TRIDANT
data driving decision making

Value

Current
Spreadsheets for reporting and analysis

Enterprise resource planning budgeting

Isolated applications

Disparate data

Automate & Model
Driver-based planning and forecasting

Near-real-time analysis

Scenario analytics

Narrative reporting

Dashboards and management reports

Integrate & Accelerate
Financial and operational performance management

Rolling forecasts

Key performance indicators (KPIs) and scorecards

Workforce Planning

Elevate with Predictive
Load Modelling

Student retention predictions

Text Analytics

Decision Optimisation

Drive Analytic Innovation
New analytic modeling and enhancement

Activity Based Costing

Better Outcomes
Information as a competitive differentiator

Cognitive

Today's Challenge

First Steps

Span the Enterprise

Forecasting Success

Analytic Agility

Realise Performance Potential

Tridant's Roadmap for Forward-Thinking Universities.

Maturity

tridant.com   in Tridant   @TridantAus   @TridantAsia

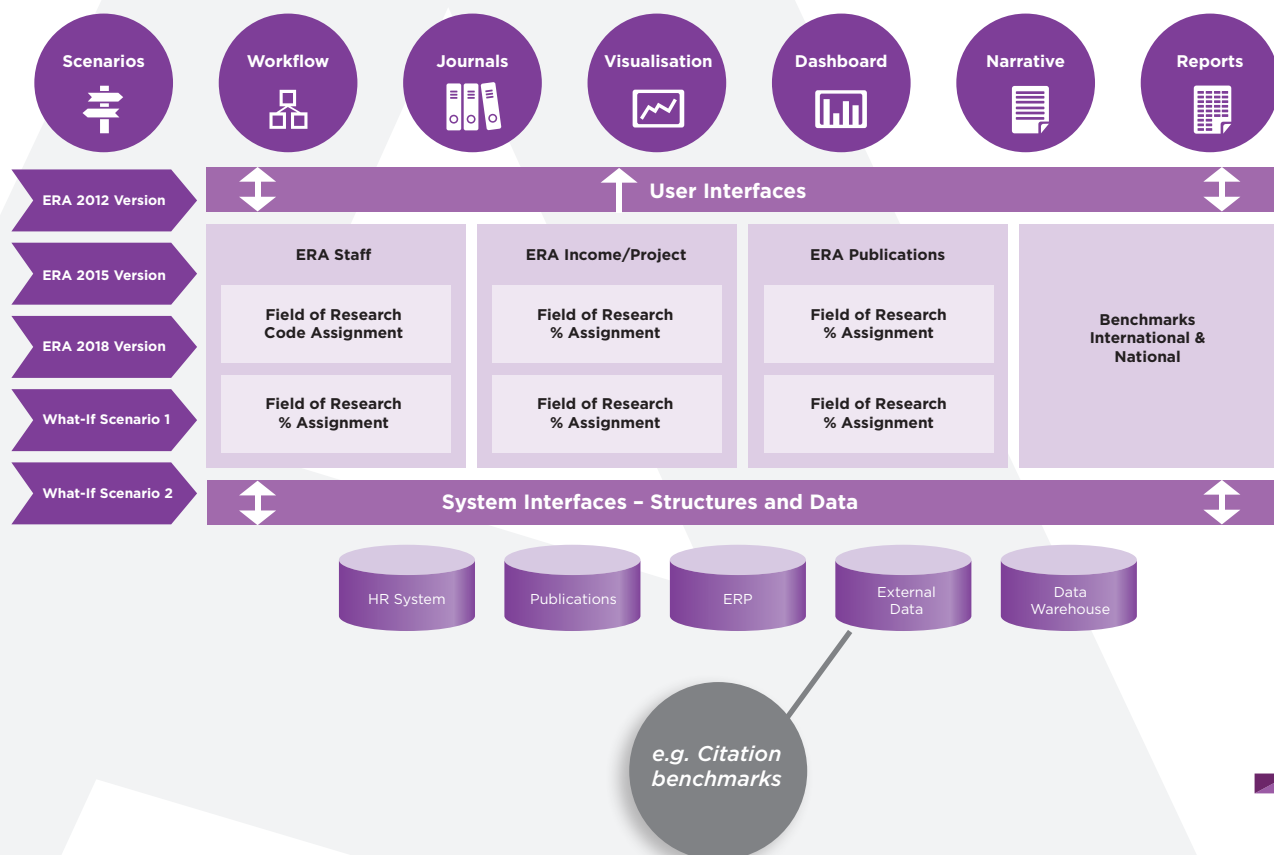# Tridant Solution for University ERA Modelling

ERA is a comprehensive quality evaluation of all research produced in Australian universities against national and international benchmarks. The ratings are determined and moderated by the Australian Research Council (ARC), drawn from Australia and overseas. The unit of evaluation is broadly defined as the Field of Research (FoR) based on the Australia and New Zealand Standard Classification (ANZSRC).

