ADEA Project and Release Highlights – April 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 (March Release)**
   • All functionality is configured in CATracks
   • Training materials have been finalized
   • Notes types export enhancement (ability to get note text via export form)
   • Conversion of old CUFS allocations with existing NUFinancials accounts

   **Phase 2: Complete (April Release)**
   • Data conversion and upload of Donor Relations’ shadow database to CATracks
   • Allocation-related lookup labels corrected to conform to Financial Data Report Improvements conventions
   • Enterprise Reporting & Analytics team has begun work on stewardship query tool with Donor Relations; ADEA serving in a consulting role

2. Names Issues
   Project divided into 3 components (prefix/suffixes, first names, joint salutations/salutations). Regular updates are provided to SME weekly check-ins.

   **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**
   • There are 4 elements to the project phase
     o Finding an optimal solution to mail name format and implementation - In Progress
     o Data clean-up of existing joint mailing names/salutations based on decisions received from business owner - Design In Progress
     o Preparing CATracks system functionality for future processes (creating new entity/Creating new marital information) - Not Started
     o Cleaning up impacted clipboard reports and standardizing the adhoc reports - Not Started
   • Functional/technical analysis and development in progress
   • Detailed survey conducted to uncover issues with reports (Clipboard/Adhoc)
   • Detailed use cases uncovered for alumni preference rules
   • Research on mailing label etiquette in progress
   • Awaiting pending decisions from business owner on alumni rules/etiquette
   • Working on providing social/official mail name formats to users – awaiting decisions from business owner and next steps
3. Prospect Strategies
The Prospect Strategies Revisions project will enable approximately 75 Northwestern University Alumni Relations and Development gift officers to identify prospect strategies on prospect records “at a glance” within the CATracks entity record.

The strategy will:
- a. indicate active management of a prospect to gift officers and management;
- b. show that an overall financial target goal exists for the prospect;
- c. indicate the anticipated FY to reach the target goal; and
- d. identify key engagement points or hurdles to overcome in order to reach the goal.

Complete
- Functional analysis for CATracks Prospect module
- Reporting impact analysis
- Current policy and training documents review
- Resolution scope confirmed

In Progress
- Project charter under review
- Design analysis is underway with solution decisions pending
- Weekly project check-ins and design sessions underway

4. CATracks Load Improvements: Enhancements/Fixes
ADEA-3887 – A fix was implemented to prevent the creation of duplicate NetIDs from external sources such as SES and FASIS and also to prevent the addition of student/staff IDs to incorrect entity records.

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. ADEA-4066: Pledges without payments for over 90 days inactivated.

2. Report Enhancements
ADEA-1574 – The Alumni Education Report (195) was updated to include an entity’s total years of giving and consecutive years of giving, and to fix a bug that prevented some Officer Ratings from being displayed.

3. Completed Data Loads
- March 2015 FASIS load
- EMBA/IEMBA Kellogg student loads
- February and March 2015 iModules bounce-back emails were processed
Our Northwestern Release Highlights

Active Projects

1. Our Northwestern Directory and Search Project
   The objective of the Our Northwestern Directory and 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

4/28/2015 update:
   • Phase 1, Evaluation and vendor selection, is complete with Uprising Technology being chosen as search vendor.
   • Phase 2 is underway with the ADEA, ARD and Uprising teams focused on identifying and building must-have features and aimed at a late-May to mid-June soft* launch of the new search for ARD and Kellogg.
     **“soft launch” here means the new search will be live for users while continuing to be actively tested and improved

2. Northwestern Identity Services Gateway (ISG)
   The objective of the Identity Services Gateway project is to leverage a vendor-supported cloud solution to allow users to authenticate with University systems using either Northwestern University or external social credentials. The University Library will be the first department to implement the new solution.

Planning and Discovery
   • Current IDP issues identified with Our Northwestern Customer Support Specialists, GRS, and ARD to address in the project
   • User support roles and responsibilities discussed between vendor, Identity Services and ADEA
   • Authentication information and storage policy with the vendor discussed
   • Project tasks, resources, and initial cutover tasks with the vendor discussed

Next Steps
   • Begin detailed requirements gathering including a review of the user interface, registration and profile pages, branding, and theming
   • Finalize matching logic to ensure a successful match for users based on their student, faculty, staff, alumni, or parent status
   • Finalize project scope and timeline
   • Finalize escalation process for user support

Other Our Northwestern Enhancements
1. ADEA-1447: Club leaders will no longer see duplicate memberships when they run their paid membership reports (iModules issue fix)
2. ADEA-3680: Kellogg Admissions employees will now be able to view alternate address information in CATracks.
3. **ADEA-3681**: CATracks email records are not affected by a “no email found” designation in Jive for Kellogg addresses.