



Welcome to the October issue of the Themis Epistle. This newsletter provides Themis users with news and updates regarding recent Themis developments, forthcoming training opportunities and hints and tips for using Themis.

Themis news and developments

Themis Upgrade

We are on track for the bi-annual Themis upgrade on Friday, 6 November. The upgrade consists of security and technology patches that ensure that we are keeping our software and database current. The upgrade is expected to be completed by Sunday night.

In this upgrade we will also implement OLM – Oracle Learning Module which will eventually replace the current Training Administration Module in Themis. The OLM implementation will impact training administrators and provide improved functionality. Please refer to the article on the OLM implementation in this Epistle for further details.

Management Information System

As reported in the August Epistle, the Management Information System (MIS) is a project initiated by Finance and Planning Group to provide management with a flexible, easy to use and powerful reporting tool. MIS retrieves data from a number of sources, including Themis and Merlin, then transforms this data in an Oracle-based data warehouse to support reporting needs.

To date, four rounds of MIS training, totally approximately 40 participants, have been delivered.

The MIS database is now being used to produce the Dashboard for the monthly University executive meeting. The Dashboard contains aggregated and non-aggregated data from Profit and Loss GL Balances, FTE, headcount and student enrolment data.

Payroll costing is now in the final stages of data verification and will be migrated to the MIS production database in the next couple of weeks. We are also finalising the formula for Costed FTE. In addition to this costing related information, we are currently building Research contracts, agreements and publications into the data warehouse and hope to finish it before the end of the year.

Themis Training Administrator – Oracle Learning Management Implementation

The Themis Training Administrator (TTA) functionality is currently being upgraded. Oracle has replaced the Oracle Training Administration (OTA) module with Oracle Learning Management (OLM). The existing Themis Training Administrator (TTA) responsibility is based upon OTA, which uses Oracle forms. The new TTA responsibility (based on OLM) has a self-service interface.

To access the new OLM module, a new responsibility has been created. This responsibility will retain the name **UOM Themis Training Administrator** and become available from the November 2009 Themis upgrade. The new OLM-based TTA responsibility will incorporate new TTA self-service functionality (for creating classes, sessions and resources as well as managing training enrolments) and the role of Catalogue Administrator (which allows users to create and edit course and offering details). The existing TTA responsibility will be renamed **UOM Themis Training Administrator-Old** and remain available until April 2010 or until an individual has been granted access to the new TTA responsibility.

Current TTA users who require access to the new responsibility will be contacted shortly and advised of training options. Access to the new TTA responsibility will only be granted on the completion of training (approx. 4hrs of lab-based training). It is anticipated that training will commence from mid-November. New users who require TTA access can register their interest in training via the email listed below. Training for new users will be approx. 6hrs and conducted in a lab from late-November.

For any queries regarding TTA Training, please contact ea-training-doco@unimelb.edu.au.

Updates from:

- Themis upgrade
- MIS
- OLM Implementation
- HR end of year deadlines
- Finance & Planning update

RDM Update

- Casual appointment
- AP business process re-engineering
- RDM-related activities

Hints & tips:

- Adding attachments to internal transactions

HR End of Year Deadlines

To ensure processing prior to the end of the year, Human Resources requests departments finalise the details for any further employment, where this is to be offered, and return the individual forms no later than **23 November 2009**. Cessation and resignations must also be forwarded to HR by this cut off date to ensure timely processing of termination payments.

Due to the RDM implementation, the 23 November deadline is critical. To ensure no disruption to payroll for individual staff, the deadline for the return of forms will be strictly followed so that processing can be undertaken within the HR Department. The only late notifications that will be processed by HR will be terminations.

Any contract renewal to be processed will be returned to the Faculty to be processed in January 2010.

Finance and Planning Group Update

Finance and Planning Group wish to advise all Divisions that due to the Melbourne Cup Day public holiday, the General Ledger month end close will be deferred to the fourth working day (Thursday, 5 November). The month end closure has been extended to allow for the receipt and inclusion of investments data from our external funds manager.

Therefore, the 2009 Forecast will open on Friday, 6 November and close at 5pm on Monday 9 November 2009. However please note that due to a previously planned system outage the forecast system will be unavailable from 3pm on the Friday and all of the weekend of the 7 and 8 November.

Departments may wish to schedule October month-end Financial Reports (FSGs) to run Thursday night (4 November), however please note a range of Financial Statements will be published in Reports Manager by 9am Monday 9 Nov 2009. These reports are:

- RT160 Departmental Trust Report by Project
- R45 Management Report Budget Summary
- RR1 ALL Projects Summary
- R44 Management Report
- R23 Budget PBC

The Project Management Summary reports will be available on Tuesday, 10 November 2009.

