**System-PAPP Status**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
<th>Status Comments</th>
<th>Start (Month/Year)</th>
<th>End (Month/Year)</th>
<th>System-Functional Area</th>
<th>System-Sponsors</th>
</tr>
</thead>
</table>
| ITPC-0670          | 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. | January 2023 | November 2023 | BI PM | Kelly Block, Nyle Bolliger, Dimuthu Tilakaratne |

- **Changed Percent Complete from 15% to 20%.**
- **Accessibility concerns with Denodo have been resolved.**
- **Procurement Processes are in progress – Contracts have been redlined and we are continuing finalization. Current expected date for tool is 7/5.**
- **Updated WBS to reflect schedule changes due to prolonged procurement.**
- **Contracting resources/Implementation Partners have sent in response bids and the grading/approval process is in progress. Waiting to receive resumes in addition to original bids.**
- **Security and retention policies have been researched; work will begin on Governance/Policies/Procedures once procurement is completed.**
- **Early Adopters Identified/Engaged SOSS for Service & Support on Change Management.**
- **Talked with ICC to prepare them for testing API Capabilities.**
- **Scheduled formal kickoff meeting and are working on creating the agenda and next step tasks.**

**Next Steps:**
- Install/Configure software
- Continue to work through and refine Administrative, Governance, and Security processes
- Work with Denodo for Client Onboarding and Early Adopters for Pilot Programs
- Continue working with SOSS on Communication plans and outreach
- Continue to refine WBS and project schedule
- Pending Security Pre-Planning Session detail meeting will setup larger security discussion with Jared, Chris, Phil Ryder, Joe Barnes, SISO’s (Security Officers), and normal group. Will need detailed agenda from Dimuthu.
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.

Changed Status from Approved (Not Started) to In Process.
Changed Health from On Hold to None - No health has been set.
0% complete, updated Wed 7/5/23 8:17 AM by John Olivero

Project has been approved by ITPC and LT, will officially start once Azure Data Lakes service is confirmed
Mike Wonderlich submitted the form to Technology Services to request the Azure subscription to support the UofI Data Lakes Service. Jeff Hannum has provided the CFOP. Chris, Nathan and Mike will be the administrators of the subscription.
Created initial stakeholder list will upload to Teams channel
Setup Data Lakes planning meeting to create Project Plan
Detail Tasks
Setup Security Pre-Planning Session

July 2023
January 2024
BI PM
Dimuthu Tilakaratne

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.

Setting up Security preplanning sessions, Updating Project Plan tasks and formal kick off.

July 2023
March 2024
BI PM
Dimuthu Tilakaratne, Kelly Block
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 Percent Complete from 7% to 9%. We have an internal AITS kick-off with project resources 7.12.23. Have started meetings with OnIndus and Kahua for data migration, product demos, and authentication related requirements. Will meet with Tech Services to discuss SSO options with Kahua's existing capabilities and come back with Kahua 7.13.23 to discuss best next steps.

After we begin investigating integration requirements and mapping provided by OnIndus for migrating data, we should have a better idea on what the targeted schedule will be.

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.

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

Developers are finishing up the last major functionality called Update Existing Assets and it should be ready for initial testing next week. Property Accounting will be available during late August to test, so for the next 1.5 months we will finish internal testing, accessibility testing, vulnerability, job aids, etc. to wrap up the project.

January 2023  March 2024  Capital Programs  Mike Wilson  

ITPC-0669
Replace aging Capital PM systems with a vended system

ITPC-0625
FABweb Redesign and Biennial Inventory Enhancements

Changed Percent Complete from 7% to 9%. We have an internal AITS kick-off with project resources 7.12.23. Have started meetings with OnIndus and Kahua for data migration, product demos, and authentication related requirements. Will meet with Tech Services to discuss SSO options with Kahua's existing capabilities and come back with Kahua 7.13.23 to discuss best next steps.

