

In Progress

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
ITPC-0677 Improve Sharing & Collaboration with Data Lake Services	<p>This project will implement an enterprise data lake service for use by data analysts. The effect is that data analysts will have a centralized data storage service that they can utilize instead of having to maintain or procure their own.</p> <p>The Microsoft Azure data storage solution will be used as the tool upon which the data lake service will be constructed.</p> <p>Processes and procedures to establish, maintain, and support the service will be defined during this effort. This includes governance, access and security, training, and support.</p> <p>Benefits: An enterprise data lake provides for better sharing and collaboration with data. Data analysts can store data in the data lake and utilize that data for analytics and reporting. This provides data analysts with the next generation data analytics capabilities necessary to provide the necessary information to University decision makers. Actionable insights available through better sharing and collaboration allow for better, informed decision making.</p>	<p>CDW has determined that we would benefit from implementing Microsoft Fabric with One Lake rather than implementing Azure Data Lakes. CDW Workshops are continuing but we still have not yet had the chance to get a comprehensive breakdown of additional cost/new functionality that this will provide over Data Lakes. Once these Workshops are completed, the project will be taken off hold, time/resources will be re-estimated and re-baselined. Initial Requirements and Task plan has been provided from CDW, but this document is still under heavy refinement during our information gathering phase. Review of SOC2 and Complimentary User controls on hold until further security discussions are completed</p>	July 2023	October 2024	BI PM	Dimuthu Tilakaratne
ITPC-0678 Provide connections to data with data movement tool	<p>This project will implement a new enterprise data movement tool for data integration tasks. Data movement is associated with Extract, Transform, and Load capabilities, otherwise known as ETL. A new data movement tool will provide access and integration to data from most modern data storage systems, including cloud-based and vendor-hosted solutions.</p> <p>The vendor Talend has been selected for this implementation. The selection of Talend is the result of the analysis completed for the ITPC-0621 Next Generation Data Analytics Modernization project.</p> <p>Processes and procedures to establish, maintain, and support the Talend data movement tool will be defined during this effort. This includes governance, access and security, training, and support.</p> <p>Benefits: The current ETL tool is limited in its ability to connect to many data sources currently in use by the University of Illinois. A modern ETL tool, like Talend, supports connections to most modern data storage solutions. These include source data systems in the cloud or hosted by a vendor. That enhances data integration and sharing of data, which is a driver for modernizing our data architecture technologies.</p>	<p>POC for Rejects process in Talend in progress. Due to cost and work effort, review with leadership will be scheduled to determine the path forward. Working on Cornerstone API Extracts in Talend environments. Continuing to refine training and documentation.</p>	July 2023	July 2024	BI PM	Dimuthu Tilakaratne, Kelly Block
ITPC-0699 Update BO universes to new format to continue support	<p>SAP Business Objects is the supported enterprise reporting tool used at the University of Illinois. Business Objects Universes are used to deliver standard reports and ad-hoc reporting capabilities. SAP has deployed a new format, UNX, for the development of the BO Universes. SAP has developed plans to deprecate the legacy format, UNV. In order to be able to stay on supported versions of SAP Business Objects, all BO Universes have adhere to the new UNX format. The proposed timeline for deprecation by SAP is to end mainstream maintenance December 31, 2024. Before that date AITS will have upgraded to SAP Business Objects BI 2025.</p>	<p>Changed Percent Complete from 12% to 15%. Working to get the POC up and running. Planning sessions have been scheduled and team will be setting up a Half Day working session to complete end to end POC example of UNV to UNX Universe Conversion. Resource constraints are impacting this timeline. Team will continue working with SOS5 to refine change management strategy and identify steps to build awareness and address impacts with users. Reviewing roles and responsibilities with the TAM Areas to confirm involvement. Determining approach and methodology for migration rollout.</p>	October 2023	October 2025	BI PM	Dimuthu Tilakaratne, Mike Wonderlich
SVS-0021 Facility Condition Assessment Investigation	<p>The University of Illinois Urbana-Champaign (UIUC), the University of Illinois Chicago (UIC), and the University of Illinois Springfield (UIS) seek to embark on a system wide facility condition assessment (FCA). The FCA will provide a comprehensive evaluation of building systems, identify deficiencies and suggest and prioritize future repair or replacement needs. Building surveys will evaluate the general health of physical facilities by identifying and arranging inadequacies that require critical, urgent, and necessary remediation in alignment with risks associated with the inadequacies and their potential impact on life safety, continued building operation, and functionality. The appraisal will consider the age and serviceability of systems, components, and finishes of buildings to forecast replacement of facility assets as they reach the end of their serviceable life, as well as regular preventative maintenance impacts on expected replacement timelines. The objective of this investigation effort is to issue an RFP and based on responses determine next steps with the goal to identify a consultant to assist with the analysis and provide expertise on a software solution to track asset improvements and up-to-date condition reports.</p>	<p>Assessments are on schedule and there are quarterly update meetings for university executives. A final report is expected in spring 2025. Moving end date out to 3/31/25 to reflect that some fieldwork may linger as the final reports are prepared.</p>	September 2022	March 2025	Capital Programs	Mike Wilson