ERA is based on expert review informed by a range of indicators. The indicators used in ERA include a range of metrics such as citation profiles which are common to disciplines in the natural sciences, and peer review of a sample of research outputs which is more broadly common in the humanities and social sciences.

Through ERA, universities want to be able to showcase the fields of research in which they specialise. Optimisation of the ERA FoR is permitted under the ARC ERA guidelines and this generally involves allocating FoRs to staff, outputs, income and other measures. Managing these permutations across multiple measures, disciplines and areas of strength can become an Excel nightmare.

Typically you need to run numerous models simultaneously and dynamically model based off people feedback. Excel will not be able to cope with this 'What If' need and will also lack any audit trail or security.

Tridant's 'Fast Start' approach to implementing an ERA Model gives you all the agility you need to keep pace with changes in higher education.

Tridant's Solution for University ERA Modelling includes:

- Allow staff members to view, enter ERA information and do scenario modelling Online

- Create what-if scenarios quickly and compare them against each other

- Load your data via copy/paste into templates or automate from your source systems

- Increase speed of processes and input from your users

- Enhance compliance with ARC ERA specifications and guidelines

- Create a system that can be maintained by your internal team

- Allow other staff members to view, enter ERA information and do scenario modelling

- Allow reporting and adhoc analysis

- Compare ERA with Benchmark data

- An Admin Console with defined step by step guides

- Optional within the solution is predefined Dashboards and visualisations

Diagram

Top row (circles): Scenarios | Workflow | Journals | Visualisation | Dashboard | Narrative | Reports

Left column (arrows): ERA 2012 Version | ERA 2015 Version | ERA 2018 Version | What-If Scenario 1 | What-If Scenario 2

User Interfaces

ERA Staff	ERA Income/Project	ERA Publications	Benchmarks International & National
Field of Research Code Assignment	Field of Research % Assignment	Field of Research % Assignment	
Field of Research % Assignment	Field of Research % Assignment	Field of Research % Assignment	

System Interfaces – Structures and Data

Data sources (cylinders): HR System | Publications | ERP | External Data | Data Warehouse

e.g. Citation benchmarks

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Tridant Solution for University GL Planning

To meet the challenges of an increasingly competitive education sector, Universities need to control their operational spend.

Universities can enable data-driven decision-making based on greater insight into financials via the Tridant Solution for GL Planning.

The pressure on universities to think and operate more like businesses is increasing, so its no longer acceptable to take months and months to calculate an annual budget. Universities need to be more agile and be able to create budgets and forecasts in weeks, not months.

Universities can shrink their planning cycles by moving away from Excel where there is also no security or workflow and instead move to a real-time, planning and dynamic reporting solution.

Budgeting and forecasting does not need to be a hard exercise so the solution makes it easy for users to 'seed' their budgets with data from any prior version at any level e.g. pre populate your expense budget for next year with last years budget and maybe take the current forecast as a starting point for next years revenue budget.

Setting of KPI indicators as a central finance team allows you to give guidance to users as to expectations and indicators if their budget submissions will be approved.

The solution can be deploy in the cloud or on premise depending on your needs.

Tridant's 'Fast Start' approach to implementing GL Planning gives you all the templates needed.

graphical dashboards illustrate your key business performance measures.

Users can continue to access and manipulate data in their everyday tools.

MS Office

Visualisation

Dashboard

Narrative

Reports

Actual					
Budget	**User Interfaces**				
	Data Seed your version with any other version at any level	Instant rollup via Org hierarchy e.g. School Department Faculty / Division	Top Down data entry at Annual or Monthly level	By Segment — Discretionary vs Tied	Financial KPIs Target Setting
Forecasts	**Security**				
What-If Scenario 1	**Workflow**				
What-If Scenario 2	**System Interfaces – Structures and Data**				

ERP

Other (CSV, TXT)

Data Warehouse

The power of integrated performance management lies in real time comparison of planning and forecast data against actuals, for rapid decision making.

Integrated performance management allows you to easily incorporate information from other systems.

Your key business systems provide essential input data. With import from any data format, there's no need to change or replicate any existing systems.