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March 2021  September 2023  Finance  Brent Rasmus
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<thead>
<tr>
<th>Project Code</th>
<th>Project Name</th>
<th>Description</th>
<th>Start Date</th>
<th>End Date</th>
<th>Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITPC-0593-A</td>
<td>Optimization Project</td>
<td>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.</td>
<td>July 2019</td>
<td>October 2024</td>
<td>Finance</td>
</tr>
<tr>
<td>ITPC-0648</td>
<td>OBFS Website Redesign: Development &amp; Implementation</td>
<td>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. Benefits: 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.</td>
<td>April 2022</td>
<td>December 2023</td>
<td>Finance</td>
</tr>
<tr>
<td>Changed Percent Complete</td>
<td>35% to 40%. We have conducted our final tree test with our user group and are now analyzing the results. Preliminary review has shown the results seem to support our new information architecture. WE are also in the final stages of configuring Webtools to replace the Manage News app that supports the News Center. Work is ongoing in reviewing content with stakeholders and designing new webpage templates.</td>
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Karen Greenwalt, Gloria Keeley, Brent Rasmus, Kelly Block
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.

December 2021

April 2024

Finance

Brent Rasmus
**ITPC-0653**  
**Analysis of ITFM software to manage service funds**

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.

**IT Financial Management (ITFM) software products:**
- NICUS Software - https://www.nicus.com/
- Magic Orange - https://www.magicorange.com/
- Upland Software - https://www.uplandsoftware.com/
- Apptio - https://www.apptio.com/company/

January 2022

**Changed Percent Complete from 88% to 89%.**

After a review of the Magic Orange product, the team has determined that their solution is not the right product for us. Magic Orange has been advised we will not be moving forward in the process with them. The team went through a presentation with Apptio and did like some aspects from the presentation. They have had access to Apptio’s solution and are taking a look at the product. Apptio will set up an instructor-led session with Andre, Judah, and Fred. They are also going to set up a separate meeting with the Accessibility team. Additional meetings with the third vendor have yet to be scheduled.

February 2023

**Finance**

**Shelly Benson**

**ITPC-0671**  
**Analysis to ensure accurate Commodity Code usage**

Analysis to determine the best path forward to update the NIGP commodity codes in the FTMCOMM 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.

**November 2022**

**January 2023**

**Finance**

**Aaron Carter, Daniel Szajna**

**Presented to iBuy/Jaggaer Team about Final recommendation. No major issues/Dissent, moving forward with finishing up Final recommendation paperwork to accompany presentation. Once complete will present to IT Leadership.**

**Finance**

**Shelly Benson**
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 of 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.

We have a large number of remaining tasks to help System Offices prepare their different phone hardware preparations, resource account or unique phone account type preparations, and software testing and upgrades for call centers. Most feedback from whole units and pilot users that have been part of early migrations have been positive regarding their migration experience. We anticipate a little clean up may be likely after the migration for some units as well.

We do have some UIC HR staff tied to AITS Pinnacle accounts that have migrated to Teams and some that remain as Skype during this migration. We have met with UIC HR and they are currently working on providing Jabber soft-phone to their staff to allow remote and hybrid communication capabilities. Once UIC HR reaches out to let us know that is complete, we will disconnect their AITS related phone lines.

Team completed work on adding Student Banner profiles to ARM. EDW Student profile work continues. Validation of the entered profiles on the View Access Screen is the next step. Design of Request Access Screens is continuing into the next sprint. Functional Sub-team is now working on a revamp of the HR profile hierarchy (working with Mary Combs and Cheri Gorrell). Finance and Student Hierarchies are complete. Development is starting preliminary work on workflows and approvals in parallel with development on new profiles when needed. Sessions to delve into the high level work breakdown structure to ensure a complete picture of the work is represented has begun. We will also be reviewing a list of applications, determining a mechanism to retrieve feedback from the focus group to understand and identify MVP for View Access.
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.

Progress is starting to continue. The Grouper team has turned some focus to UIC related data sources for next phase of group management functionality. Production update related testing for integration verification and credential confirmation complete.

The reporting scope remains in queue for DS for PPM related data from TDX.

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.

The Treasury office has had other work take precedence of late and there has not been much progress recently. They are still in the process of reviewing the requirements collected from each department, evaluating them, verifying what are actual needs and what are the wants, and beginning to formulate them into questions for the RFP.

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- February 2023
- August 2023

Nichole Roberts, Sarah Crane

Kelly Block, Cynthia Herrera
Lindstrom, Tulio Llosa, Greg Gulick