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ITPC-0669 Replace aging Capital PM systems with a vended system	<p>The University Office of Capital Programs (UOCP) seeks to replace two aging software systems that currently provide project and financial management support to university capital construction units. This project will lead to the retirement of PRZM and FCPWeb. Integrations with current peripheral softwares are being considered. This includes not only Banner but capital-centric systems such as AIM (work order system), VSA/CAPS (vendor maintenance system), and Contracts+ (contract creation and approval system). The Capital Enterprise Data Warehouse (EDW) will also be impacted as the majority of Capital data in the EDW is sourced from either PRZM or FCPWeb. The determination of whether or not the Capital EDW needs to be sourced from the new CPM application or if the CPM has sufficient reporting capabilities that a Capital specific EDW is no longer required will be made once a CPM system has been selected. Access to data exported from the system in a daily batch process is required.</p> <p>Note: An RFQ was issued in early 2022 and three vendors replied. UOCP is utilizing an outside consultant versed in project management-centric software solutions to help determine which is the best fit. This PAPP submission relates to the need to procure and configure the solution. Subsequent phases such as implementation and training will be added to the PAPP scope once determined.</p>	<p>Changed Percent Complete from 85% to 86%.</p> <p>The second phase of project data migration was completed July 15th. There were a few issues that we worked closely with the implementation partner to resolve. We continue to highlight lessons learned from each data migration to roll into improving the next. UOCP is currently negotiating a SOW change order with the implementation partner to include our final data migration efforts. We are targeting October for that full transition, only allowing projects that will hit substantial completion by year end to finish in PRZM and FCPWeb. Users in Kahua have heavily leaned on the support team and training materials as they are learning how to navigate and do their work in Kahua.</p>	January 2023	October 2024	Capital Programs	Mike Wilson
SYS-0023 University Vehicle Accident Reporting Process Assessment	<p>The University Vehicle Accident Reporting Process Assessment Project (herein referred to as "Assessment") is a result of an ongoing State Compliance Audit finding related to Accident Reports testing. Specifically, the auditors have tested whether the University is in compliance with two benchmarks when an accident occurs in a university owned vehicle: (1) was the accident reported timely to CMS per the Illinois Administrative Code and (2) was the accident reported timely to the University per University policy. Several State Compliance Audit findings have been attributed to university noncompliance in accordance with this testing.</p> <p>The Assessment will examine the vehicle accident reporting structure implemented through policy and procedure at each of the three universities. The gathered information will then be utilized to determine whether a legislative change, change in State rules, or a change in University policy or procedure would assist in decreasing the number of State Compliance Audit findings in relation to this testing. The overall goal of this project is to improve the Vehicle Accident Reporting process to increase compliance under the State Compliance Audit.</p>	<p>Changed Percent Complete from 70% to 80%.</p> <p>We are currently working on the final report and hope to have that completed in September/October.</p>	October 2023	September 2024	Finance	Bill Patterson, Ginger Velazquez
ITPC-0700 Commodity Codes clean-up for improved reporting	<p>The Commodity Code Clean-up effort will consist of updating our current NIGP Commodity code listing and deleting/terminating outdated and user created codes. This effort will also include a change management effort based on creating new policies and procedures around proper use of the codes, as well as creating a system for review and approval of user codes that need to be added.</p>	<p>Changed Percent Complete from 20% to 25%.</p> <p>UNSPSC-NIGP Crosswalk and Alphabetical Class-Item eBook have been purchased through Periscope. Data analysis with current NIGP codes is underway to determine what current rogue codes need to be terminated and what codes need to be changed to valid commodity codes that comply with NIGP.</p>	January 2024	December 2024	Finance	Aaron Carter, Dan Szajna
ITPC-0681 Automate billing process with new GAR Bill Banner table	<p>University of Illinois produces over 37,000 GAR bills for 6,700 departmental customers for over \$71 million each year. University Bursar is requesting a new Banner table to be built that would be populated by the Monthly GAR process, TFRBILL. The new table would allow Bursar to fully automate the billing process by containing all of the billing data inside Banner instead of just in a Banner lis file. The process and table would be a copy of the current setup utilized by the Monthly SAR bill process, TSRRBIL. The new table would be populated each month upon the TFRBILL process run and contain all appropriate data from the bill run, such as bill date, due date, statement number, address type and sequence number, total account balance, and total past due amount.</p> <p>Currently details of GAR bills are maintained only in the standard Banner lis files and pdf output of the process.</p> <p>Benefits: With a static bill table, Bursar can streamline processes related to the printing process of the GAR bills, being able to query addresses in realtime and create an automatic process to send files to print services based on addresses saving Bursar over 100 hours a year. Additionally, Bursar would be able to produce historical reports directly from Banner reporting sources such as REPTPROD. The table would help Bursar to research any questions related to GAR billing from a central location versus digging through Banner lis files. Last, The table would be a new resource for University departments to be able to review data provided to there customers through Banner GAR.</p>	<p>Analysis of cloud data virtualization tools such as Denodo are being explore to determine if this table can be built in a Saas-friendly manner for future Banner migration to the Cloud. It is estimated that this project will lay the grounds for future table creation that will need to be Saas-friendly. Working with the project team to estimate project duration and if it will be completed by end of 2024.</p>	May 2024	December 2024	Finance	Erin Herrick