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Tridant Solution for University Costing and Pricing Development

Australia universities normally finance a proportion of its research with grants funding received from various organisations such as Australian Commonwealth Government, International Institutions, large commercial organisations. Each of these entities has different
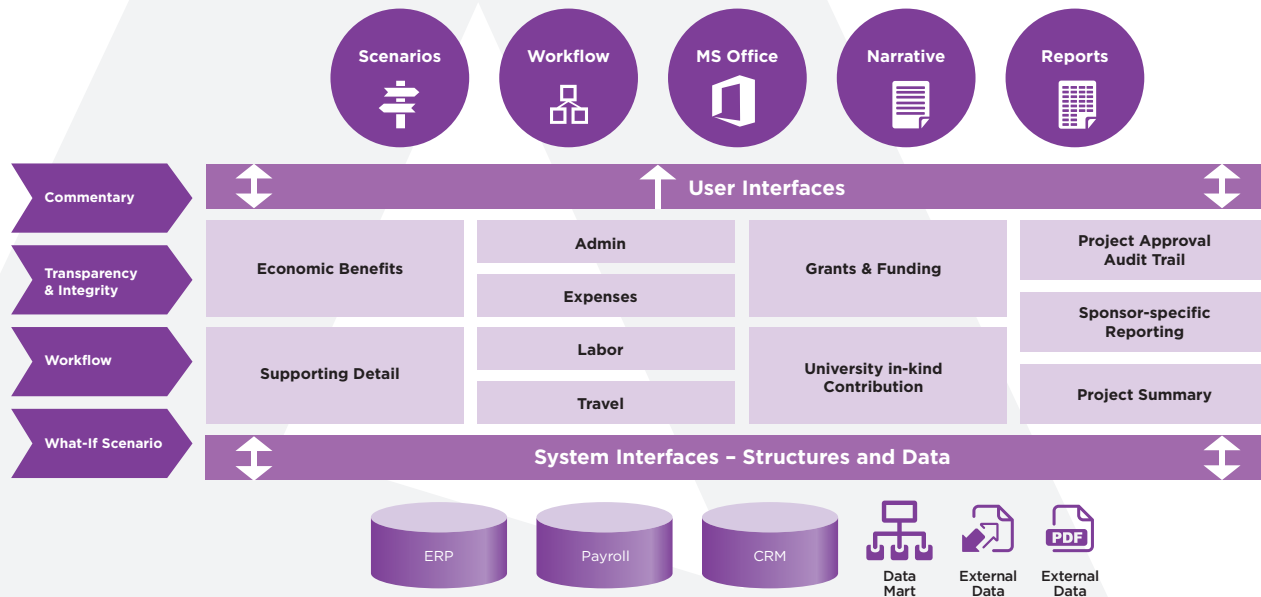
budgeting rules and definitions, as well as what they are willing to finance through the grant funding agreements.

The Costing and Pricing Development solution has been developed based on practical experience to establish cost accounting

principles and a formal cost recovery policy to improve consistency, transparency and accountability in the context of research.

The solution will provide a consistent and efficient platform that universities can set cost and pricing principles which are acceptable and approved for use in research budgets through the application, acceptance and post award stages of research projects.

Tridant's 'Fast Start' approach to gives you all the templates needed.

Diagram

Scenarios | Workflow | MS Office | Narrative | Reports

Commentary
Transparency & Integrity
Workflow
What-If Scenario

User Interfaces

Economic Benefits	Admin	Grants & Funding	Project Approval Audit Trail
	Expenses		Sponsor-specific Reporting
Supporting Detail	Labor	University in-kind Contribution	
	Travel		Project Summary

System Interfaces – Structures and Data

ERP | Payroll | CRM | Data Mart | External Data | External Data (PDF)

Sidebar

Within Solution for University Costing and Pricing Development:

- The "Workflow" modules is designed to capture key personnel details at each approval points and conditions to be pushed into next stage. Email alert will be triggered if required conditions are met.

- The "Project List" template provides all projects owned or the user have access to.

- The "Project Overview" template provides basic information for a project.

- The various "Project Plan" templates are designed to capture effective costing data and managing the transaction process in accordance project information and costs entry.

- The "Project Travel" template captures travel requirement estimation and calculate travel costs based on pre-configured routine and allowance card.

- The "Project Resource Allocation" template is designed to capture human resources monthly/yearly personnel phrasing and associated costs calculation.

Integrate with your key Source systems i.e.

- ERP
- Payroll
- CRM

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Test drive the blue print in a cloud based deployment.
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Tridant Solution for University Faculty Performance Reporting

The Tridant Solution for University Faculty Performance Reporting includes the collection of data and commentary from the faculties via a workflow interface; thus facilitating annual performance review meetings.

