In Progress

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
SYS-0021 Facility Condition Assessment Investigation	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.	Changed Percent Complete from 50% to 75%. Assessments are on schedule, and quarterly update meetings for university executives are held. A final report is expected in spring 2025.	September 2022	March 2025	Capital Programs	Mike Wilson
ITPC-0669 Replace aging Capital PM systems with a vended system	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. 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.	Changed Health from Green - On track to Yellow - At risk with corrective actions. The project team is working closely with the Capital Programs units at the universities to finalize projects that will need data migration into Kahua vs what can finish in PRZM. An addendum for our implementation partner, OnIndus has been finalized to assist in our final migration efforts as well as bug fixes and enhancements. The target for the final data migration will be the start of next calendar year, pending performance issues are resolved and steering committee and leadership feel more confident to make the final transition. Health has been changed to yellow to reflect this at this time. Vendors have been steadily moving through the affiliate NetID process and we are starting a communication campaign to prepare them for deactivation of old XAS authentications account on January 7th. We will be working to get them through the affiliate process ahead of that cutoff. Beginning January 8th, vendors will need a NetID to log into PRZM, VSA, and Kahua to work on projects with the University of Illinois System.	January 2023	February 2025	Capital Programs	Mike Wilson
ITPC-0699 Update BO universes to new format to continue support	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.	Moved to yellow status due to schedule risk. At this time with that large amount of universes that need conversion, Unbound reports planning, resource availability and regular BO Upgrades there is a high risk that the current schedule of universe conversions will not be completed by the deadline of 12/2025. Current focus is beginning the phase 1 process of internal AITS universe Conversions and the continued planning and resolution of the Unbound Reports. Initial conversion schedule for all TAM supported areas is complete, and finalizing work on the bulk repoint/upload application. SOSS Change Management is working with us on appropriate scheduling, delivery options, creating knowledge base sessions & Video Guides	October 2023	October 2025	Data BI	Dimuthu Tilakaratne, Mike Wonderlich
ITPC-0677 Improve Sharing & Collaboration with Data Lake Services	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. The Microsoft Azure data storage solution will be used as the tool upon which the data lake service will be constructed. 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. 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.	CDW Workshops are continuing but we have not gotten a comprehensive breakdown of additional cost/new functionality that this will provide over Data Lakes. Most recently tested Data Masking and sharing between tenants. Team is coming to the end of our available sessions. Dimuthu is working with Scott & Tim from CDW on how to best utilize our remaining hours. Team wants to walk through the process of setting up our pilot Data Lake and we want to know more about Purview to Fabric relations. We have recently identified a good candidate for the Pilot Fabric Data Lake. Working on testing connections to Data Lakes with Denodo and working to get Pilot data out for initial Data Lake Structure and creation. Beginning internal discussions around certifications and additional training for Microsoft Fabric and One Lake. Team is getting a list together of Training/ Certifications required for delivering Azure Storage. (Azure Fundamentals, Azure Administrator Associate, Azure Data Engineer Associate)	July 2023	March 2025	Data BI	Dimuthu Tilakaratne

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
ITPC-0678 Provide connections to data with data movement tool	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. 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. 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. 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.	POC for Rejects process in Talend: Call with Informatica about On Prem PowerCenter and Cloud Services completed. Received a quote for a small pilot of Informatica Cloud. Currently the team is testing this system with their 30 day trial option which is free. Colleen and team will document the experience of using it; If it is much more positive than using Talend, We will reach out to get an estimate from Informatica of what the cost will look like over a few years where we run Power Center on premise and Informatica Cloud, with the possibility of then transitioning to fully Informatica cloud. Implementation is considered complete but waiting on Cornerstone/Chrome River project to be pushed to Production to confirm. Implementation project is remaining open to Continuing refining training and documentation for users. Applied Java 17 Patch on Remote Engine and testing is successful, but did not resolve bug issue as hoped.	July 2023	December 2024	Data BI	Dimuthu Tilakaratne, Kelly Block
ITPC-0681 Automate billing process with new GAR Bill Banner table	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. Currently details of GAR bills are maintained only in the standard Banner lis files and pdf output of the process. 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.	Analysis of cloud data virtualization tools such as Denodo is complete. It was determined that Denodo would not be a good tool for this effort. The agreed upon strategy is a Java application that will parse the lis file and load the required data into an Ethos custom table. Access of the table would be via direct SQL against REPTPROD. We were also able to set a estimated timeline for completion of 12/31/2024. No changes since last update.	May 2024	December 2024	Finance	Erin Herrick
ITPC-0683 Self-Service page for student access to sponsor data	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. 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.	Changed Percent Complete from 15% to 50%. Feedback and changes continue as we look to improve the experience card for Student Sponsor Billing. The team is ready to request QA accessibility testing to ensure that we are compliant with university standards. We are on target to complete this project before the end of the year.	May 2024	December 2024	Finance	Erin Herrick