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ITPC-0683 Self-Service page for student access to sponsor data	<p>University Bursar administers the Sponsor Billing program which bills approximately 3,500 students for \$53 million across the three-campus system. Sponsor Billing is an arrangement a student will make with an outside organization, like their employer, to have their educational expenses paid. Bursar uses the baseline Banner processes to credit (pay) the students AR account and then charge the sponsors AR account in Banner, subsequently billing the sponsor for the student's charges. The baseline Banner processing works very well but is missing some functionality for the students, mainly that students are unable to view the details that go into paying their student account. Bursar is requesting a new Banner Self-service page to be built that would display all the pertinent information to the students regarding their sponsorship. The page would include Sponsor account number, charges paid by the sponsor, Invoice numbers and remittance information from the Sponsor (see end of this document for a mockup). The new page would allow students to log into Banner self-service to review this information themselves instead of emailing Bursar staff. Additionally, the page could be made available through Proxy Access to appropriate staff to review the information.</p> <p>Benefits: With a self-service page for students, Bursar can reduce the number of emails and phone calls that are addressed to sponsor billing related to the status of a sponsorship. The reduction would free up our Sponsor Billing team to focus on communications with the Sponsor about the Invoices and payments due as well as work on any past due accounts. Additionally, the new page would help our frontline customer service team to field some additional questions as the information would be readily available.</p>	Development of the self-service page using Ellucian Experience cards is underway. First round of testing and feedback is underway. API set up is a larger effort than originally thought so working with project team to understand what is needed and level of effort.	May 2024	December 2024	Finance	Erin Herrick
ITPC-0593-A S2P iBuy Optimization Project	Optimize the Jaggaer eProcurement module by taking advantage of functionality that has not been fully implemented, which may involve undoing system workarounds which were created by the University when the iBuy system was originally deployed. The eProcurement module incorporates requisition, catalog, and spend tracking functionality that should be leveraged. Work with Jaggaer and Ellucian to resolve issues related to the current integration method. Determine where the University may have deviated from Jaggaer's standard configuration to facilitate upgrades, bug fixes, and ongoing maintenance.	Changed Health from Green - On track to Yellow - At risk with corrective actions. The team ran into an issue where we found that possible PHI was being sent on invoices. We are working with the universities and departments to better understand current state and looking at options for how to best manage this in future state without creating impacts to departments or patient care. This issue is going to move our timeline out for go live. More information will be provided as we know it. Jaggaer and TrustFlow are being flexible with our timeline and giving us time to build this new scope into our plan.	July 2019	December 2025	Finance	Jerry Joseph Mike DeLorenzo Brent Rasmus Kelly Block
ITPC-0645 Deliver improved financial data with FPPM Dashboard	<p>The FPPM Dashboard will deliver improved financial information insight across the University of Illinois System. It will be used by University leadership, Budget Officers, Deans, Directors, Department Heads, Academic Fiscal Officers and Business Managers to monitor their financial process performance health in an informative and customizable format divided by actionable and informative items. The Dashboard will also be used by the CFO and system office staff to monitor the efficiency and effectiveness of financial processes and to offer support needs based on institutional risk. Dr. Ghosh has met with the project sponsors to confirm his support to offer financial process performance information in this format. The current iteration includes five metrics of actionable information and the Analysis team will interview key personnel in units, colleges, universities, and system offices to determine additional metrics and style options. The Dashboard and metrics were preliminarily vetted through various business staff to confirm both efficacy and value.</p> <p>Expected Benefits: By defining financial parameters and the data elements needed from disparate systems to appropriately measure financial process performance, day-to-day operations will be more focused efficient and effective. The Dashboard will enable the unit and college leadership to collaborate with system office staff in defining the data, access, and other Dashboard requirements so the product applies common definitions to parameters and improves process transparency. The Dashboard will highlight problematic process areas so education and resources may be applied which will in turn reduce state compliance audit findings. Additionally, savings will be realized as staff resources allocated to monitoring financial operations will become more efficient and will allow for resources to be used elsewhere.</p>	The first iteration of the dashboard has completed initial user testing. Team is working on determining details of logic changes that are needed and will be applying those changes for another round of testing. The updates to the My-UI-Financials application for the new dashboard are in Test environment.	August 2022	August 2025	Finance	Kelly Block, Gloria Keeley, Brent Rasmus, Julie Zemaits
