

In Progress

Name	Description	Status Comments	Start	End	Functional Area
SYS-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>They are almost complete with the initial scope. There was an amendment to expand the scope of services for UIC to increase the maximum contract value from approximately \$86,000, to \$2,999,988. We are still expecting a report with an executive summary by spring 2025 and have had one review round for its first draft. With this expanded scope the updated finish dates moves from March to June.</p>	September 2022	March 2025	Capital Programs
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>	<p>Initial requirements meetings for EDW/BO reporting are complete. Waiting on feedback from users groups on the requirements documentation. Continuing to update required data elements documentation with sourcing information. Will begin data analysis once requirements are complete.</p>	July 2024	April 2026	Capital Programs
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 89% to 91%. The final migration of Capital Program projects currently active in our in-house applications PRZM and FCPWeb to Kahua is planned for early March. Communications with specific milestone events leading up to the migration have started with internal and external users. There have been two pilot migrations up to this point and all new projects have started in Kahua. There are a handful of projects that are near substantial completion or recently completed that will finish out their warranty period in our legacy applications.</p>	January 2023	February 2025	Capital Programs

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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. 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.</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>	Team has begun a trial of Informatica cloud to test it and document advantages and disadvantages. We will decide on whether to switch from Talend after that. Applied Java 17 Patch on Talend Remote Engine and testing is successful.	July 2023	March 2025	Data BI
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.	Updated status from Yellow to Green. Initial schedule concerns have been addressed as the known end support date for the UNV universes has been extended, giving the project team additional time to complete. Current focus is continuing the phase 1 process of internal AITS universe Conversions and the continued planning and resolution of the Unbound Reports. Conversion schedule for all TAM supported areas is complete & schedule will be updated as needed. Finalized work on the bulk reimport/upload application. Continuing to review documentation and communications with the SOSS Change Management team for all impacted users	October 2023	October 2025	Data BI
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. 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.</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>	Changed Percent Complete from 30% to 35%. Updated project to reflect updated schedule and hours. New end date is October, and hours have been bumped up from 460 to 700 total. We are working on our pilot of the data lake using Azure Fabric with AITS data. We are starting with the high-level tasks of security, capacity model, and multi-tenant management. Requesting assistance from Technology Services with Tenant Administrative settings. Continuing 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
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.	We are targeting a go live for Digital Mailroom (DMR) on 3/6/25. Suppliers will be moved from Exela/BDM to iBuy in waves. Communications will go out to users and BMG groups starting in January about what to expect. The key message to users is that it's about a change in invoice presentment (where the invoice is submitted and where the invoice is processed, and getting invoices into iBuy - which is a more user friendly experience and has workflow). The data we need entered by them on the requisition has not changed. It's business as usual. Also, the iBuy invoice process should be familiar to folks if they have ordered from a catalog like Dell, CDW, Fisher, or Office Depot.	July 2019	October 2025	Finance

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<p>SYS-0023 University Vehicle Accident Reporting Process Assessment</p>	<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 90% to 95%. The final report was completed in December 2024, and we will be meeting with Dr. Ellinger at the end of February to go over the recommendations and potential next steps.</p>	<p>October 2023</p>	<p>February 2025</p>	<p>Finance</p>
<p>ITPC-0645 Deliver improved financial data with FPPM Dashboard</p>	<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>	<p>Project go live approval and prep meetings set up for the first iteration of the FPPM dashboard to go live. Proposed release date is Tues., 2/4. This is subject to change based on outcome of approval meeting and locking down enhancements.</p>	<p>August 2022</p>	<p>August 2025</p>	<p>Finance</p>

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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>Changed Percent Complete from 45% to 51%. Development of GAR bill table continues as we are just over 50% complete. Data has been populating into the table and logic is being applied. As we finalize columns that we want to see in the table, it was mentioned that we have to delete and rebuild the table each time we make adjustments. End of Q1 estimated completion date is still on schedule. Decision has been determined that there will not be a GUI attached to this table and data will be pulled through REPTPROD.</p>	May 2024	March 2025	Finance
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: *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</p>	<p>Changed Health from Green - On track to Yellow - At risk with corrective actions. Development is still in progress and is approx. 25% complete as it is dependent on UX design components. Met with Project Sponsors and stakeholders to discuss Over Schedule and Over Budget reasons. The original estimates were provided with some missing context as to the level of effort required to build this application from ideation. We have added 1500 hours to the estimate and the new estimated completion date is 11/01/2025.</p>	January 2024	November 2025	Finance
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>Specs are being developed for the Payroll File. A meeting is scheduled for early March to walk through the specs with the developers.</p>	March 2023	October 2027	HR
SYS-0024 Motor Vehicle Record (MVR) Ordering Process	<p>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>	<p>The committee has developed a "draft" policy which will be sent out for an open comment period. The committee is also currently working with the vendor, HireRight, to determine steps for implementation of the ordering process, billing, etc. The end date has been moved out to June 2025 because the insurance carrier requiring this update has extended the period to implement this policy and procedure.</p>	June 2024	October 2024	Other

