

ACTIVE DIRECTORY (AD) GROUPS FOR EFORMS

This document provides general information surrounding AD groups. This document also outlines the process involved in creating Active Directory (AD) groups and requesting updates to the Student System.

Version 1.0

Created by the Intelledox Digital Transformation Centre (IDTC)

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1. Active Directory Groups for eForms

1.1 Background

The Student eForms currently being developed by the University require workflow to be managed via Active Directory (AD) Groups. AD Groups are used within the University's IT User Directory to organise user accounts into manageable units.

Student eForms have a range of roles that will be configured within Student Administration System (SAS). Similar to the current HDR milestone approvals they are managed by College Student Administrators (access is granted by Student Business Systems and is usually restricted at the College level). All eForms, including the new HDR milestone eForm will be maintained within the following page in SAS:

Records and Enrolment -> Career and Program Information -> Forms Approval Configuration

1.2 How do I configure the Approvals page in SAS?

The Active Directory Group works in conjunction with a functional inbox. As an example, the School of Demography uses a Head of School functional account called **CASS Demography Head Mbox**.

This AD Group allows its members (Figure 1) to access the functional email address

head.demography.cass.anu.edu.au.

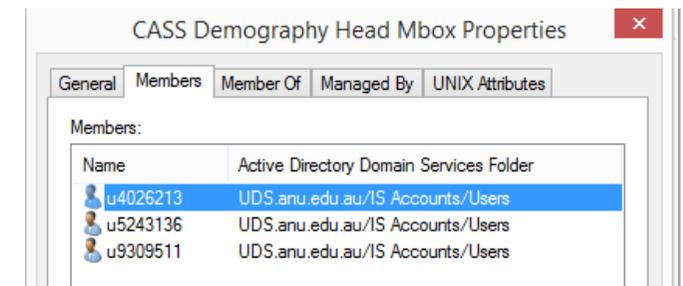


Figure 1 the AD Groups members

This particular Group is configured as a Delegated Authority within the SAS Approvals page like so:

Academic Career	Academic Plan	Description	Research Acad Org	Description	*Role	Empl ID	Name	AD Group	AD Group Name	*Email ID
7	RSCH	9520XPHD	PhD RS Social Sciences	66	ADSRI	Delegated Authority		CASS Demograph	Demography Head of School	head.demography.cass.anu.edu.au

1.3 How will individuals be notified about items to action in eForms?

When a workflow step is completed, users are notified by email. Emails will be sent to the AD Group functional email account. Users will be required to access the folder directly and check it regularly or have auto forward rules configured to redirect the email to their University inbox.

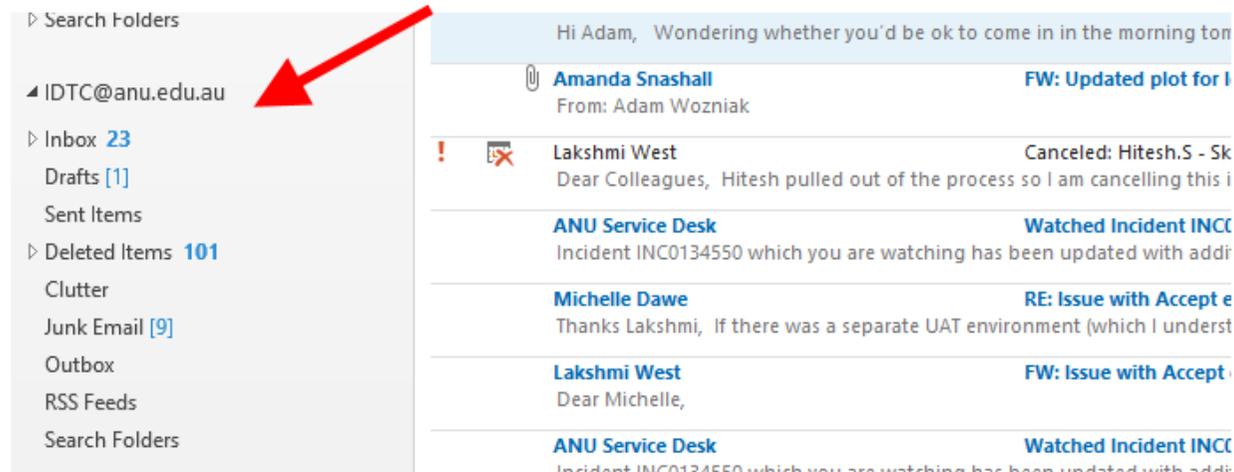


Figure 2 Functional email account added to Outlook

Emails will contain information about the student, the form and will also have attached a summary document in pdf format containing a snapshot of the form. The email will also contain a link directly to the specific form in the eForms system. To help identify the purpose of the email the subject line will always be prefixed with “For Action” or “For Information”.



Figure 3 Example of an email sent from eForms

To add a functional email account in Outlook please follow the following instructions:

<https://services.anu.edu.au/information-technology/email/adding-a-functional-account-in-outlook>.

1.4 Can more than one eForm function share the same AD Group?

Yes. This all depends on how each College would like to set-up their functional accounts. As an example when setting the Delegate Authority used on the HDR form you may use a HoS Group for both the Head of School and Delegated Authority roles. When it is the same group for multiple purposes the eForm is smart enough to know that it is going to the same set of individuals and therefore will only require one approval instead of two.

1.5 How do I set-up a new AD Group or add people to an existing AD Group?

To set up a new AD Group you may log a job with the IT Service Desk <https://servicedesk.anu.edu.au/selfservice/>: select Request services -> Access and ICT service and complete the form. Please note your HoS/Dept will need to approve the service job before submission to the IT Service Desk. Alternatively you may like to organise directly with your local IT.

If there are many new accounts required to be created then IDTC is happy to co-ordinate this on the Colleges behalf.

After creating a brand new account, you must also notify IDTC idthc@anu.edu.au, so that we can add the group within the eForms system.

The University has an email policy https://policies.anu.edu.au/ppi/document/ANUP_006603. Please ensure that naming convention meet the guidelines below:

Team/role alias

1. A position/role alias email account reflects a specific position or role within the University, such as Vice-Chancellor or Dean; they can also reflect a responsibility, such as Privacy Officer. Position/role alias accounts are issued using the format '**position title.organisational unit@anu.edu.au**' or 'keyword@anu.edu.au'.
2. Email sent to a position/role alias address will be delivered to the personal email mailbox of the employee/s occupying the position/role. They also have the ability to send email using the alias.

Team/role mailbox

1. A function/team email account can be established on behalf of several people who are responsible for the same service, and issued using the format 'area name/organisational unit@anu.edu.au'.
2. Staff access can be added and/or removed from a team/role mailbox by submitting a request via the IT Service Desk.
3. Function/team mailboxes are issued as a licensed mailbox in Office 365, which has a 50GB mailbox, 100GB online archive and In-Place Hold to meet the University's legal requirements.

Examples

- da.hdr.rsb@anu.edu.au – HDR Delegated Authority for Research School of Biology
- assocdeanhdr.cass@anu.edu.au HDR Associate Dean for College of Arts and Social Sciences