own visualisations and reports. These workbooks can then be deleted or saved to the shared workbook project or (and) the personal workbook project'. Gold workbooks including the underlying gold data can also be extracted from heidi

plus for analysis outside of the tool, however we strongly advise against using this facility. Once gold (personal) data is outside the security of the heidi plus environment you legally become a 'data controller' of that data and are responsible for appropriate onwards use and security (amongst other things).

Heidi comparison - similar to 'Data explorer' in the 'Design mode'

## 6. Personal workbooks – Available to Gold and Silver

Personal workbooks a project where users can save their own workbooks to for future use. These workbooks will not be visible or accessible to other Gold and Silver users at the organisation. This is a useful facility which prevents users from having to re-create visualisations and reports. It is highly recommended that users make use of this secure area of heidi plus rather than saving work in other external areas (Desktop, USBs etc.).

Heidi comparison - similar to 'My Folder' in the 'Managed reports screen'

### What role should I request?

Having read the individual detail about the available projects you should now be able to confidently decide which role is most appropriate to your business requirements. Remember, HESA do not grant unnecessary access to heidi plus user levels i.e. if you work within an estates department at your institution and request Gold level access you are likely to be challenged on your reasons why. If you are still unsure about which level is most appropriate, please use the flow diagram below or contact your Lead Contact (or heidi services for the purpose of beta).