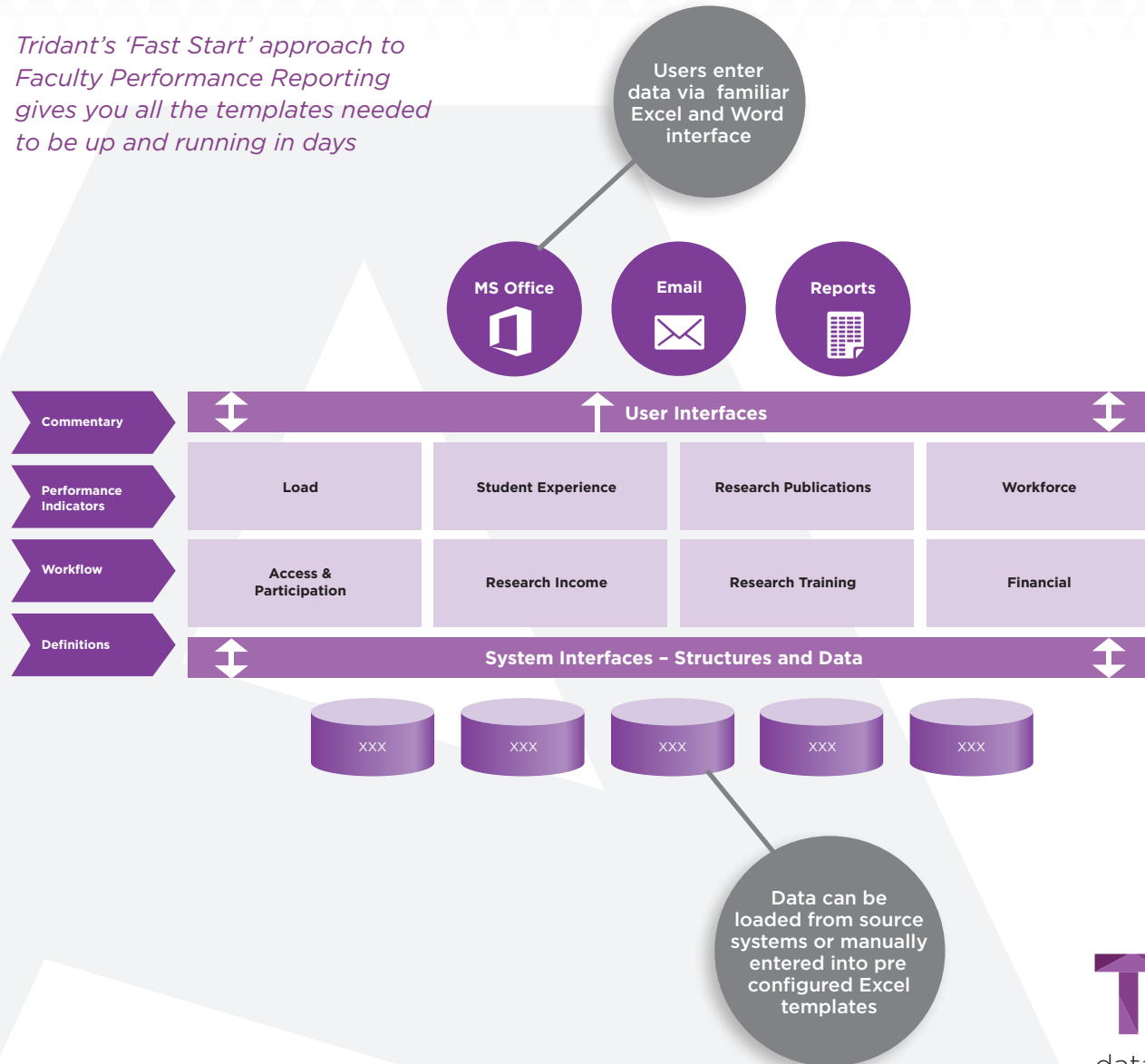The predefined template allows faculties to report their progress against their plans.

Faculties performance data can be loaded automatically from source systems or manually entered. The evaluation scorecard format displays critical indicators of faculty performance.

The Report is structured in three sections (Learning & Teaching, Research & Research Training and Enabling & Supporting) each with strategic themes mirroring a Business Plan structure. Each strategic theme will have a page of performance data and a page of performance analysis and evaluation.

