IT Project Roadshow
September 2013
Presenters

• Anne Kealley, Associate Director, Service Delivery & Engagement, ITS
• David Richardson, Associate Director, Infrastructure, ITS
• John Parry, Associate Director, Enterprise Systems & Project Delivery, ITS
• Jaya Ganasan, Associate Director, Business Services, F&BS
• Richard Robinson, ANU Online Lead
Projects to be covered today

• ANU Email
• ANU Workspace – desktop lifecycle management
• UniDoc
• Finance Travel System upgrade
• ANU Online
Key Strategic Projects – 2020 building blocks

Effective organisation: Standardisation / de-duplication
- ANU Email
- ANU Service Desk
- ANU Cloud
- ANU Workspace

Effective organisation: Service improvement / optimisation
- ANU Workspace
- ANU Email
- ANU Wireless Enhancements
- UniDoc
- StudyAt ANU Replacement
- ANU Identity & Access Management (IdAM)
- Finance Accounts Payable
- Finance Travel System
- Prospective Student Enquiry Management System

High quality infrastructure: Value add / competitive advantage
- ANU Online
- Moodle Upgrade
- TurnItIn
- Lecture Capture
- Web conferencing
- Timetabling
- ANDS Data Commons
ANU Email

• Goal: consolidation of all staff & student’s to a single, cloud based service solution using the Microsoft hosted Office365 platform to provide:
  • Productivity improvements i.e. shared calendaring
  • Robust security
  • Increased reliability
  • Greater control and administration efficiency

• Project Director – David Richardson
• Project Manager – Heath Roberts
ANU Email

The main migration is complete – 38,400 accounts are live

What’s next?

• Upgraded platform due towards the end of Nov13 (Wave15)

• Phase 2 (being scoped) but to include:
  – Review & enhance support function and email policies
  – Decommissioning redundant services
  – Collaboration and enhanced utilization

Project Director:   David Richardson
Project Manager:  Heath Roberts
ANU Workspace

Goals/Benefits:

- More efficient end-to-end PC lifecycle management
- Faster deployment of appropriate, standardised hardware and software to ANU staff and students i.e. the end user
- More efficient fleet management – deployment, relocation, addition, change, recovery, enhanced image management
- Improved IT security through up to date application patching
- Reduced administrative and IT support costs through standardisation and simplified process for procurement and provision of end-user computing support.

- Project Director: Anne Kealley
- Project Manager: Tony Davis
ANU Workspace

What you can expect to see:

- Portal with hardware options for desktops, laptops, x86 tablets, monitors
- Standard operating image for Windows, Macintosh and Linux
- App store for ANU approved applications
- Move to Windows 8.1 for Windows machines
- Move to Office 2013
- Improved IT asset management
- Exemption policy for special purpose use (<20%)
ANU Workspace

What is happening at the moment:
Project featured at the ANU IT Forum on Monday 23 September
Project governance:
• Project Steering Committee
• Project Working Group
• Project Advisory Group
Completed a Project risk management workshop
Working on Statements of Work for the project deliverables

Down the track:
Training – online modules, tip sheets

Project web site:
Goals/Benefits:

• Implement an electronic document and records management system across the ANU
• Increased information management efficiency

• Project Director: John Parry
• Project Manager: Tony Davis
UniDoc – Phase 1

Pilot to develop Policy website with electronic approval workflow

Built using the Oracle WebCenter Suite

Has been live since end of March 2013

Support arrangements with external vendor almost complete
UniDoc – Phase 2

Phase 2 now underway with external partner – Team Informatics

TI – Subject matter experts with considerable experience implementing “Content in Box” configured to ANU requirements, including Business Classification Scheme

Requirements gathering and digitisation Strategy currently being finalised with key Stakeholders.
UniDoc – Phase 2 (cont)

Next Steps:

Finalisation of configuration and testing

Digitisation of information

Progressive rollout of business units across ANU

Timetable to be determined

Project web site:
Travel & Expense System

- End to end process on a single platform
- Electronic enabled workflow process
- Elimination of paper based process on per-diem, advances, reimbursement, risk assessment and travel diaries.
- On demand reports
  - Duty of care reporting
  - Executive reporting on travel costing
Travel and Expense System

What you can expect to see:

Outcomes: End to End Travel Request – Approval – Expense Request – Expense Payment – Expense Reconciliation System

Outputs: Electronic Workflow enabled Request, Approvals and Acquittals

Impact: Significant Processing Efficiencies and Value Added Services.
Proposed Business Process

**Step 1**
Applicant  
Initial Travel Request
- Complete Travel Information, Travel Plan, Risk Assessment, and Travel Budget
- Attach relevant forms (OSP, FBT, Advances)
- Complete checklist once returning from travel (Travel diary, Reimbursement, FBT)