RDM Update

Casual Appointment Improvements

The objective of this project is to create a more efficient process for hiring casual staff which will become a local responsibility under RDM. Phase one of the project will deliver a simplified data entry screen (or template) to manage the entry of casual staff engagements. It is hoped that enhanced data entry and capture will eliminate the need for the maintenance of 'shadow systems' which currently supplement data which cannot be accommodated within Themis HR.

Work is proceeding to have this phase ready for January 2010. It is hoped that phase 2 of the project will implement a workflow function allowing the on-line approval of the hire and thereby providing visibility of the process and the elimination of the need to duplicate and retain hard copy documentation.

Update on Accounts Payable Business Process Re-Engineering

Automated process to create a supplier in Themis

This automated process will cater for the creation of both local and overseas suppliers. Data entry will occur locally, but the approval will be a common service responsibility. The new process will include a notification of approval back to the local area and will require segregation of duties in the Budget Divisions to ensure control over the databases. Development of 'create supplier' form/screens within Themis has been scoped and specified and the development work is now complete. Testing is currently being undertaken with a release to production expected for January 2010.

Credit card reconciliation

An upgrade to the iCMS software has been carried out to enable the receipt of an enhanced data file from the bank. This enhanced data will provide improved detail for those coding credit card transactions in iCMS and will, in turn, flow through to the General Ledger. The enhanced data will flow through from December 2009.

RDM Related Activities

An excel version of the *UOM Account Analysis Report*, which is the transaction report used by budget divisions, has recently been released into production. This revised report allows the full description of the transaction to be captured and can be saved as an excel report. Users will recall that the previous hard copy version captured only the first 32 characters.

Forthcoming Themis Training

The following Themis Training has been scheduled (unless otherwise indicated, enrol is via Themis Self Service > Training and Development):

Introduction to Themis Staff Self Service: contact ea-training-doco@unimelb.edu.au to register

- 26 November 2009 – 10:00am

Introduction to Themis Research: contact ea-training-doco@unimelb.edu.au to register

- 12 November 2009 – 10:00am
- 10 December 2009 – 10:00am

Introduction to Themis Supervisor Self Service:

- 3 December 2009 – 2:00pm

Themis Timekeeper:

- 10 November 2009 – 9:30am
- 1 December 2009 – 9:30am

Themis Cash Receipting:

- 16 November 2009 – 9:30am

Introduction to Themis Financials:

- 9 November 2009 – 10:00am (Overview)
- 11 November 2009 – 9:30am / 12 November 2009 – 9:30am (Transactions)
- 30 November 2009 – 10:00am (Overview)
- 2 December 2009 – 9:30am / 3 December 2009 – 9:30am (Transactions)

Themis hints and tips

Attaching a document to an internal order or chargeout

You may wish to add an attachment to your internal order or chargeout to provide additional details, or background information for a transaction.

To attach a document

- 1 Navigate to the Internal Transactions screen and enter/retrieve the desired transaction.
- 2 Click on the **Attachment** icon on the tool bar.
The Attachments screen will display.



- 3 Enter your attachment details.

Field	Action
Category	Type <i>Misc</i> and press tab to auto-populate the field, or select <i>Miscellaneous</i> from the LOV.
Data Type	Type <i>File</i> and press tab to auto-populate the field, or select <i>File</i> from the LOV. When you select <i>File</i> an upload file screen will open in a new browser window.

- 4 Click on the **Browse** button to search for and select the desired file
- 5 Once you have selected the correct file, click on the **OK** button.
You will receive a message advising that the file has been uploaded successfully.
- 6 Close the browser window to return to the Themis Attachments screen.
A message asking if the file has been uploaded successfully will display.
- 7 Click the **Yes** button to close this message and complete the attachment process.

Contributions and feedback

Please contact Marlena Axel: axelm@unimelb.edu.au with any feedback or queries, or if you have information of interest to the Themis community that you would like to contribute.

Further information

The Themis website is updated regularly with the latest information and news: www.themis.unimelb.edu.au

Themis queries may be logged online: <http://servicedesk.unimelb.edu.au/itsc/themis/>

Don't forget to check the Themis Reference cards for instructions on how to complete common tasks in Themis: www.themis.unimelb.edu.au/support/ref_cards.html

To subscribe/unsubscribe to the Themis Epistle Newsletter: <http://www.unimelb.edu.au/cgi-bin/MailServ/pmdf>