ITPC-0593-E S2P Card Program Project	<p>As Jaggaer does not offer a credit card purchase and payment mechanism, this effort is outside the scope of the iBuy Optimization. It is strategically important to assess the advantages and disadvantages of various card programs. It is also vital to identify an alternate solution to the existing PCard software which is at end of life.</p> <p>This request is for approval to complete the following:</p> <ul style="list-style-type: none"> * Create a team to analyze the various uses of credit cards available as possible solutions to a variety of procure to pay needs * Investigate how credit card uses align with procurement strategy and the cost/benefit of deployment of the various identified possibilities. The team will consider cost savings due to reduced transaction costs as well as the ability to leverage the income that can be generated as the result of robust 	Changed Percent Complete from 23% to 36%. Wireframe usability testing has begun. The first round of tests are expected to be completed by 8/9. Data model is undergoing some changes based on feedback. Once data model changes are complete and approved, the Oracle database will be built and .NET development will begin.	January 2024	March 2025	Finance	James Martinie, Darren Strater

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ITPC-0674 HR/UPB updates due to new SURS Pension Admin System	<p>SURS will be transitioning to a new Pension Administration System in the next 4 years. This will require significant modifications to existing business processes and systems. Human Resources (HR) and University Payroll & Benefits (UPB) will need to analyze current business processes, determine how they need modified and implement new policies and procedures to accommodate the new system. AITS will need to modify existing applications, files and reports for the various SURS components that exist today. In addition, there will be a need for new applications, files, and reports to meet the needs of the new SURS Pension Administration System.</p> <p>Expected Benefits: Faculty will have accurate reporting of SURS eligibility and benefits to SURS / Meet the requirements of the new system</p>	<p>Changed Percent Complete from 5% to 6%.</p> <p>Work is very slow to do other regulatory and fiscal year end projects that have due dates this year.</p>	March 2023	April 2027	HR	Jami Painter, Cheri Canfield, Shari Mickey Boggs, Melissa Mlynski, Larry Hanyzewski
SYS-0024 Motor Vehicle Record (MVR) Ordering Process	The System needs to implement a process for ordering MVRs for "regular drivers" of university owned/leased vehicles. This is due to a new underwriting requirement from the System's Excess Liability insurance carrier. The project includes determining the university's definition of regular driver, identification of a method (vendor) for ordering the mvr's, procedure for reviewing mvr's, potential storing of PII, and development of process/policy for how adverse mvr's will be handled.	<p>Changed Percent Complete from 50% to 60%.</p> <p>Changed Health from None - No health has been set to Green - On track.</p> <p>Subcommittees were formed to work on various aspects of the project and meet as needed in between monthly meetings. The committee is making progress toward policy and procedures.</p>	June 2024	October 2024	Other	Tina Harlan, Shelly Romack
SYS-0025 Research Policy Database Tools	Research available tools and systems to create a centralized database for all policies. Currently, policies are spread across various websites and managed in different ways. Our aim is to consolidate these into one central location for easier management and process flow, consistent updates, and efficient retrieval of historical information and current polices, especially for audit requests and as an accurate resource for the system. Internal departmental policies (i.e., governing internal office processes and policies) are currently outside the scope of this project.	<p>Changed Percent Complete from 0% to 10%.</p> <p>Changed Health from None - No health has been set to Green - On track.</p> <p>The project has kicked off and we are currently in the process of finalizing our requirements. The project team should be ready to begin reviewing existng database systems within the next two weeks.</p>	June 2024	October 2024	Other	Karen Greenwalt
ITPC-0605 Impl ITSM(IT Svc Mgt) and PPM(Proj Mgt) Cloud Solution	This project is to purchase, integrate, and deploy an enterprise ITSM and PPM Software as a Service (SaaS) private cloud solution to replace the existing, vended on-premise product that has reached its limits of effectiveness and adoption at the University. The ITSM Research Group, formed by the U of I IT Leadership Team, built criteria to analyze and evaluate vended solutions that could meet the University's business needs and replace the existing solution. The ITSM Research Group provided a gap analysis, decision criteria evaluation, and overall final recommendation to the U of I IT Leadership Team that pointed to TeamDynamix as the selected vendor to meet existing business needs and allow for additional functionality and future growth.	<p>PPM Reporting: DS is wrapping up source data analysis. Remaining questions were sent to user groups. Data modeling for the design of the EDW tables has begun. We'll have a data model review with the user groups once it is complete.</p> <p>Group Management: iPaaS pilot efforts are in progress with TDX consultant. We will work with the consultant and reps from each university to get POC completed by the end of September/beginning of October.</p>	October 2019	October 2024	Technology	Kelly Block, Tulio Llosa
