

Themis Epistle

February 2009, Issue 9



Inside this issue

Welcome to the February 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

Once again, we are gearing up for one of our bi-annual Themis upgrades. The upgrade, planned for the 1st weekend of April, will consist of Oracle security patches, an Oracle database upgrade and HR patches which are pre-requisites for the end-of-year legislative patches that will be in place by end of June, to take effect on 1 July.

Since the Themis hardware upgrade last year, we repeat the end-user benchmark performance testing at every upgrade to ensure that Themis performance is not compromised. A number of users both on and off campus have volunteered to participate in this testing, but the more participants involved the better the outcome we will have.

If you are interested, and can spare ½ - 1 hour during any of the following windows please e-mail axelm@unimelb.edu.au with your name, location and preferred day. We will send out instructions for the testing during the week commencing 2 March.

Performance testing windows:

- Thursday 12 March 2pm – 4pm
- Monday 16 March 1 pm – 3pm
- Tuesday 17 March 10am – 12pm
- Wednesday 18 March 3pm – 5pm

Themis Research – Publications

A new statistics report is now available in Themis Publications. The report enables the creation of publication statistics, for all categories of publications including DEEWR and non-DEEWR categories.

The report can provide publication numbers for faculties, departments and authors and multiple years can be selected for comparison. The main feature of the report is that it provides DEEWR weighting scores for publications in a specified period. The example below shows a snapshot of a department's publications for 2008. The columns show the total number of publications for each author plus the total weighting for all their publications.

Publication Summary Statistics By Department

Category: C1 - Journal Articles Refereed
Year: 2008

Author	Draft	Submitted	Verified*	Certified*	Approved*	Finalised	Total	Weighted Publication Score*
Alley, Mr Kerwyn Graham	0	1	0	0	0	0	1	0.00
Barnard, Amanda	0	0	3	0	0	0	3	1.60
Bird, Dr Damian	0	0	1	0	0	0	1	0.20
Bojarova, Dr Pavla	0	0	1	0	0	0	1	0.11
Boskovic, Dr Colette	0	1	0	0	0	0	1	0.00
Burrell, Mr Geoffrey Lewis	0	1	0	0	0	0	1	0.00
Chen, Mr Xing Qiang	0	0	1	0	0	0	1	0.20
Denehy, Ms Emma Louise	0	0	1	0	0	0	1	0.11
Donnelly, Dr Paul Stephen	0	0	2	0	0	0	2	0.45
Dunlop, Dr Noel Francis	0	1	0	0	0	0	1	0.00

You can access the Publications Statistics report through the Advanced Publications Reporting module in Themis. Please contact Paul Quilty (MRO Publications Coordinator) on 8344 2070 or pquilty@unimelb.edu.au if you have any queries about the report.

Updates from:

- Themis Upgrade
- New Themis Publications report
- Improvements to Oracle Time & Labour module

Training & documentation:

- Introduction to Themis Finance for senior managers
- Forthcoming Themis training

Hints and tips:

- Searching for a receipt
- Using workflow to export report results

Oracle Time and Labour Module – Efficiency Improvements

A Responsible Division Management (RDM) project is currently underway to improve the efficiency of administering payments for casual staff. The issues with Oracle Time & Labour (OTL) have been identified as:

- Staff not being paid, or being paid inaccurately
- Inefficient screen used in timecard entry (both Self Service and Timekeeper)
- Inefficient process for checking timecard approvals
- Need for guidelines, training and support

The project has identified some short-term solutions and work is currently underway to provide:

- A new report accessible by Timekeepers and other departmental administrators that enables them to review the status of staff timecards, including those not approved and who is the nominated approver.
- A link from the Self Service timecard entry screen to On-line Help for assistance in completing the timecard.

The project is also looking at the longer term solutions for potentially modifying the approval workflow and for simplifying the timecard entry process. This project is constrained by the standard Oracle infrastructure as to what changes can be made. As the constraints become clear and options can be determined, the project will provide more details about what further improvements are planned for OTL.