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
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 Yellow - At risk with corrective actions to Green - On track. A solution for the PHI issue has been identified. We are working to do a change order with Jaggaer to restart the DMR project. We are also working to update the project plan to show new project duration. We expect to restart during the week of January 6th and will have a new target for go live soon	July 2019	October 2025	Finance	Gloria Keeley Michael Bass Dr. Ghosh Janet Parker Jerry Joseph Mike DeLorenzo Brent Rasmus Kelly B
ITPC-0645 Deliver improved financial data with FPPM Dashboard	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. 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.	The first iteration of the dashboard has completed initial user testing. Team has completed updating requirements with subject matter contacts on logic changes. Changes to the EDW source table for the dashboard are in process. Then dashboard visualizations will be updated to reflect the logic changes. Another round of user testing will occur when updates are complete. The updates to the My-UI-Financials application for the new dashboard are in Test environment.	August 2022	August 2025	Finance	Kelly Block, Brent Rasmus
ITPC-0593-E S2P Card Program Project	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. This request is for approval to complete the following: •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 38% to 40%. Changed Health from Yellow - At risk with corrective actions to Green - On track. 2nd phase of Wireframe usability testing has completed. Data model is complete and database build will start by end of this week. We have reached out to the SecApp team to request the CMP resides in SecApp v1. Current health status: Marked green due to completion of data model. Team still estimates for this to be in production by end of Q2 2025.	January 2024	June 2025	Finance	James Martinie, Darren Strater
SYS-0023 University Vehicle Accident Reporting Process Assessment	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. 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.	Changed Percent Complete from 80% to 90%. The final report is almost complete and we are planning to send it over to the project sponsors by end of November. The sponsors will then determine any next steps in correlation with the recommendations that we have made.	October 2023	December 2024	Finance	Bill Patterson, Ginger Velazquez
ITPC-0700 Commodity Codes clean-up for improved reporting	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.	Changed Percent Complete from 30% to 45%. Project stakeholders have made the decisions to mandate the use of NIGP codes. Currently, the project team is now creating scripts to terminate rogue codes and prepare for mass update of current NIGP codes to various department code bases.	January 2024	December 2024	Finance	Aaron Carter, Dan Szajna