ITPC-0620 Replace SecApp to improve access request / provisioning	This project's purpose is to build, integrate, and deploy an AITS Security Application to replace the existing, homegrown product that has reached its limits of effectiveness and adoption at the University. The AITS ITPC-0584 Security Application Analysis project team completed a full examination of the current process and wrote user stories with requirements that aided in evaluation of a build or buy (vended) solution recommendation. The overall final recommendation to the University of Illinois AITS Leadership was to utilize the existing midPoint application architecture as a backend to meet the existing business needs and allow for additional functionality and future growth. Additionally, the recommendation included creating a governance structure and establishing standard processes for integration and adoption post-implementation as well as develop a training plan to assist in adoption of the new product.	Development work continues on approval process HTML. The add/edit access redesign is underway and the business justification/challenge page is in UX design. The rest of the team is working on several tasks. One is to create a query that will identify Non-payroll staff. The team is also working on documentation of complex scenarios for requesting multi-campus access for Banner student and resulting workflow process. (Related to Banner FGAC and VPD). One challenge the team is working through is the design/development of shared settings for profiles. There is also work in progress for consolidation of student approval groups to prepare to take to student groups for confirmation on the proposed consolidation. Backlog refinement continues with the core analyst group working on acceptance criteria for instances where employees have a terminated status but still have current access in the application. The goal is to have these automatically removed after communication with the USC.	August 2021	March 2028	Technology	Kelly Block, Karen McFarlin

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ITPC-0708 Capital Programs' Kahua Application Integrations and Reporting	<p>The University Office of Capital Programs (UOCP) has been in the process of implementing Kahua to replace two software systems that currently provide project and financial management support to university capital construction units. This effort will implement reporting and needed integrations that were not able to be included in the initial July 2024 planned release. This is due to an accelerated timeline and functionality that was not determined to be available as we are implementing the Kahua product that will try to be addressed with a few focus areas in this project, if prioritized as such. Reporting functionality needs that are in place with PRZM and FCPWeb through the EDW will now need to come from Kahua. Establishing the connection and design of the new reporting tables/universe in the EDW are part of this project.</p> <p>Expected Benefits: Reduce or eliminate duplicative data entry Provide a more modern and streamlined technological solutions to common project management issues Allow for better reporting to be used or shared to manage all capital projects</p>	Changed Status from Submitted to Approved (Not Started).	July 2024	April 2026	Capital Programs	Nyle Bolliger, Mike Wilson
ITPC-0632 Outsource University Check Printing	<p>Solicit bids for the University of Illinois System to outsource check printing and distribution operations to a vendor with industry expertise, redundant failover processes, business continuity assurances, and high-speed operations that can fulfill University stakeholder requirements. Outsourcing approved check files to an external vendor for maximum operational performance, business continuity, and providing this critical, essential service will improve the highly manual process used today and better leverage industry expertise and maximize University resource allocation for responsibilities that increase value.</p> <ul style="list-style-type: none"> * Anticipated cost savings or cost neutral from equipment needs, paper supplies, reduced staff time and effort, and postage costs. * Transfers risks for continued operations of critical services, and recovery activities for issues to the vendor. * Shifts costs and liability to the vendor for ensuring end to end reconciliations and accuracy to eliminate printing errors such as damaged checks, missing checks, or duplicate checks. 	Will hold off on starting effort until other potential projects scope/goals are defined to determine if there is need for this effort.	November 2021	June 2022	Finance	TBD
ITPC-0679 New page for GAR customers to make updates in Banner	<p>University of Illinois annually bills 6,700 departmental customers for over \$71 million in non-student receivables through General Accounts Receivable (GAR). University Bursar is requesting creation of a new GAR customer page in Banner Self-Service (alternative detailed in Section 15) for the 3,000 monthly GAR customers that would help facilitate self-service account maintenance functions as well as allow University Bursar to leverage our online billing and payment portal. The new page would allow GAR customers to login, review, and update account demographics: email(s), address(s) and phone number(s) utilizing currently available Banner APIs; replacing manual account updates. Additionally, GAR customers would be able to access UI-Pay, the University of Illinois System billing and payment platform, UI-Pay, to view their current bill, historical bills, make payments, sign up for payment plans and view real-time account details.</p> <p>Benefits: Currently many processes with GAR customers are manual and require effort from both University Bursar and a University Departments to maintain the accounts as well as provide account services. The new GAR self-service page would allow the University to utilize Banner provided APIs to automate the collection and maintenance of email addresses and billing addresses as the customer would have the access to updated themselves. Additionally, gaining access to UI-Pay would give the customers more services than are currently available. The customer would be able to see real-time information versus one day old. They would gain access to historical statements which are currently not available online and are only paper copies. They would be able to sign up for customized payment plans. Last, they would have the option for additional ways of paying like international wires. These improvements would increase ease of use for billing departments, departmental customers as well as improve revenue recognition and the billing cycle.</p> <p>The University would also be able to decommission an internal GAR payment portal, which struggles with technical support and updates. This would also reduce compliance risk surrounding e-checks and credit cards payments.</p>	Project has been approved by ITPC and awaiting resource availability and AITS prioritization.	June 2023	November 2023	Finance	Bill Patterson
