ADEX Project and Release Highlights – May 2015

CATracks Active Projects

1. 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 2: Complete
   • Data clean-up of existing joint mailing names/salutations based on business owner decisions
   • Finding an optimal solution to mail name format and implementation
   • Research on mailing label etiquette
   • Detailed survey conducted to uncover issues with reports (Clipboard/Adhoc)
   • Detailed use cases uncovered for alumni preference rules
   • Decisions received on alumni rules/etiquettes
   • Decisions received on social/official mail name formats

   Phase 2, Part 2: In Progress
   • Functional/technical analysis and development
   • Best Mailing Practices Policy draft
   • Updates to the Mailing lists Job aid
   • Final requirements and deliverables in scope finalized
   • User Acceptance Test Scripts
   • Preparing CATracks system functionality for future processes (creating new entity/Creating new marital information) – Not Started
   • Cleaning up impacted clipboard reports and standardizing the adhoc reports - Not Started

2. Prospect Strategies
   The Prospect Strategies Revisions project will enable 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
   • Resolution scope confirmed
   • Project charter finalized and sign-off obtained

   In Progress
   • Design analysis is underway with solution decisions pending
• Weekly project check-ins and design sessions underway
• Identified business rules and data conditions being verified with Prospect Management

3. CATracks Load Improvements: Enhancements/Fixes

ADEA-3426 – A fix was implemented to prevent external source address data with state, province and country information in the wrong fields (street address fields) from being added to the database.

ADEA-4506 – A fix was implemented to prevent loads from adding employment information (e.g. Vice President) to organization entities.

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. Completed Data Loads
   • March 2015 Grad Load
   • KAN Load
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

5/26/2015 update

   - Phase 2 of the Our Northwestern Directory and Search project is ongoing. ADEA is working with ARD and the vendor, Uprising Technology, to finalize and test the product for a June 15 ‘soft launch’.

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.

   Please note: This project has been rescheduled for Fall launch with work to commence in June

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