Documentation and Training Services update

The Documentation and Training Services team are currently in the process of developing a new Themis course - *Themis Financials for Senior Executives and Managers*.

Course Overview

This course aims to introduce senior executives and managers to basic finance concepts at the University of Melbourne, including the chart of accounts, basic Themis access, navigation, common processes and support resources, reporting overview and approving requirements.

Participants will also gain an overview of the main areas of financial transactions, including the payables, receivables, internal transactions and purchasing modules.

Intended Audience

The course is designed for senior executives and managers, new to the University or their positions, who require access to Themis Financials for reporting and approving purposes.

This course is recommended (but not compulsory) for those requiring the UOM GL Inquiry and UOM Report Manager responsibilities in Themis. In addition, the following training offered by Financial Operations is recommended as a learning pathway: *Reporting Masterclass* and *Advanced Themis Reporting Inquiries and Salary Analysis*.

Structure:

1.5 hrs total (1 x 1.5hr session delivered one-on-one or as negotiated)

Important Note: This course does not grant access to UOM Manager Dept/Faculty or UOM Data Entry responsibilities. Managers who require direct access to Themis Financials transactions (via the UOM Manager Dept/Faculty responsibility) must enrol in the Introduction to Themis Financials Overview and Transaction training.

If you wish to participate in this training, or discuss whether the training is appropriate for your needs, please contact ea-training-doco@unimelb.edu.au.

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

- 11 March 2009 – 9:30am
- 23 April 2009 – 1:30pm

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

- 11 March 2009 – 11:00am
- 23 April 2009 – 3:00pm

Introduction to Themis Supervisor Self Service:

- 25 March 2009 – 1:30pm

Themis Timekeeper:

- 07 April 2009 – 9:30am

Themis Cash Receipting:

- 16 March 2009 – 9:30am
- 27 April 2009 – 9:30am

Grants and Contracts for Administrators

- 1 April 2009 – 10:00am (Submission and Proposals – Grants)
- 3 April 2009 – 9.30am (Agreements)

Introduction to Themis Financials

- 8 April 2009 – 10:00am (Overview)
- 8 April 2009 – 1:00pm / 9 April 2009 – 9:30am (Transactions)

Themis hints and tips

Searching for a Receipt

If you need to retrieve a receipt you have entered in Themis, you may perform a search. The main search criteria are Receipt Number, From/To Dates and Cashier (user/department). However, you are also able to use the Trans Type/Tran Ref fields as well as the Pay Type/Pay Ref fields to search for specific transaction or payment details contained in the receipt.

Receipt No	<input type="text"/>	Trans Status	<input type="text"/>	Pay Type	<input type="text"/>
From Date	<input type="text"/>	Trans Type	<input type="text"/>	Pay Ref 1	<input type="text"/>
To Date	<input type="text"/>	Tran Ref 1	<input type="text"/>	Pay Ref 2	<input type="text"/>
Cashier	<input type="text"/>	Tran Ref 2	<input type="text"/>	Pay Ref 3	<input type="text"/>
Receipt Amount	<input type="text"/>	Tran Ref 3	<input type="text"/>	Pay Ref 4	<input type="text"/>

For example: you may select the type of transaction from the list of values in the Trans Type field (e.g.: Conference Registration) and enter data in the Tran Ref fields to search for a particular customer name or an address or country, etc.

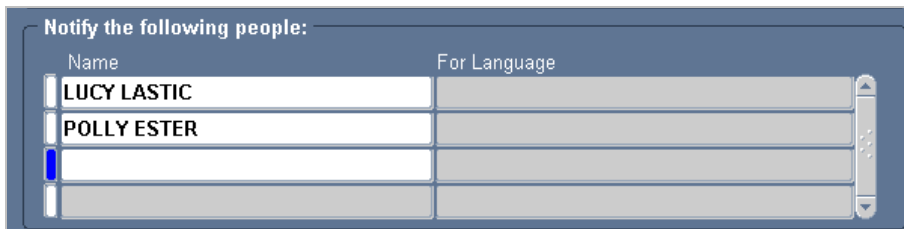
Alternatively, you may use the Pay Ref fields to search for a specific type of credit card (e.g.: VISA) and credit card name or number. **Note:** the payment reference fields available will depend on the payment type selected (e.g.: if you select credit card in the Pay Type field, the pay ref fields will change to Card Type, Card Name, Card Number, Expiry Date, and Deposit Number).