ITPC-0680 Streamline State Offset Process with new tables & form	<p>University Bursar is requesting a new Banner table(s) and user interface form for the State of Illinois Offset Process. State Offset is a process required by Illinois state law in which the delinquent accounts are submitted to the state for the purpose of collections. As a state agency the University of Illinois is required to submit claims to the state comptroller on delinquent accounts that meet the specified criteria of having balance of \$500 or more that is past due more than 60 days. Section 10.05 of the State Comptroller Act (15 ILCS 405/10.05) requires the Comptroller to deduct from warrants payable to any person the amount for which there exists a claim due and payable in favor of the state. Prior to submission of the claim, a warning letter must be sent to the debtor outlining the planned action and their rights to dispute the debt. After the warning letter is sent the debtor has 30 days to dispute the debt and/or request a hearing on the validity of the debt. Following the 30-day period, Bursar submits any non-disputed accounts with the comptroller and performs monthly maintenance on those accounts to keep balances up to date.</p> <p>The new table(s) would house all the data that is created by the University for the offset process, such as letter date, dispute date, offset submit date and Deduction order number along with the data created by the comptroller, such as IW Number, claim status, and update date. The table(s) would be updated by consuming standard feeder files from both the comptroller and Bursar as well as being editable via a Banner screen. Bursar would then utilize the new table(s) and screen to streamline the process for both students and staff by being able to see data in real-time.</p> <p>Benefits:</p> <ul style="list-style-type: none"> * Will eliminate the lag time between process updates for accounts. * Will be more accessible to employees who can instantly access updated account data. * Will eliminate the risk bad data or losing account information due to human error. * Will improve data reliability being reported for quarterly report on State Offset which is being used in legal and audit purpose. * Will eliminate the need for a middleware database and process, and the staff time dedicated to maintenance and upkeep, by incorporating the business data in Banner. 	Project has been approved by ITPC and awaiting resource availability and AITS prioritization.	June 2023	August 2023	Finance	Bill Patterson

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ITPC-0682 Automate SAR bill format to reduce Bursar process time	<p>University Bursar is requesting a new process to be built to create the monthly bill file submitted to our vendor NBS Quikpay. University Bursar is responsible for the monthly student billing of our 95,000 students. We utilize the built-in banner billing process, TSRRBIL, which uses the banner data to create the monthly billing statements for the students. This process then outputs a flat file that is uploaded to NBS QuikPay server for them to render the bills for the students. The process had previously been automatic with AITS running the process, encrypting the file and uploading to NBS Server. In recent years, the process has become manual as the baseline banner file contains errors. These errors stem from the banner data containing tab characters, multiple rows of city/zip code, foreign characters, etc. The file now has to be manually reviewed each month to remove the issues before submitting to NBS. This has proved to be an obstacle in having an efficient billing process since the bill load process may sometime take multiple attempts when there is manual review of the flat file. To eliminate this billing process delay, the bill file needs to be reformatted in a Nelnet server acceptable format which won't be rejected during the upload process.</p> <p>In addition, University Bursar wants to take this opportunity to improve a few other issues that have hindered the efficiency of billing. Specifically, NBS now allows for schools to send over the student email address as part of the bill file. This was eliminating a custom step that Bursar performs each month to obtain the email addresses of students not within NBS system and send a manual email blast. Therefore, University Bursar is looking to change the bill specs with additional information as well as build a customized parser that would clean the existing data fields being retrieved from the Banner for special characters and have them in appropriate format before uploading the file to the Nelnet server.</p> <p>This project would have a number of Benefits for Bursar and Students:</p> <ul style="list-style-type: none"> * Will help eliminate the upload failures to the Nelnet server. * Will create an efficient monthly billing process by cutting down the processing time to one day instead of taking up to four days. * Will automate the bill notifications to all come from NBS instead of a separate manual process from Bursar. 	Project has been approved by ITPC and awaiting resource availability and AITS prioritization.	June 2023	August 2023	Finance	Bill Patterson
ITPC-0684 Automate & track annual term-based detail codes process	<p>University Bursar would like to automate our existing manual processing of Term-Based Details Codes. Each year, Bursar works with the 10 University departments to update the 650 term-based detail codes. The process is labor-intensive, using Banner screens to make copies of old records then modify the records directly in Banner with details provided via email from the departments. Allowing for multiple points of user error. Additionally, departments will send the data to our office piecemeal leading to a long processing time.</p> <p>The manual process includes having to:</p> <ul style="list-style-type: none"> * Receiving files of detail code information in emails * Create a two-digit term-based code for each upcoming academic term (Fall, Spring, Summer for UIC/UIIS) and (Fall, Winter, Spring, Summer and a general Academic Year for UIUC); <p>For each unique detail code, make a copy of the code, insert new C-FOAP lines, one line for each term for the new Academic Year, and update the prior Academic Year term C-FOAP per each unique detail code. Review of Changes made to ensure all codes have been updated correctly. University Bursar would like to create a process that notifies the departments that the annual process has started, accepts their updates via an online tool, then updates Banner with the information while tracking remaining unchanged codes. Additionally, we would like a BPI engagement to review the current process and determine the best direction forward.