Annex A Accessing and using the HEFCE extranet

1. The HE-BCI 2007-08 survey is available for completion by institutions through the HEFCE extranet, an encrypted and authenticated web-site.

Logging in

2. You can log in to the HEFCE extranet using an e-mail address that has been registered on the site.

3. If you have used the HEFCE extranet before, log in with a registered e-mail address:
   a. Use the login page to enter your e-mail address and password. If you have forgotten your password, click the Request a new one link and another password will be sent to you by e-mail. You will then need to change this new password before you can log in fully.
   b. HEFCE extranet accounts expire every three months. If your account has expired, click the 'refresh your account' link when prompted and enter your e-mail address, password and organisation key (shown below in Paragraph 5c). Once your account has been refreshed you will be able to log in.

4. If you have not previously used the HEFCE extranet, you will need to register:
   a. Follow the Register link on the login page.
   b. Enter your e-mail address, and choose a password (at least eight characters, containing both letters and numbers).
   c. Enter the organisation key and group key:

      Organisation key: `<<Institution key>>`
      Group key: `<<Group key>>`

   d. Click the Register button.
   e. If registration was successful you will be able to follow a Login link to the main login page, where you will be able to log in.

Completing the survey

5. When you have logged in, click the HEFCE resources link, and then the Business and Community link.

6. The survey is available in two parts:
   a. Part A An online survey relating to institutional strategy and capacity.
   b. Part B An Excel document containing questions on numeric and financial outputs in academic year 2007-08.

7. To update Part A, click the HE-BCI data collection (Part A) link, and work through the questions. Any amendments that you make to the data are automatically loaded into the survey database once you press Save.

8. To download Part B of the survey, click the HE-BCI data collection (Part B) link, click the Download button on the left of your screen, and select Save when prompted. Save the zip file (compressed folder): HEBC07_package_____.zip (where the suffix identifies the institution) in a location on your network where you can access it later.

9. The zip file/package contains two files:
   a. hebc07 XXXX.xls (where XXXX identifies the institution)
   b. HE-BCI_Survey_G&D.doc

10. To complete the return, you will need to unzip the package. Windows XP and Windows ME can perform this task without a third party tool. Other operating systems will need an additional program. Go to the Online help (under Links on the right hand side of your screen) for links to web-sites to obtain one of these programs.

11. Data should be entered directly into the worksheet. Please do not use links to other Excel documents in the workbook as this will cause problems when your file is submitted to us through the HEFCE extranet. Financial data should be returned in £000s.

Submitting the completed survey

12. When you have completed the return, and are ready to submit it, log in again using your e-mail address and password. Click the Upload button and then select Browse to find the location of the file. Then **click the Upload file button**.
   a. Please ensure that your Excel workbook is saved in the '.xls' format. If your institution uses Office 2007 your Excel file will not be in this format, you will therefore need to select 'Excel 97-2003 workbook (*.xls)' in the save as type drop-down box.

13. Submitting the files may take a few minutes, depending on how busy the server is. Click the Status link to refresh your screen and see if your transaction is:
   a. Queued – the figure in brackets shows the position in the queue.
   b. Processing – data are being transferred.
   c. Completed – the processing is complete and you can download your results package.

14. When the submission process is complete, click the Results button and save your results package on your own network.

15. At the bottom of the web page there is a section labelled History of HE-BCI data collection (part B) submissions, which gives details of all files uploaded and processed for

your institution. This information will remain on the page as a record for the duration of the exercise, but can be printed if you require a hard copy record of the files submitted.

16. If at any time you forget your password for the HEFCE extranet, click the Request a new one link and another password will be sent to you by e-mail. This password will only allow limited log-in and **you will need to change this password to something of your own choice before you can log in fully**.

17. If you have any difficulties in downloading or uploading your files, please contact John Halsall (tel 0117 931 7478, e-mail j.halsall@hefce.ac.uk).