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ITPC-0620 Replace SecApp to improve access request / provisioning	<p>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.</p>	<p>ARM Architectural Foundation Updates: (for a simple request) The add/edit access redesign development is complete. The team has detailed out requirements for the reconciliation page. UX is working on updates. The UX HTML for the System Access Management initial provisioning requirements has been delivered to the developers have begun coding. Testing of profile shared settings continues and the new approach will be shared with the focus group next week. Development of Banner Student provisioning is complete and testing has begun. Work on the EDW HR VPD profile continues with the current sprint. HR Banner profiles are being manually entered in the DEV environment.</p> <p>Team will use the first quarter to re-evaluate team velocity, priorities and create a more realistic timeline.</p>	August 2021	March 2028	Technology
ITPC-0605 Impl ITSM(IT Svc Mgt) and PPM(Proj Mgt) Cloud Solution	<p>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>	<p>Changed Percent Complete from 96% to 97%. PPM Reporting: TDX Project Reporting in EDW is nearly finished being validated by DS internal testers. User acceptance testing will begin on Feb. 4. Proposed deployment date is March 4, available to users on the 5th.</p> <p>Group Management: iPaaS proven capabilities for dynamic group management will be leveraged to meet this scope item now that evaluation of iPaaS for licensing usage has completed.</p>	October 2019	February 2025	Technology
ESGC-0725 Vended Application Testing and Remediation for ADA Title II Regulation Updates	<p>The Department of Education has issued web accessibility regulations pursuant to Section 504 of the Rehabilitation Act, which prohibits discrimination in all public and private programs receiving federal financial assistance. This project will bring highly used AITS-developed applications into compliance with Federal Title II regulations. This project will bring AITS-supported vended applications into compliance with Federal Title II regulations.</p> <p>Expected Benefits: Ensure AITS-maintained vended applications compliant with the updated mandate / Improve accessibility of AITS-maintained vended applications for our faculty, staff, and students</p>	<p>Changed Percent Complete from 0% to 3%.</p> <p>The process for vendor outreach is currently being established with Procurement, who are also working with Legal for approval on the Letters to Vendors. Procurement is also working to assist with Vendor contacts, as well as contract information that will need to be referenced. Outreach was going to be done by Risk Totals alone, but will now be grouped by vendor. So instead of beginning with the 29 applications with the highest Risk, we are also grouping them by Vendor. Outreach will begin with these six vendors - Nelnet, Adobe, CollegeSource, Ellucian, Ad Astra, and Quali - with a total of 25 applications. Pending updates to the process, all other applications will be grouped by vendor and communications will go out in batches/phases.</p> <p>Once internal contact information is available, a meeting with Product Managers will be scheduled to review the project and overall process. We will ask for their feedback and make final changes to the process before beginning vendor outreach.</p>	February 2025	December 2029	Technology

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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>	Awaiting the implementation of digital mailroom.	Finance
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. 	Status remains- Will hold off on starting effort until other potential projects scope/goals are defined to determine if there is need for this effort.	Finance
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: 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.</p> <p>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: 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</p> <p>Reduced manual errors</p> <p>Decrease overall timeline for all units involved.</p>	Project approved by ITPC and awaiting resources and outcome of two in-progress Bursar projects.	Finance

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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 approved by ITPC and awaiting resources and outcome of two in-progress Bursar projects to determine which next Bursar projects will start.	Finance
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.</p> <p>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 approved by ITPC and awaiting resources and outcome of two in-progress Bursar projects to determine which next Bursar projects will start.	Finance

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Name	Description	Status Comments	Functional Area
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> <p>Will eliminate the lag time between process updates for accounts.</p> <p>Will be more accessible to employees who can instantly access updated account data.</p> <p>Will eliminate the risk bad data or losing account information due to human error.</p> <p>Will improve data reliability being reported for quarterly report on State Offset which is being used in legal and audit purpose.</p> <p>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.</p>	Project approved by ITPC and awaiting resources and outcome of two in-progress Bursar projects to determine which next Bursar projects will start.	Finance
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.</p> <p>The primary goals of this effort are to solicit proposals relating to banking services for the following disbursement activities:</p> <p>University Payroll account to disburse payroll direct deposit (ACH) to university employees at all locations</p> <p>University Payables disbursement account for general disbursement activity for the University including check, ACH</p> <p>Student Refunds account to make ACH payments for student financial aid refunds</p> <p>Funding account to facilitate the daily funding of disbursement activity for the accounts referenced above.</p> <p>Review and evaluate new services and products vendors may have to offer to improve efficiencies and operations of the System</p> <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>	Same status: Waiting for Treasury Services to restart effort.	Treasury

Closed

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
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>	Full scope of project completed successfully.	December 2021	July 2024	Finance	Brent Rasmus
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. 	Project Implementation Completed, Additional work ongoing in Project: ITPC-0670-B	January 2023	August 2024	Data BI	Kelly Block , Nyle Bolliger, Dimuthu Tilakaratne
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:</p> <p>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>	The Student Self-Sponsor page is live in production and has been deployed to all students. If they have a sponsor, they will see the appropriate information. If not, they will not see anything. All students have the capability to remove the experience card from their homepage if they choose to do so.	May 2024	January 2025	Finance	Muna Bist
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.	New NIGP commodity codes are now in Production.	January 2024	January 2025	Finance	Aaron Carter, Dan Szajna

Closed

Name	Description	Status Comments	Start	End	Functional Area	Sponsors
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.	Full scope of work complete	June 2024	January 2025	Other	Karen Greenwalt