</p> <p>Benefits:</p> <ul style="list-style-type: none"> * Creating an online system for term-based detail code data to be processed through would allow for - * Gathering concise term-based data up front * Timely status feedback for requesting units * Dashboard for each partnering unit to efficiently review term-based updates when it is their turn to review * Streamlined C-FOAPAL interface with banner * Automatic upload of a feeder * Reduced manual errors * Decrease overall timeline for all units involved. 	Project has been approved by ITPC and awaiting resource availability and AITS prioritization.	June 2023	December 2023	Finance	Bill Patterson
ITPC-0707 Integration strategy with iBuy & relevant dept systems	<p>The university has been focused on making iBuy the centralized purchasing tool for the system. As we have gone through this process to integrate iBuy to Banner, we have identified shadow systems that are used for purchasing, accounting, and receiving. Upon further investigation, the use of shadow systems in conjunction with iBuy creates manual work for the related departments. By integrating these solutions, we plan to remove these manual efforts.</p> <p>We will conduct a proof-of-concept (POC) for this integration using two departments and two different shadow systems to verify this can be successful. We have selected Facilities Services at UIUC (F&S) and the Illini Union Bookstore and Retail Operations at UIUC to test the integration. The goal will be that the development work can be re-used for future areas interested in the integration to remove manual work.</p> <p>Expected Benefits: Eliminating significant time manually entering requisitions, purchase orders, and invoice data in respective systems. Improve data accuracy by leveraging electronic data vs. manually entered information.</p>		August 2024	March 2026	Finance	Aaron Carter, Kelly Block, Maria Thompson, Tod Petrie, Brad Trankina

In Queue

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
SYS-0022 Analysis of potential Banking Disbursement Services RFP	<p>Our current bank is BNY Mellon. We have been with them since 2006. Senior management has determined it to be beneficial to consider changing the incumbent bank, and review and evaluate alternative solutions and products that are available in the market. The primary goals of this effort are to solicit proposals relating to banking services for the following disbursement activities:</p> <ul style="list-style-type: none"> * University Payroll account to disburse payroll direct deposit (ACH) to university employees at all locations * University Payables disbursement account for general disbursement activity for the University including check, ACH * Student Refunds account to make ACH payments for student financial aid refunds * Funding account to facilitate the daily funding of disbursement activity for the accounts referenced above. * Review and evaluate new services and products vendors may have to offer to improve efficiencies and operations of the System <p>Once it is determined what services a new banking service can offer based on the RFP output, we will decide what current processes could be impacted and what services we will be requesting from that new banking service. An implementation proposal will be submitted to PAPP and ITPC for the implementation of the new banking service as well as any new services or adjustments to current processes.</p>		February 2023	August 2024	Treasury	Nichole Roberts, Sarah Crane

Closed

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
ITPC-0670-A Implement Data Virtualization to integrate data sources	<p>Data virtualization provides the ability to virtually connect data from multiple locations and present it as one data source. This means that data can quickly and easily be accessed and integrated regardless of where it resides or how it is stored including database, APIs, files, etc. Data virtualization also provides capabilities to quickly curate data to meet specific analytics needs reducing the amount of data movement work needed. This results in easier and faster access to information which leads to enhanced decision making based on actionable insights.</p> <p>This effort will focus on the following:</p> <ul style="list-style-type: none"> * Implement Denodo for data virtualization. * Deploy a logical data warehouse as the foundation for a data fabric. * Establish the data virtualization service. * Create a support model for assisting clients. * Create training to educate university data users on how to use the data virtualization service. 	<p>Changed Status from In Process to Completed. Project Implementation Completed, Additional work ongoing in Project: ITPC-0670-B</p>	January 2023	August 2024	BI PM	Kelly Block , Nyle Bolliger, Dimuthu Tilakaratne
ITPC-0671 Analysis to ensure accurate Commodity Code usage	<p>Analysis to determine the best path forward to update the NIGP commodity codes in the FTMMCOMM table and mirror these updated codes into iBuy for use on purchase requisitions. These codes are updated regularly, so the analysis will need to determine the frequency of necessary updates in addition to establishing a procedure for maintaining the same codes in Banner and iBuy.</p>	<p>Changed Status from In Process to Completed. Received Final Approval from Project Sponsor. Will continue with next steps to create implementation Projects.</p>	November 2022	July 2023	Finance	Aaron Carter, Daniel Szajna