**Step 2**
Immediate Supervisor  
Endorsement on Travel Request
- Endorse travel request
- Request for more information from the applicant
- Endorsement can be done through collaborative email

**Step 3**
Travel Administrator  
Validate Travel Request
- Validate for correctness and completeness of travel request
- Amend or update travel information as required
- Change and re-route to different supervisor/Approver for endorsement/approval
- Request for more information from the applicant

**Step 4**
1st Approver  
Domestic Travel Request Approval
- Approve/reject domestic travel
- Approval can be done through collaborative email

**Step 5**
2nd Approver  
International Travel Request Approval
- Approve/reject International travel
- Approval can be done through collaborative email
Travel Request Entry

Travel Information

Submit Travel Request for trip: CPA Congress London

<table>
<thead>
<tr>
<th>Travel Information</th>
<th>Travel Plan</th>
<th>Risk Assessment</th>
<th>Travel Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>U3357035</td>
<td></td>
<td></td>
</tr>
<tr>
<td>University ID</td>
<td>U3105034</td>
<td></td>
<td></td>
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<tr>
<td>Relationship to ANU</td>
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<td></td>
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</tr>
<tr>
<td>Supervisor</td>
<td>U3357035</td>
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College/Division: ANU College of Asia and the Pacific
School/Faculty: Australian Postgraduate Awards

Organized By: Travel Administrator
* A Name for This Trip: CPA Congress London

Authorization ID: 1865
* Travel Start: 09-Sep-2013
* Travel End: 16-Sep-2013
Number of Nights: 7

Professional or Academic Staff

Do you need to make arrangements to cover teaching (exclude examination period), supervision or administrative responsibilities?

Please Provide Details

Require covering for documentation review.

Purpose of Travel

Purpose: Conference
Details: CPA Congress

Attachment Checklist

Comments

29-Aug-2013 11:25 U3357035
Conference Agenda Attached

Attachments

Name: CPA Congress
Updated By: U3357035
Date Updated: 29/08/2013
## Travel Request Entry

### Travel Plan

#### Submit Travel Request for trip: CPA Congress London

<table>
<thead>
<tr>
<th>Travel Information</th>
<th>Travel Plan</th>
<th>Risk Assessment</th>
<th>Travel Budget</th>
</tr>
</thead>
</table>

#### Travel Alerts

- **Level 2: Exercise normal safety precautions**
- Overall Travel Area: INTERNATIONAL

#### Travel Segments

- **Segment Start Date**: 11-Sep-2013
- **Segment End Date**: 14-Sep-2013
- **Type**: Business
- **Country**: United Kingdom
- **City/Region**: London
- **Phone**: 0407302365
- **Email**: [item=xU5105054@anu.edu.au]

*Preferred way of contact in time of emergency: Phone □ Email □*

#### Your Itinerary

<table>
<thead>
<tr>
<th>Arrival Date</th>
<th>Departure Date</th>
<th>Travel Type</th>
<th>Destination Country</th>
<th>Destination City</th>
<th>Phone</th>
<th>Email</th>
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<tr>
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<td>14-Sep-2013</td>
<td>Business</td>
<td>United Kingdom</td>
<td>London</td>
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<td></td>
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<tr>
<td>09-Sep-2013</td>
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#### Attachment Checklist

- **29-Aug-2013 11:25**: U3557035
  - Conference Agenda Attached

#### Attachments

- **Name**: CPA Congress
  - **Updated By**: 15-Sep-2013
  - **Date Updated**: 15-Sep-2013
Travel Request Entry

Risk Assessment

Submit Travel Request for trip: CPA Congress London

Instruction Notes
Risk Assessment is mandatory for applicants traveling to fieldwork, traveling to High Risk Destination(s) or any other risks are involved. If you have not yet complete a risk assessment, and believe there is a need to do so, please save your travel request and complete your risk assessment in the ANU Risk Assessment System.

ANU Policy and Procedure on Travel to High Risk Destinations
ANU Policy and Procedure on Risk Assessment

* Have you completed a Risk Assessment in the ANU Risk Assessment System?
  - Yes
  - No

My Assessment Reference No. [REPLACE WITH NUMBER] Please attach the Risk Assessment Result.

I certify that I have registered my travel with DFAT Smart Traveller
Please continue to review and monitor the DFAT Smart Traveller's Travel Advisories for possible changes to your destination's risk category.

