

HESA REPORTING TOOL

Your HESA Return. Done Right. Every Year.

Purpose-built for UK higher education institutions

Turning a compliance obligation into a streamlined, repeatable annual process.

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HESA: the annual reporting obligation every UK institution must meet

Each year, every UK higher education institution must submit workforce data to **HESA** — the Higher Education Statistics Agency. The data shapes decisions on equality, diversity, the gender pay gap, and funding allocation across the sector.

That data also informs regulatory change — and it feeds directly into how institutions are held to account.



Students



Staff & Graduates



Finance & Funding Sources

Submission is mandatory. Institutions that miss the deadline face financial penalties.

Most decision-makers know HESA as a compliance obligation. What they feel is the pain of preparing it.

2 The data HESA asks for is broad, sensitive, and unforgiving

HESA requires a wide range of highly sensitive staff data — and every field must conform to a strict structure before a single record can be submitted.

Date of Birth

Ethnicity

Gender

Disability

Clinical Involvement

Salary

Source of Salary

Contract & Activity



Why this matters

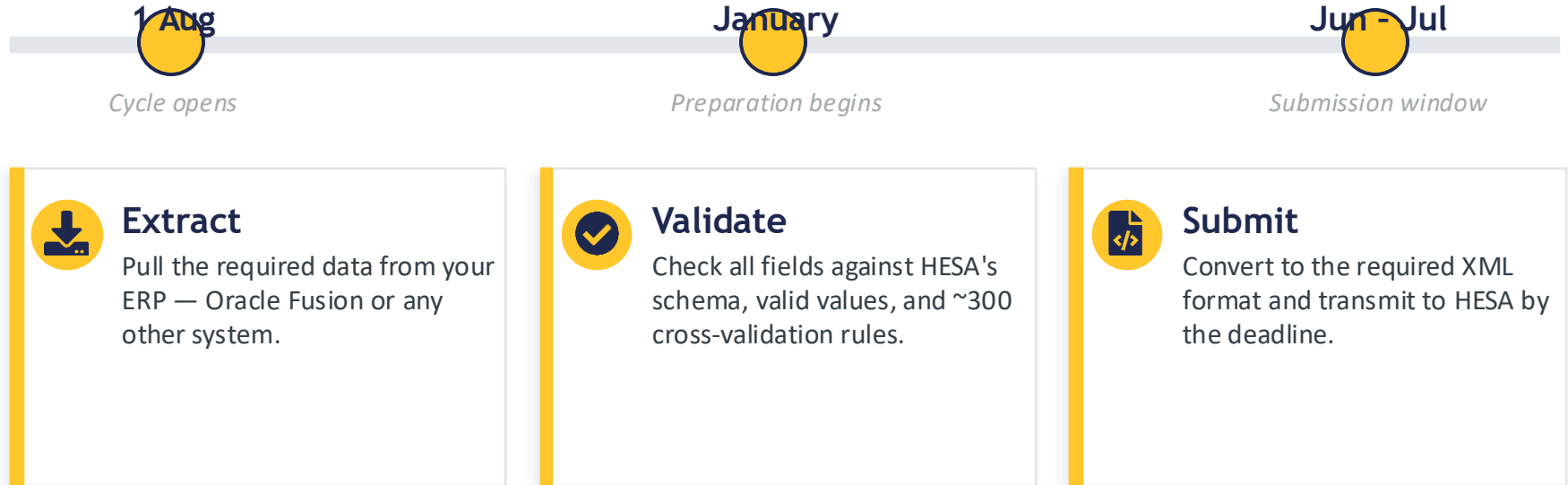
Where salary is funded by multiple grants or charities, each funding source must be reported individually — not as a single combined figure.

This is amongst the most sensitive data an organisation holds. It must be exactly right, in the right format, before submission.

This is some of the most sensitive data an organisation holds — and it has to be precisely right.

3 A July deadline that demands a January start

The HESA return covers the full academic year — for example, the 2025/26 return runs from 1 August 2025 to 31 July 2026. Submission falls in June or July, but meaningful preparation begins months earlier.



The deadline reads July. In practice, the work begins six months earlier.

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One rigid format: XML hierarchy with HESA codes — not your own values

The XML Hierarchy

Institution

unique ID · legal entities reported separately

Person

~20 fields — DOB, ethnicity, gender, disability

Contract + Governor

assignment · FTE · salary source

Activity

area of work — HR, clinical, teaching

Break the hierarchy — HESA rejects the entire file.

Codes, Not Values

Every field requires a HESA code — not the text your ERP stores. Only valid HESA codes go into the file.

"Full Time"

HESA Code

A HESA 'Contract' is what Oracle would call an 'Assignment'. Terminology differs — the mapping must be exact.

Nothing you store goes in as-is. Every single field must be translated to a HESA code first.

A lot of the effort hides in translation. Every value your ERP holds must become a HESA code before submission.

THE CHALLENGE

Where teams get stuck — and why it costs more than you'd expect

Manual processes, strict rules, and a rulebook that changes every single year.

5 Four challenges that turn HESA reporting into a multi-week ordeal



Complex Logic

Around 60 fields, each with individual rules. The underlying data is scattered across multiple systems and slow to pull together consistently.