Each strategic theme will have 4-6 critical quantitative performance indicators graphically presented on a single page

Having Faculties document their analysis and evaluation reinforces the Accountability Cycle and strengthens planning so it considers past performance and incorporates continuous improvement principles

Tridant's 'Fast Start' approach to Faculty Performance Reporting gives you all the templates needed to be up and running in days

Users enter data via familiar Excel and Word interface

MS Office

Email

Reports

Commentary

Performance Indicators

Workflow

Definitions

User Interfaces

| Load | Student Experience | Research Publications | Workforce |
| Access & Participation | Research Income | Research Training | Financial |

System Interfaces – Structures and Data

xxx xxx xxx xxx xxx

Data can be loaded from source systems or manually entered into pre configured Excel templates

The Tridant Solution for University Faculty Performance Reporting includes:

- Structured in three sections (Learning & Teaching, Research & Research Training and Enabling & Supporting)

- 4-6 critical quantitative performance indicators graphically presented on a single page

- Commentary page for each strategic theme to allow capture of context, performance and plans

- Each indicator has the option for a rolling 4 years of data at a School level for each Faculty

- Ensures consistent and transparent documentation

- In built workflow tracks progress and encourages accountability

- The solution uses Microsoft Word and Excel at its core so User adoption is high and training costs are low

- Security profiles so that Faculties only see their data or can only edit their section of a report

- Dashboards showing at a glance who has done what, where and when

Test drive the blue print in a cloud based deployment.
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Tridant Solution for University Load Planning & Reporting

The Higher Education industry in Australia has been under substantial examination and reform. Changes to government policy, including deregulation, is likely to have an impact on the industry in the years to come.

A critical factor that needs to be understood by Higher Education providers is the portion of the industry considered as export. Valued at about $15 billion, is ranked as the 4th exporting industry in Australia and strong growth in the number of international students is expected to continue in the near future.

Using Tridant's Load Planning and Reporting solution, EFTSL planning based on historical data by faculty, course (Inside, Outside & Combined courses), and split by continuing and commencing load can be model correctly.
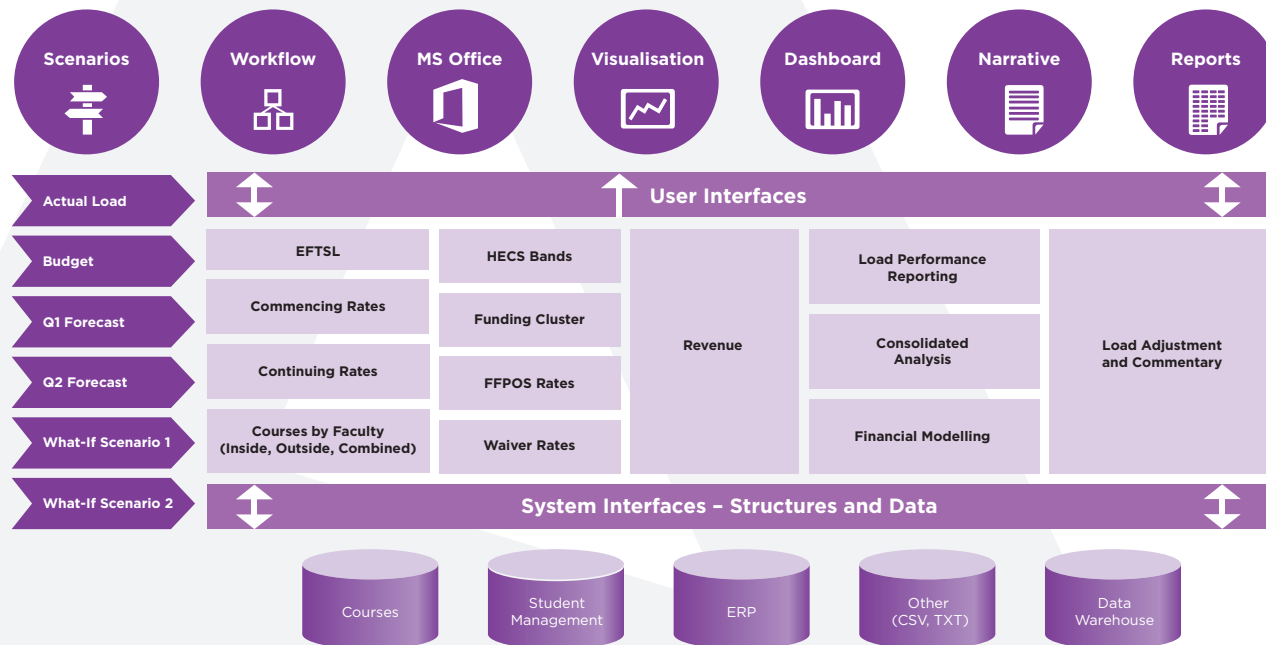
Also, the impact in Revenue calculation by changes in key drivers like EFTSL, HECS Bands, Funding Cluster and Full Fee Course Rates can be identified immediately and classified based on Fee Type.

The solution delivers a 5-year budget model where data is displayed at a monthly level and consolidated into relevant reporting periods. A forecast version can be produced for current year and updated every month.

Security profiles can be set up to control the different levels of access and privileges user groups will have within the application.

The solution can be deploy in the cloud or on premise depending on your needs.

