Adea Project and Release Highlights – June 2015

CATracks Active Projects

1. Names Issues
   The Names project will address names issues to respect donor/alumni preferences and better tailor communications to individuals with whom NU has a primary relationship.

   The project is divided into 3 components (prefix/suffixes, first names, joint salutations/salutations). Regular updates are provided to SME weekly check-ins.

   Phase 1: Complete
   • Data cleanup on mail names, prefixes, suffixes, salutation-unmarried entities

   Phase 2: Part 1 complete
   • Data cleanup on mail names, prefixes, suffixes, salutation-Married entities

   Phase 2, Part 2: Complete
   • UAT completed, and users signed off on all final deliverables below
   • Data clean-up of Joint names and joint salutation in accordance with the business rules established
   • Best mailing practices guidelines document- 90% complete, currently being reviewed
   • Communication emails to be sent on Thursday, June 25 to SSRs and ARDAC/ASAC participants
   • All deliverables going into the June 27th release

   Phase 2, Part 3: In Progress
   • Update CATracks to automate the joint names and joint salutation on the marital info in accordance with our new guidelines
   • Modifications to canned reports displaying mail names and joint salutations
   • Fixes to load process to fix issues related to joint names/salutations
   • Update to job aid “Special handling and Mailing Lists”
   • Communications to users

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
   • Identified business rules and data conditions verified with Prospect Management
In Progress
• Design analysis is underway with solution decisions pending
• Weekly project check-ins and design sessions underway
• Wireframes of design solution underway
• Development to update procedure logic to incorporate business rules in progress
• Test plan to validate design solution 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. Gift Fees Removal Project
Beginning September 1, 2015 gift fees will no longer be applied to gift transactions. The history associated with gift fees tied to gift transactions however needs to be retained so the historical information is not lost.

All new gifts received in August of the prior fiscal year and entered in CATracks in the same year, if processed in September of the next fiscal year should still fall into the prior fiscal year journals for accounting purposes. Automating this process will save manual work for accounting, and ensure transactions are placed in the correct balance sheets.

In Progress
• Research and requirements gathering- in progress
• Project charter completed, pending sign-off by SMEs
• Other documentation- in progress
• Weekly check in meetings being held to track progress of the project and address any roadblocks

4. CATracks Load Improvements: Enhancements/Fixes
• ADEA-4343: Improved handling of duplicate phone numbers
• ADEA-4238: Email Preferred indicator logic revised to better respect alumnus/constituent preferences.
• ADEA-3268: Defect in spouse match logic corrected to prevent student-parent loads from remarrying separated/divorced parents of current students.

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. The Parent-Child Export Report (Report 200) ADEA-4417: The Parent-Child Export Report (Report 200), used by the Parent & Family Giving Team, was updated to incorporate a number of biographic and giving data points about parents of current undergraduate students and undergraduate alumni.

2. Completed Data Loads
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 (complete)
• Phase 2: Implementation of the chosen solution (Uprising)

6/23/2015 Update
• The new search is live for Kellogg School of Management’s alumni; Kellogg launched on June 16.
• ADEA continues to work with ARD and the vendor, Uprising Technology, to prepare for ARD’s mid-July launch of the new search.

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 planning initiated in late 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