ADEA Project and Release Highlights – JULY 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 divided into 3 components (prefix/suffixes, first names, joint salutations/salutations). Regular updates are provided to SME weekly check-ins.

   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
   • Business rules and data conditions shared with Prospect Research & Management, PMO-ET for review & development of training & policy materials
   • Wireframes revised based on updated requirements

   In Progress
   • Development work to update Prospect Summary form logic and appearance in progress
   • Test planning, including identification of test cases and test data for validation of solution
   • Prospect Management and PMO-ET scheduling sessions to review business rules & design training content
   • Draft Appropriate Use policy for Strategies targeted by PRM for end of August/September

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-4065: Employees (faculty/staff) who retire from Northwestern University will be identified as such in CATracks.
   - ADEA-3269: Employees (faculty/staff) who take a leave of absence from Northwestern University, or return from such a leave of absence, will be identified with a new job status code in CATracks.
   - ADEA-4024/4942: Weekly processes to clean and audit mailing address and telephone preference (preferred indicator) data will be implemented, setting preferred indicators where appropriate and notifying GRS of entities who have become Lost (no Active mailing addresses) or Lost entities who should be Active (new mailing address added). These processes are meant to supplement the streams of data handled via CLI.

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

5. **CATracks Upgrade**
The Constituent and Affinity Tracking System (CATracks) v9.10 Upgrade project will upgrade the Ellucian Advance application that supports CATracks functions, from version 9.8 to version 9.10. This upgrade will enable Northwestern University to sustain Ellucian support for the application, leverage improvements offered in the newer version, and identify opportunities to reduce internal effort to maintain the application by retiring customizations.

**Complete**
- Three phase high level project plan defined: 1) Scoping, 2) Build & Test, and 3) UAT and Implement.
- Phase 1 targeted for completion by 9/30/15; phase 2 targeted for completion by 1/31/16 and phase 3 target date TBD (spring 2016).

**In Progress**
- Phase 1 is underway
- Advance overview sessions for ARD & ADEA have been calendared
- Working fit/gap sessions for GRS & PRM are underway and planned through end of August
- Additional ARD sessions in planning
- BIE test planning (for ADEA) nearly complete; BIE will commence by August (if not sooner)
• Stakeholder committee to be defined and convened by end of July
• Initial charter drafted; will be updated as a result of this phase

Other CATracks Enhancements

1. **ADEA-4219**: Last Known Addresses - mailing addresses associated with Deceased entities - are now being geocoded, such that the Reporting & Analytics team may track Campaign giving from deceased donors in major U.S. markets with high alumni concentrations.

2. **Completed Data Loads**
   • **ADEA-4922**: Kellogg MMM program and 1Y students beginning their term in summer 2015 were loaded to CATracks
Our Northwestern Release Highlights

Our Northwestern 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)

7/20/2015
• The new search went live for all alumni on 7/14/15.
• There was an email message in the Alumni News email on 7/15, with a more specific message focused on the directory to follow later in July, the week of July 27.
• ADEA continues to work with ARD and the vendor, Uprising Technology, to resolve issues and complete and prioritize enhancements.

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: Work on this project will re-commence in September with a launch date TBD

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