Tridant's 'Fast Start' approach to implementing an EFTSL Load Planning gives you all the templates needed

Diagram

Top row (circular icons): Scenarios | Workflow | MS Office | Visualisation | Dashboard | Narrative | Reports

Left column (chevrons): Actual Load | Budget | Q1 Forecast | Q2 Forecast | What-If Scenario 1 | What-If Scenario 2

User Interfaces

EFTSL	HECS Bands		Load Performance Reporting	Load Adjustment and Commentary
Commencing Rates	Funding Cluster	Revenue	Consolidated Analysis	
Continuing Rates	FFPOS Rates		Financial Modelling	
Courses by Faculty (Inside, Outside, Combined)	Waiver Rates			

System Interfaces – Structures and Data

Data sources (cylinders): Courses | Student Management | ERP | Other (CSV, TXT) | Data Warehouse

Tridant's Solution for University Load Planning and Reporting includes:

- EFTSL Template to calculate Budget / Forecast based on historical distribution (Actuals).

- The template will provide continuing and commencing load modelling by course and faculty (Inside, Outside or Combined courses).

- Ability to make adjustments to continuing and commencing EFTSL numbers where required and at the same level of granularity.

- Fee type classification (FFPOS, FFPAU, Operating Grant) for advanced EFTSL and revenue analysis.

- Revenue reporting and calculation based on EFTSL modelling and input templates for HECS Bands and Funding Cluster rates, as well as Full Fee Rates by course.

- Tridant's Load Planning reporting capability includes:

- Weekly Load Report - Actual vs Budget & Actual vs Forecast

- Revenue Report (Student Fee, Cluster Amount, Waiver) - Actual vs Budget & Actual vs Forecast

- Data could be reported by faculty, course, fee type, HECS band, funding cluster, semester, census date, etc.

- The solution can be extended into predictive analytics as part of Tridant's comprehensive solution offering.

- Tridant's in-memory solution allows real time analysis and assessment of final calculations when key drivers change providing an optimised platform for what-if scenario modelling.

- A defined and documented process is delivered as part of the EFTLS load planning solution.

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Tridant Solution for University Workforce Planning & Reporting

Salaries and related expenses form a significant part of the overall expenditure of a University.

Faculty and School management are expected to develop and manage a strategy for their establishment within budgetary constraints.
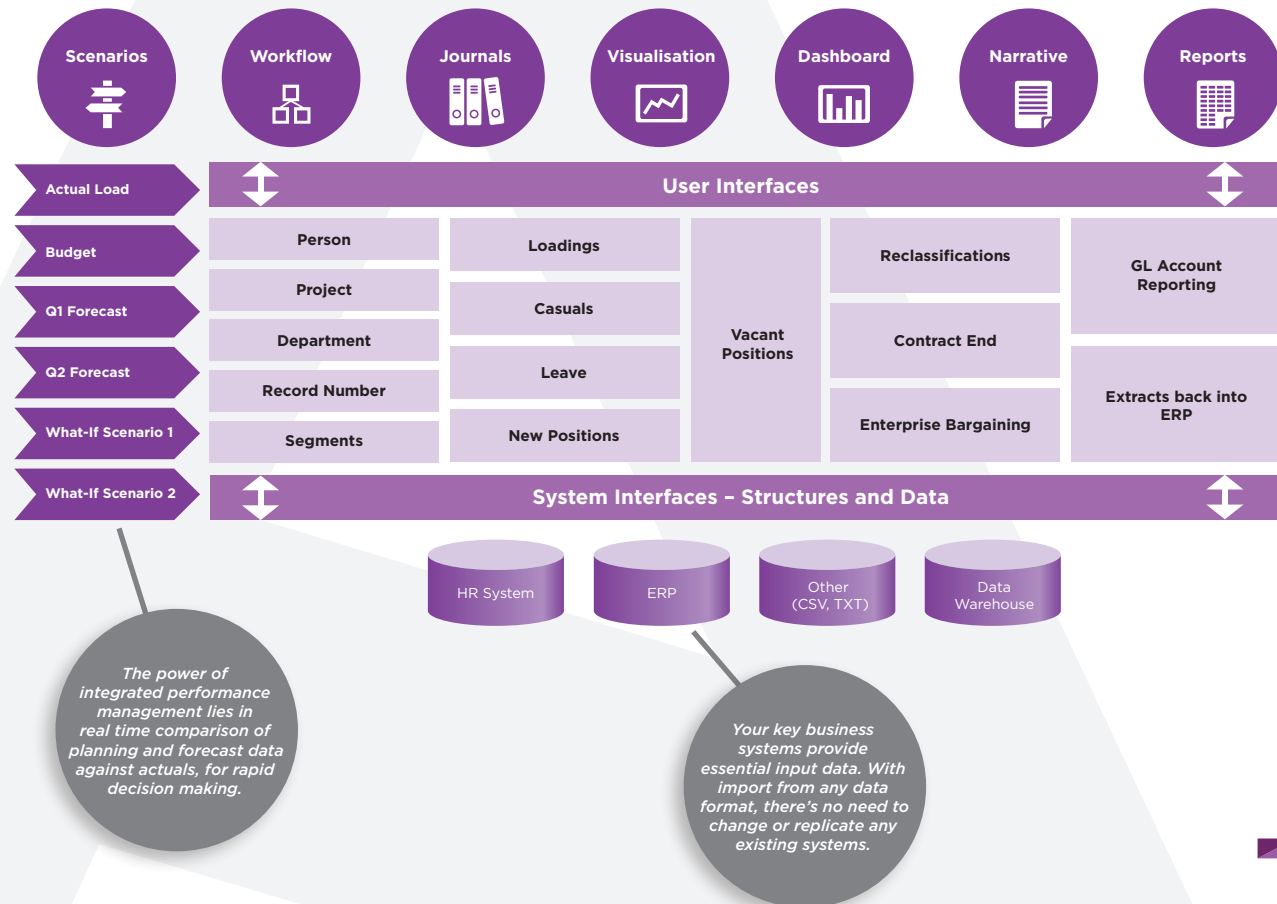
This is normally done through a combination of managing attrition, leave, delaying appointment to new and vacant positions and careful management of casual and temporary staff.