Attachment Checklist

29-Aug-2013 11:29   U357035
Conference Agenda Attached

Attachments

<table>
<thead>
<tr>
<th>Name</th>
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<tr>
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# Travel Request Entry

## Travel Budget

### Submit Travel Request for trip: CPA Congress London

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<thead>
<tr>
<th>Type</th>
<th>Amount</th>
<th>Payment Type</th>
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</thead>
<tbody>
<tr>
<td>Miscellaneous</td>
<td>£500.00</td>
<td>Per Diem (except for P01)</td>
</tr>
<tr>
<td>Accommodation</td>
<td>£3,858.00</td>
<td>Cash Advance (except for P01)</td>
</tr>
<tr>
<td>Airfare - Intern</td>
<td>£1,990.00</td>
<td>ANU Purchase Card</td>
</tr>
<tr>
<td>Conference - Hotel</td>
<td>£230.00</td>
<td>ANU Purchase Card</td>
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<td></td>
<td>£3,305.00</td>
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### Budget Code

<table>
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<th>Project ID</th>
<th>Split</th>
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<td>241C03</td>
<td>01</td>
<td>35</td>
</tr>
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</table>

### Attachment Checklist

- Name: CPA Congress
  - Updated By: U3357035
  - Date Updated: 29/09/2013

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29-Aug-2013 11:25  U3357035
Conference Agenda Attached
Approval by Collaborative Email

- Approval can be done through either collaborative email or via logon to system.
- Collaborative email has an at-a-glance (tab free) layout with approval/reject function buttons.
Update to Travel Expenses in PeopleSoft Financials

Create Travel Authorization
Travel Authorization Entry
Trevor Langtry

*General Information*
- **Description:** CPA Congress London
- **Business Purpose:** Work
- **Default Location:** Australia
- **Date From:** 09/09/2013
- **Date To:** 16/09/2013

**Comment:** Conference Travel from 09/09/2013 to 16/09/2013

**Accounting Defaults**

**Details**

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<tr>
<th>Select</th>
<th>Expense Type</th>
<th>Date</th>
<th>Amount</th>
<th>Currency</th>
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<tr>
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<td>Miscellaneous - Travel</td>
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<td>Cash</td>
<td>Travel Reque</td>
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<td>Accommodation - Internat</td>
<td>09/09/2013</td>
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<td>AUD</td>
<td>Cash</td>
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<td></td>
<td>AIRLINES - INTERNATION</td>
<td>09/09/2013</td>
<td>680.00</td>
<td>AUD</td>
<td>Purchase C</td>
<td>Travel Reque</td>
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<tr>
<td></td>
<td>Conference - Internatti</td>
<td>09/09/2013</td>
<td>230.00</td>
<td>AUD</td>
<td>Purchase C</td>
<td>Travel Reque</td>
</tr>
</tbody>
</table>

**Totals**
- **Authorized Amount:** 3,305.00 AUD

**More Options:**

**Update Totals**
Integration through Web Services

- PeopleSoft Financials
  - GL validation (Fund Department Project)
  - ANU Tree Structure
  - Travel Administrators
- PeopleSoft HR/Campus Solutions
  - Personal Data (Relationship to ANU, College, Program Plan, Emergency contact)
  - Approval delegation
  - Staff/Students supervisor
- LDAP
  - Log on credentials
- DFAT- Smart Traveller
  - Country Risk Level
Travel and Expense System

What is happening at the moment:

• Testing commence in early September
• Pilot move into CAP

Down the track:

– In built Travel Diary and acquittals
– In built FBT calculator (pre and post travel) as compared to current manual form attachment
– In built Risk Assessment and approval workflow
- HR system pull (annual leave, travel dates and transfer of delegation authority)
ANU Online
Goals/Benefits:
• Provides lecturers and students with a campus-wide learning platform to manage key aspects of the teaching and learning process.
• Enable ANU to achieve global leadership in the provision of an outstanding educational experience via the use of transformational educational technologies.
• Allows additional tools to be made available to the university community:
  – Ethical Treatment of Academic Materials
  – Lecture Capture
  – Content Repository for Education
  – Learning Analytics
  – Community Creation and Sustainability

Project Director: Richard Robinson
Project Manager: Tristan Hogg
ANU Online: What you can expect to see

Analytics for Education

Community Creation
What is happening at the moment:

2013

• Moodle 2.5 Upgrade – 9-10 December
• Turnitin – feasibility & scoping
• Echo360 – feasibility & scoping

Project web site:
online.anu.edu.au

For further information:
tristan.hogg@anu.edu.au
richard.robinson@anu.edu.au
Next session

Thursday 24 October
Haydon-Allen Lecture Theatre (The Tank), Building 23
1.10 – 1.50pm

Featured projects to be determined.
Further information

Information on ITS strategic projects is available at http://itservices.anu.edu.au/projects/updates/

Contact Us

Project Directors, Project Managers, your local IT Manager or

Anne Kealley

(Associate Director, Service Delivery & Engagement)
ad.engagement.its@anu.edu.au