For further details refer to the *Searching for a payment receipt* reference card.

Using Workflow to Export Report Results

Themis enables you to request a worklist notification upon completion of your report. This notification will include a hyperlink to the report results and enable you to open them in Excel format.

- 1 Navigate to the Report/Requests function and select the report you wish to run.
You will need to enter the report parameters – this will be dependent on the report you have selected.
- 2 If required, click on the **Schedule** button located in the *At these Times* section and enter appropriate details.
For further details refer to the *Scheduling a report* reference card.
- 3 Click on the **Options** button, located in the *Upon Completion* section of the Submit Requests screen.
The Upon Completion screen will display.
- 4 Enter your name in the Name field in the *Notify the following people* section of the screen.
Note: this should be your name as recorded in Themis, not your username.

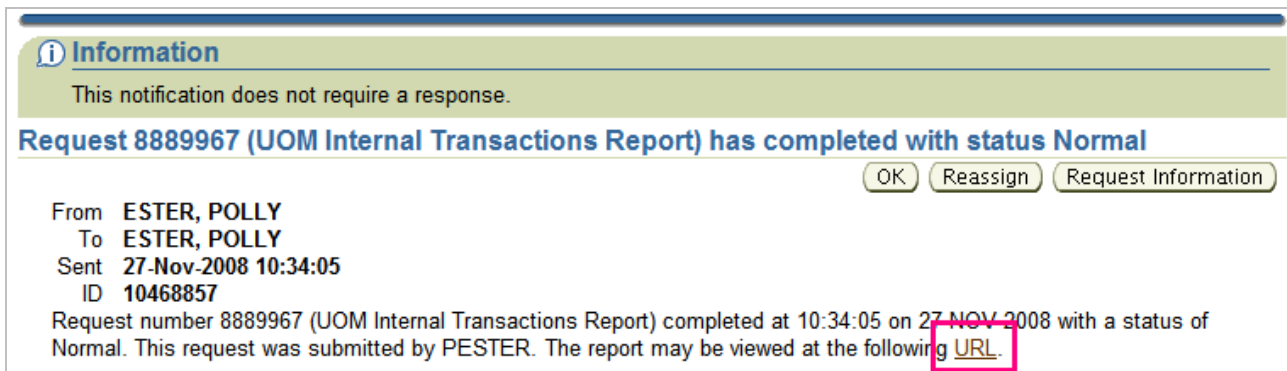


Name	For Language
LUCY LASTIC	
POLLY ESTER	

- 5 Click on the **Submit** button to run the report immediately or queue it for the scheduled run time.
Once the report has completed a notification will be sent to the Themis worklist of the staff specified in the *Notify* section of the report request screen.

Worklist		
From	Subject	Sent
ESTER, POLLY	Request 8889967 (UOM Internal Transactions Report) has completed with status Normal	27-Nov-2008
LASTIC, LUCY	UOM Class enrollment for LASTIC. MS LUCY requires approval	05-Aug-2008

- 6 Click on the notification hyperlink to view the notification details.



Information
This notification does not require a response.

Request 8889967 (UOM Internal Transactions Report) has completed with status Normal

OK Reassign Request Information

From: ESTER, POLLY
To: ESTER, POLLY
Sent: 27-Nov-2008 10:34:05
ID: 10468857

Request number 8889967 (UOM Internal Transactions Report) completed at 10:34:05 on 27 NOV 2008 with a status of Normal. This request was submitted by PESTER. The report may be viewed at the following **URL**.

- 7 Click on the **URL** hyperlink in the notification to access the report results in Excel format.
You may then manipulate, print and/or save these results as desired.

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>