Strict Structure

The XML hierarchy is unforgiving. A single structural error stops the entire submission — HESA will not accept a file with any hierarchy breach.



Cross-Validation

Approximately 300 validation rules check data against itself. An FTE of 1.0 flagged against a part-time contract type will fail every time.



Code Mapping

HESA will not accept your stored values. Every field must first be translated into a HESA-recognised code — and codes differ by field and year.

Any one of these is manageable. Together — across 60 fields and 300 rules — they become a problem that takes weeks to resolve.

6 The rules change every year – and your system can't always keep up

HESA revises the rules every year

Fields and valid values are added, removed, or reassigned. Codes that were correct this year may be invalid or consolidated next year. Every cycle, institutions must absorb those changes — from scratch.

Code 32 → this year

Codes 34 or 35 → next year

Oracle Cloud cannot always keep up

Some fields support changes by effective date. Others only allow corrections — which overwrite the existing record and wipe the history entirely. Rebuilding the right mappings from scratch each year is a significant and avoidable burden.

This is not a one-off setup. The rules move under you, every single year.

It is not a one-off setup. The rules move under you every year — and the work of adapting falls entirely on your team.

7

How most institutions cope today: manual, fragile, and time-consuming



Manual in Excel

Data is pulled from across the ERP into spreadsheets and reconciled by hand. Each field mapped, row by row.



Multiple Teams

HR, Finance, and IT are all pulled in simultaneously. Coordination adds delays; errors multiply across teams.



Weeks of Effort

Errors keep surfacing. Each fix triggers another validation failure. The work drags on well past when it should be done.



Missed Deadlines

July is the crunch point — and sometimes the deadline is missed altogether, with financial consequences to follow.

This is the reality many institutions live with: manual, error-prone, and it consumes the first half of the year.

THE SOLUTION

We built a better way

A purpose-built HESA reporting tool — designed around the return itself, not adapted from something else.

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The HESA Reporting Tool: configure once, submit with confidence

A working tool built specifically for the HESA staff return — not a modified template. It handles both staff and researcher records, with full support for Oracle Fusion and any other ERP system.



Configure

Set up your field mapping and valid-value translations — versioned per cycle. Download directly from HESA. No manual entry required.



Upload & Preview

Upload your four source files from the ERP. The tool maps, merges, and previews the entire submission instantly. Errors surfaced in seconds.



Generate XML

Validate, override where needed, and generate the HESA-compliant XML file — with a full audit trail and generation history.

Three areas, one place: configure the mapping, build the submission, control the access.

9 Version control built in: Draft, Live, and Submitted – with full history retained

Draft

Test and build your mapping before going live

Live

Active version in use for the current cycle

Submitted

Locked and preserved once submission is complete



Copy last year's version

Start each new cycle from the previous year's submitted version. Only update what has changed — you are done in a fraction of the time.



Sync directly from HESA

Download valid values and field definitions straight from HESA's website. The tool auto-populates — no manual configuration required.



Edit in Excel, re-upload

Export the valid-value mapping to Excel, correct in bulk, and re-upload. Use the format your team already knows.

The hard work of mapping gets done once — then reused and refined each year. No starting from scratch.

10 Upload four files. Preview your entire submission in seconds.

Four source files are all you need:



1 Institution



2 Person & Governor



3 Contract



4 Activity

The tool accepts the format provided by HESA support — including a pre-built Oracle Fusion report for faster extraction, with pre-validation checks for missing mandatory values before the file even reaches the tool.

What used to take weeks to assemble can now be reviewed in a single session — with every unmapped value clearly flagged.

Instant Preview Across Every Level



Hierarchy preview

View mapped data across Institution, Person, Governor, Contract, and Activity levels.



Filter by Staff ID

Drill into any individual record to verify the mapped values before submission.



Unmapped value alerts

The tool flags every source value without a mapping — grouped by hierarchy level, exportable for review.







Value overrides

Override any target value directly. Every manual change is captured in the full audit trail.

11 Override any value, generate your XML – with a full audit trail throughout

Full Audit Trail

-  Every manual override is logged with timestamp and user.
-  Reviewers can see exactly what was changed, when, and by whom.
-  Provides a defensible record should any submission value be queried.
-  Separates clean auto-mapping from deliberate manual corrections.

Generate XML

When all mappings are confirmed and overrides applied, the tool provides a record count summary across each hierarchy level, then generates the compliant XML file for download in under a minute.

XML Generation History

Every generated file is logged with timestamp. Previous submissions remain accessible — no need to regenerate from scratch.

Clean data in, valid XML out – with a complete record of every change made along the way.

HOW WE HELP

Take the HESA return off your plate



We know where it breaks

We have done this work ourselves. We understand the return, the edge cases, and the places institutions consistently get stuck — and we have built around them.



Tool plus support

We pair a working tool with hands-on support through preparation, validation and submission. You are not handed software and left to it.



Start with a review

A short review of where you stand today and what your return actually needs is a good first step. No commitment required.

Process improvement backed by a real tool — from people who have done the work.

Get in touch