These strategies typically managed using a variety of manual methods and tools. Whilst detailed reporting is normally available on incurred or 'actual' salary expenditure, there is limited forecasting or commitments modelling capability.

A staffing 'spreadsheet' with budget and salary can assist with this process, but usage , compliance, monitoring, workflow and auditability will all be lacking.

Inconsistent management of salaries expenditure can lead to a lack of transparency for key stakeholders, often resulting in overruns being identified when it is too late to implement any pro-active corrective actions.

Tridant's 'Fast Start' approach to implementing Workforce Planning gives you all the templates needed.

Scenarios

Workflow

Journals

Visualisation

Dashboard

Narrative

Reports

Actual Load

Budget

Q1 Forecast

Q2 Forecast

What-If Scenario 1

What-If Scenario 2

User Interfaces

Person	Loadings		
Project	Casuals	Vacant Positions	Reclassifications	GL Account Reporting
Department			Contract End	
Record Number	Leave			Extracts back into ERP
Segments	New Positions		Enterprise Bargaining	

System Interfaces – Structures and Data

HR System | ERP | Other (CSV, TXT) | Data Warehouse

The power of integrated performance management lies in real time comparison of planning and forecast data against actuals, for rapid decision making.

Your key business systems provide essential input data. With import from any data format, there's no need to change or replicate any existing systems.

Tridant's Solution for University Workforce Planning and Reporting includes:

- Bottom up validation of the top down budgeting approach, providing a base for following years.

- Increased flexibility and modelling and forecasting capability to develop and manage salaries management strategies including direct traceability of changes made to the base model.

- A degree of consistency in the way that the salaries are managed across the enterprise.

- Improved workflow – enabling a working version and an approved base or revised budget.

- Decreased fractured and manual effort in managing salaries expenditure across the enterprise.

- Increased visibility of salaries expenditure and issues across key stakeholder groups.

- Pro-active identification of potential cost pressures to the salaries budget, providing the time and ability to implement corrective actions.

- Increased capability for scenario modelling and development at either a school/divisional/faculty or enterprise level.

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# Tridant's Higher Education Solution for Text Analytics

Developed on behalf of the Australian Government, the University Experience Survey (UES) aims at collecting feedback on high education student experience to gain insight on their levels of engagement and satisfaction.

The UES measures five core facets of the student experience including: **Skills Development, Learner Engagement, Teaching Quality, Student Support and Learning Resource.** The survey includes two open-response questions for student to provide textual feedback on the course best aspects and those in need of improvement. Institutions can also add their own specific questions into the survey.

Universities are meeting the challenge of categorizing a high number of open-responses and discovering insights to maintain and improve their student learning experience. However, traditional methods of response categorization are time consuming, have limited abilities, and are often expensive.

With the Tridant University Survey Text Analytics Solution, you can easily connect your source, and start extracting meaningful information from large data, reliably, quickly and to the fullest extent.

