ADEA Release Highlights – February 2015

CATracks Active Projects

1. **Allocation Stewardship**
   Allocation Stewardship – phase 1, 2 (ASAC Priority) - Project for Donor Relations to store data on stewardees and beneficiaries of funds in CATracks

   **Phase 1: Complete**
   - All functionality is configured in CATracks
   - Training materials have been finalized

   **Phase 2: In Progress**
   - Data conversion and upload of Donor Relations' shadow database to CATracks
   - Notes types export enhancement (ability to get note text via export form) completed in February
   - Conversion of old CUFs allocations with existing NUFinancials accounts in progress
   - User training to commence when data upload to system is completed

2. **Names Issues**
   Project divided into 3 components (prefix/suffixes, first names, joint salutations/salutations)

   **Phase 1: Complete**
   - Phase 1 prefix, suffixes, mail names and salutations data cleanup completed with Feb release
   - Job aid drafted for GRS team Bio data entry what prefixes/suffixes to enter for each PhD, MD, GMER, GMEF degree codes during entity creation

   **Phase 2: In Progress (two parts)**
   - Part 1: Cleanup of Phase 1 data for married entities is underway
     - Goal is to get Phase 1 data cleanup on married entities into the March release
   - Part 2: Gathering additional names for SME subgroups for requirements gathering meeting on joint salutation and joint mail names issues
     - Functional/technical analysis in progress
     - Some documentation in progress
     - Regular updates are provided to SME weekly check-ins

3. **School Name Change SCS to SPS: Complete**
   All references to “School of Continuing Studies” have been replaced with “School of Professional Studies” in all areas of Alumni Relations and Development fundraising and reporting systems to reflect the official school name change that occurred in September 2014.

   Drop-down values in CATracks have changed from Continuing Studies to Professional Studies with approved variations such as School of Professional Studies.

   In addition to CATracks, changes have been made to:
   - Report 191 OARD Dashboard report
   - Ad hoc reports
   - BI reports and queries
• Our Northwestern
• ARD-BI users have received separate messages regarding changes to saved queries.

4. Prospect Strategies
Project to address University Overall Strategy for campaign goal tracking (includes navigation, visibility, training and policy rework)

Complete
• Functional analysis for CATracks prospect module
• Reporting analysis
• Meeting with Brock to review training and policy

In Progress
• Design and technical analysis is underway
• Meeting to discuss resolution scope and design solutions is pending

5. CATracks Load Improvements: Enhancements/Fixes
FASIS loads will resume in March
• FASIS Load: NU employees with external employment will have NU employment represented as secondary
  • For example, Law School instructor John Doe is partner at a law firm, so that is shown as his primary employment; NU employment is secondary
  • Mainly applies to faculty in Medicine and Law
• Place of Work codes from FASIS updated
  • March load will allow for more granular information in CATracks
  • “University Other” designation will be replaced by code for specific business unit (school name, for example)
• Ongoing
  • Improvements as new loads are added to the process
  • New sources of data require interface logic refactoring
  • Working towards frequent incremental updates

Other CATracks Enhancements

1. Data Clean Up

ADEA 716
Updates to CATracks Affinity Score Segments process to assist in targeting solicitations appropriately.

The affinity score segments process now:
• removes duplicate affinity scores from segments
• only counts paid member roles for club memberships
• excludes inactive clubs and committees
• only includes events with active or complete statuses
• adds the source code of EGT–Our Northwestern (Online Gift) for contact info updates

2. Report Security

ADEA-3130
Configure Report 202 (Online Gift Donations) for access by Development officers and fundraising support staff

• Report 202 is a canned report available in the CATracks reports menu that displays information about gifts made online through iModules.
• This report was previously only visible to GRS, but now may be leveraged by users across ARD, particularly the Annual Giving team.
Our Northwestern Release Highlights

Active Projects

Our Northwestern Directory and Search Project
The objective of the Our Northwestern Directory & Search improvement project is to deliver a better directory and search feature to our alumni, students, volunteers, career services staff and other audiences that rely on this function.

The project will entail two major phases:
• Phase 1: Parallel evaluation of two potential technical solutions vendors:
  • iModules and
  • Uprising Technology
• Phase 2: Implementation of the chosen solution

Phase one is in progress with a goal to have the systems for the potential vendors configured and ready for testing beginning the week of March 9.

Other Enhancements

ADEA-3387
User Interface fix to ensure that user-initiated email address changes do not interfere with user’s ability to receive email.

• Issues with the data exchange between Jive, CATracks, and iModules caused some alumni and staff users with valid email addresses to have their data overwritten with invalid addresses, causing them to be unable to receive email via iModules, the broadcast email tool of Our Northwestern.
• For most users, this issue was fixed with the February release.
• A Fix Pack scheduled for March 7 will address the issue for the remaining affected users