ITPC-0625 FABweb Re-design and Biennial Inventory Enhancements	<p>This project aims to improve the property accounting process and user experience for all University users. Upon project completion, new features and fixes will be introduced to FABweb, Biennial Inventory (BI), and the Surplus Warehouse Inventory System (SWIS). In addition some technologies utilized by UPAR will also be developed, so that all University users may be better supported.</p> <p>Benefits: Assist the department units in being more effective and identify and correct discrepancies in their equipment records Aid in reducing the University recurring negative audit findings related to equipment Assist by easing the burden on University faculty</p>	<p>Changed Status from In Process to Completed. Go-live successfully executed on 2/1/24 instead of 1/31/24, since 2/1 was a Thursday and a normal Change Control day. Production and Training environments updated to reflect functionality that was included in this ITPC. ITPC can be considered complete.</p>	March 2021	February 2024	Finance	Brent Rasmus
ITPC-0648 OBFS Website Redesign: Development & Implementation	<p>This project will act on the analysis conducted during the phase-one project (SYS-0013) to create and test a final design for the new business and finance website, develop the site according to the design, and implement the site for user access and use.</p> <p>Benefits:</p> <ol style="list-style-type: none"> 1. Focus the information that is displayed on business and finance subject areas and clearly align it with the CFO Office. 2. Confirm the scope of the topics and level of information that should be presented on the website as a result of the new organization structure and reflect the new relationships of organizations that have moved to the Universities. 3. Reface the website information to update the look and feel and improve navigation and search. 	<p>Changed Status from In Process to Completed. Changed Health from Green to None. Changed Percent Complete from 90% to 100%. Project was completed successfully</p>	April 2022	March 2024	Finance	Karen Greenwalt, Brent Rasmus, Kelly Block
ITPC-0649 Implement Internal control updates due to audit finding	<p>Recently, internal audits uncovered several scenarios where University employees used access to multiple systems to conduct fraudulent transactions, using a multitude of purchasing and payment mechanisms and altering requests, invoices, and property accounting records as needed to avoid detection. In January 2019, a team of system and university experts in procurement, accounts payable, fixed assets, systems, and internal auditing were convened to perform an extensive analysis of system access roles and define the role combinations that present risk to the U of I System if duties are not appropriately separated. That analysis culminated in a final report that was completed in December 2019 with seven recommended long-term solutions, as well as some short-term solutions. The short-term scope has been completed and now we must move on to the long-term recommended solutions.</p> <p>Based on lessons learned during the short-term implementation project and given the large scope of the recommendations from the analysis team, we are recommending that the internal controls initiative be managed as a program. This approach will allow for greater coordination of the various components of the initiative, as well as increased flexibility and agile implementation of projects.</p> <p>Benefits: Address internal controls and segregation of duties discrepancies in the purchasing, payables, fixed asset, and systems access process. By addressing these items, progress towards deterring possibly fraudulent transactions can be shared with the Board of Trustees, external auditing agencies, and grant agencies as needed. This program will also ensure that an exception process will be implemented to allow units to continue processing necessary business transactions without unnecessary disruption.</p>	<p>Changed Status from In Process to Completed. Changed Health from Green to None. Full scope of project completed successfully.</p>	December 2021	July 2024	Finance	Brent Rasmus

Closed

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
ITPC-0653 Analysis of ITFM software to manage service funds	<p>This initiative is to review and select a third-party vendor software which would assist our service centers (self-supporting units) in managing their service funds and performing rate calculations for the University of Illinois System. We are considering a few products as listed below but believe that Magic Orange or NICUS might be the potential solution. We are looking for a product that meets our defined requirements and would be cost beneficial to purchase.</p>	<p>Changed Status from In Process to Completed.</p> <p>Our review of potential IT Financial Management (ITFM) software as a rate calculation tool for self-supporting funds has been completed. After participating in numerous preliminary and follow up software demonstrations from ITFM vendors, we could not obtain a comfort level that the software platforms we reviewed would serve the current the needs of the University of Illinois System and make it easier for service centers' rate calculation processes.</p> <p>Also, since we could not obtain a comfort level that the software would meet our rate calculation needs, we did not pursue quotes from the vendors. However, a couple of years ago NCSA's consultant, Thavron Consulting, guided us in estimating the financial investment and it was approximately \$500 thousand a year.</p> <p>We have outlined our observations, benefits, and concerns in a document stored in the project Briefcase area.</p>	January 2022	September 2023	Finance	Shelly Benson
SYS-0020 System Offices Skype to Teams Telephony Transition	<p>This project is focused on the efforts required to prepare the System Offices for the mandatory transition of VoIP services from Skype for Business to Teams. System Offices need to utilize calling and audio conferencing services, as part of their daily operations and University of Illinois Technology Services provides those services. Technology Services is transitioning all users to Teams for VoIP services. Currently, System Offices do have a variety choices for audio conferencing and video conferencing that include Skype for Business and Teams. However, the ability to use Skype for Business for any calling, Instant Messaging, voicemail, or conferencing will no longer be available after May 2023 and will be replaced by Teams as the primary calling and collaboration platform.</p>	<p>Changed Status from In Process to Completed.</p> <p>Changed Health from Green to None.</p> <p>Project completed</p>	May 2022	September 2023	Technology	Nyle Bolliger