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
ITPC-0674 HR/UPB updates due to new SURS Pension Admin System	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. Expected Benefits: Faculty will have accurate reporting of SURS eligibility and benefits to SURS / Meet the requirements of the new system	Design documents are in progress for the Payroll and Bio-Demographic files. Database objects are being inventoried and new objects documented. SURS has granted UPB and AITS access to the test system. Spec documents are moving slowly due to current higher priority projects.	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 mvrs, procedure for reviewing mvrs, potential storing of PII, and development of process/policy for how adverse mvrs will be handled.	The committee has developed a "draft" policy which is currently be reviewed by the insurance carrier. Once we receive the ok from the underwriter the policy will be sent out for open comment period. The committee is also currently working with the vendor, HireRight, to determine steps for implementation of ordering process, billing, etc. The date has been moved out to early 2025 because the policy requiring this update has extended the period to implement this policy and procedure.	June 2024	April 2025	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.	Changed Percent Complete from 33% to 66%. All vendor demos are complete and the team has chosen ConvergePoint and Onspring as the top two contenders. I am currently working on getting quotes and am working with purchasing on next steps. Need to decide how the implementation project will be proposed and managed.	June 2024	December 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.	Changed Percent Complete from 95% to 96%. PPM Reporting: Decision Support is working on table structure and data loads in the development environment. Once complete and validated, work will move to the QA environment where the new Business Object universe will be created. Proposed deployment date is 1/23/25, available to users on 1/24/25. Group Management: iPaaS pilot efforts are still in progress with TDX consultant. Based on POC completed during pilot by AITS and TDX consultant, dynamic group updates is possible based on certain attributes. This POC may be a viable solution for dynamic group membership that could be used for customer visibility into services available to them based on certain features. This will be determined in near future. The overall iPaaS participants are working with their IT LT members to bring information and use cases so that in late November, IT LT can better determine what licensing structure to move forward with for TDX.	October 2019	February 2025	Technology	Kelly Block, Cynthia Herrera Lindstrom,Tulio Llosa, Greg Gulick
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.	ARM Architectural Foundation Updates: (for a simple request) The add/edit access redesign development is in progress and reviewed by UX/DEV. There are some small changes needed. UX design has begun with mock-ups for System Access Management requirements (what they can view and tasks they need to complete) when a request is sent to their queue. The goal is to share the first mock-up with SAM this Thursday for feedback. Work on profile shared settings continues in development. Development of Banner provisioning is about 75% complete. Backlog refinement continues with the analyst group - working on audit/certifications and ARM Resources (documentation/training) stories and acceptance criteria. New Resources for UX (Kelly) and DEV (Serhiy and Derek) have tasks assigned this Sprint and the new UX/DEV weekly working session has been very valuable.	August 2021	March 2028	Technology	Kelly Block, Karen McFarlin

Name	Description	Status Comments	Start	End	Functional Area
ITPC-0708 Capital Programs' Kahua Application Integrations and Reporting	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. 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	Will start soon with EDW efforts and bring in more integration focuses.	TBD	TBD	Capital Programs
ITPC-0632 Outsource University Check Printing	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. •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.	Changed On Hold Until from Mon 10/3/22 to Wed 3/1/23. Will hold off on starting effort until other potential projects scope/goals are defined to determine if there is need for this effort.	TBD	TBD	Finance
ITPC-0679 New page for GAR customers to make updates in Banner	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. 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. 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.	Project has been approved by ITPC and awaiting resource availability and AITS prioritization.	TBD	TBD	Finance
ITPC-0680 Streamline State Offset Process with new tables & form	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. 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. Benefits: 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.	TBD	TBD	Finance

Name	Description	Status Comments	Start	End	Functional Area
ITPC-0682 Automate SAR bill format to reduce Bursar process time	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. 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. This project would have a number of Benefits for Bursar and Students: 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.	TBD	TBD	Finance
ITPC-0684 Automate & track annual term-based detail codes process	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. The manual process includes having to: 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/UIS) and (Fall, Winter, Spring, Summer and a general Academic Year for UIUC); 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. Benefits: 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.	TBD	TBD	Finance
ITPC-0707 Integration strategy with iBuy & relevant dept systems	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. 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. 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.	Awaiting the implementation of digital mailroom.	TBD	TBD	Finance

Name	Description	Status Comments	Start	End	Functional Area
SYS-0022 Analysis of potential Banking Disbursement Services RFP	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: 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 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.	Waiting for Treasury Services to restart effort.	TBD	TBD	Treasury

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
ITPC-0670-A Implement Data Virtualization to integrate data sources	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. This effort will focus on the following: •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.	Changed Status from In Process to Completed. Project Implementation Completed, Additional work ongoing in Project: ITPC-0670-B	January 2023	August 2024	Data BI	Kelly Block , Nyle Bolliger, Dimuthu Tilakaratne
ITPC-0649 Implement Internal control updates due to audit finding	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. 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. 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.	Changed Status from In Process to Completed. Changed Health from Green to None. Full scope of project completed successfully.	December 2021	July 2024	Finance	Brent Rasmus