ADEA Release Highlights – March 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
   - Notes types export enhancement (ability to get note text via export form) completed in February
   - Conversion of old CUFs allocations with existing NUFinancials accounts completed with March release

   **Phase 2: In Progress**
   - Data conversion and upload of Donor Relations' shadow database to CATracks in user testing
   - 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 (Feb release)**
   - Phase 1: prefix, suffixes, mail names and salutations data cleanup for unmarried entities completed with Feb release

   - Training document completed for GRS team/Bio: training document addresses which prefixes/suffixes to enter for each PhD, MD, GMER, GMEF degree code during entity creation

   **Phase 2, Part 1: Complete (March release)**
   Prefix, suffixes, mail names, and salutations data cleanup for married entities completed with March release.

   **Phase 2, Part 2: In Progress**
   - Gathered additional names for SME subgroups for requirements gathering meeting on joint salutation and joint mail names issues
   - Two rounds of requirements gathering completed with representatives from Annual Giving, Major Gifts, LAW, FSM, KSM, Gift Planning, Athletics, GRS, Donor Relations, Library, NAA
• Research on correct etiquettes for mailing labels in progress
• Functional/technical analysis in progress
• Some documentation in progress
• Regular updates are provided to SME weekly check-ins

3. 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 impact analysis
• Current policy and training documents review

**In Progress**
• Design analysis is underway
• Resolution scope and design solution decisions pending

4. CATracks Load Improvements: Enhancements/Fixes

• FASIS loads will resume in March/April timeframe for May release
• ADEA-3436 – CLI now has safeguards in place so that "No Contact" entities do not have contact information (address, telephone, email) modified without initial review by Gift and Records Services. An extra safeguard was put in place to create a review batch whenever a load would modify the entity/biographic information for such an individual.

**Ongoing interface improvements**
• 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. Report Enhancements
   a. ADEA-3234: Bug fix addressing Officer Metrics displaying FY14 data instead of FY15
   b. ADEA-3074: Columns added to Entity Data Export Report for NU Loyal.
   c. ADEA-1970: New Gifts and Commitments amount now uses discounted amount for bequest and life insurance expectancy pledges. Inactive pledges are counted at the paid amount.

2. Completed Data Loads
   a. December 2014 Graduate load
   b. FY2015 second quarter national change of address (NCOA)
   c. Forbes list affluent ZIP code geocode update for FY15
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
  - Uprising Technology
- Phase 2: Implementation of the chosen solution

Northwestern Identity Services Gateway (ISG)
- Goal is to revamp the authentication process for multiple University systems with a vendor-supported solution.
- Internal kickoff complete and initial planning is underway.
- Requirements gathering has begun with ARD and the University Library (NUL).
- Initial vendor meetings have taken place.
- University Library will be the first to implement the new solution.