Qualitative Analysis adds depth to traditional quantitative analysis and unlocks previously hidden insights.
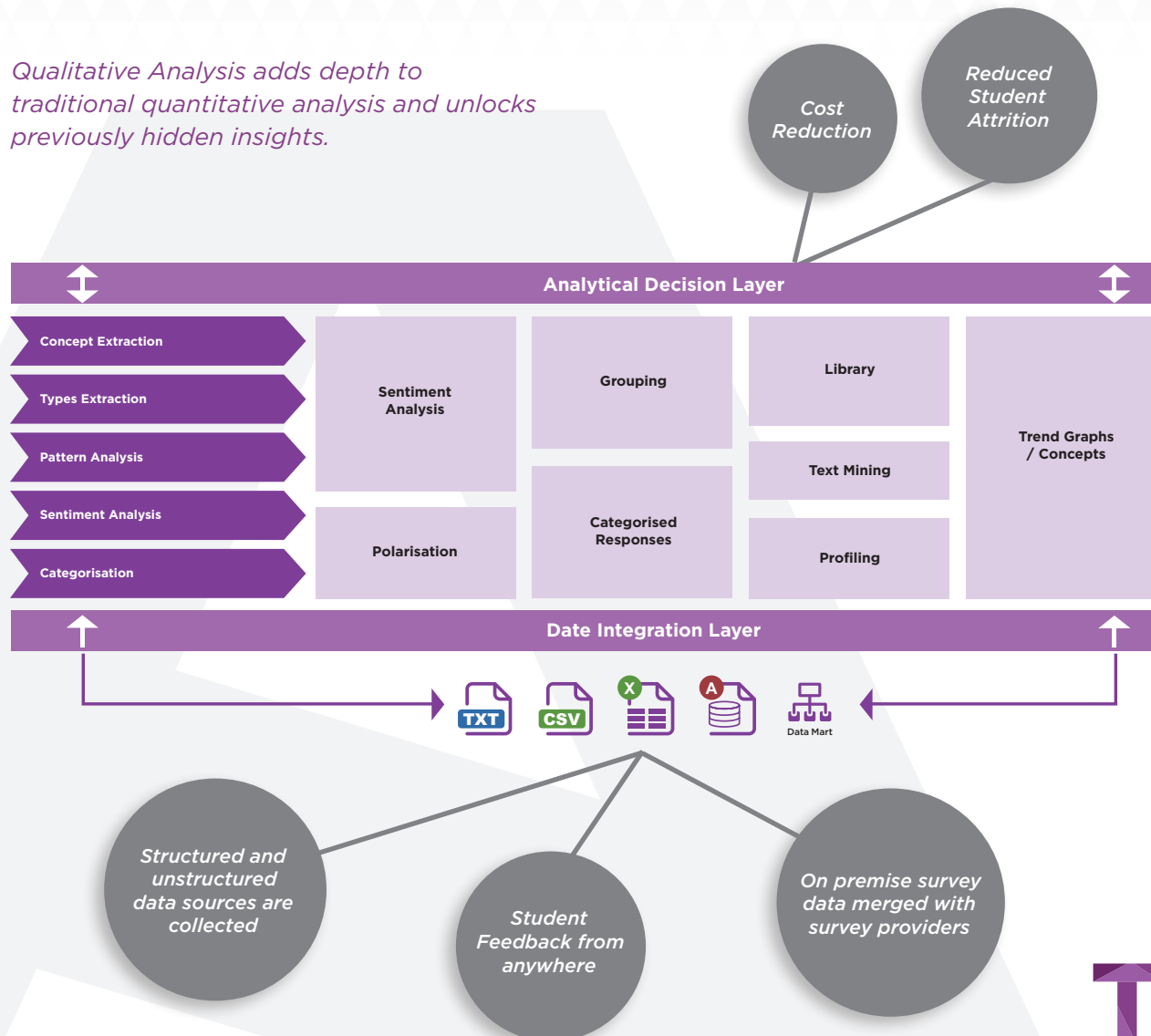
What's in the box:

- Ability to turn unstructured text, into structured data

- A library designed to order important terms and concepts related to **universities**, students, courses, and learning experience

- A customised library which can support **institution** specific terms to be extracted

- Customised libraries designed to support the extraction of terms and concepts specific to some **faculties** and **courses**

- Hierarchical Categorization for better interpretation of the results

- Customised categorization made with institution specific rules

- Student satisfaction rating

- Graphical report on or act on insights

- Deploy on the cloud or on premise, its your choice

Cost Reduction

Reduced Student Attrition

Analytical Decision Layer

Concept Extraction	Sentiment Analysis	Grouping	Library	Trend Graphs / Concepts
Types Extraction			Text Mining	
Pattern Analysis				
Sentiment Analysis	Polarisation	Categorised Responses	Profiling	
Categorisation				

Date Integration Layer

TXT CSV X A Data Mart

Structured and unstructured data sources are collected

Student Feedback from anywhere

On premise survey data merged with survey providers

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