CATrack Release Highlights – December 2014

1. Data Loads (8 tickets)
Data now updated more frequently than ever before (several times per month, accounting
for 25-30% of monthly team activity). This means more data, and more timely/accurate
data, available in CATracks for reporting purposes and donor engagement.

Recent CLI process improvements: duplicate entities (ADEA 1325) and addresses (ADEA 256) eliminated.
- Prevent duplicate addresses and phone numbers in CATracks
- Prevent duplicate alias names in CATracks
- Prevent duplicate entities in CATracks

2. ADEA-1868
GRS no longer has to manually sort transactions to separate endowed and non-endowed
gifts, saving a substantial amount of time in gift processing. They may now all be entered
in same batch along with online giving.

3. ADEA-738
Two new columns on RPT 172 - Entity Data Export Report (EDE), a sortable spreadsheet
offering a snapshot of data used to analyze loyalty and help fundraisers make informed
decisions.

Two new columns depicting donor loyalty:
- One column for the number of consecutive years of giving for a donor, going back
  from the most recent year of giving
- Another column for the number of years of giving for that donor in total, irrespective of
  the non-consecutive nature of the giving years.

Our Northwestern Release Highlights

1. ADEA-1453
Improved user experience from email link landing page, where visitor is now prompted to
log in rather than seeing an unstyled landing page.

2. ADEA-1747 & ADEA-1755
Improvements to images and visual presentation.

3. ADEA-1779
NetID logins will now be matched to FASIS and SES IDs.

4. ADEA-1829
Online Giving report now includes "Declined Transactions."
5. ADEA-866
Visitors who decide not to use Facebook or LinkedIn to log in can choose a different authentication method instead of seeing an error page.

Completed projects

1. Allocation Stewardship – phase 1, 2 (ASAC Priority) - Project for Donor Relations to store data on stewardees and beneficiaries of funds in CATracks
   - All functionality configured in CATracks
   - Training has been finalized – (posted in phase 2)
   - Phase 2 will include data conversion DRs shadow data base to CT
   - Phase 2 Conversion old CUFs allocations with existing NU Financials accounts
   - Phase 2 Training DR staff

2. Improvements to CATracks Gift Processing and NU Financials Interface
   - GRS Endowed/Non-Endowed Gift Entry (mixed batches) (ADEA 1868)

Active projects

1. Names Issues (ASAC priority)
   - Divided project into 3 components (prefix/suffixes, first names, joint salutations/salutations)
   - Meeting with subgroups- requirements gathering
   - Functional/technical analysis in progress
   - Some documentation in progress
   - Regular updates are provided to SMEs
   - Looking to get sign off on first component

2. School Name Change SCS>SPS
   - Impact analysis is complete
   - Functional specs complete
   - Development on impacted reports and CATracks system in progress
   - Coordinating timeline with BI for testing and a BI job aid in progress
   - Communications planning is in progress

3. Prospect Strategies (ASAC Priority) - Project to address University Overall Strategy for campaign goal tracking (includes navigation, visibility, training and policy rework)
   - Functional analysis is complete for CATracks prospect module
   - Technical and reporting analysis is in progress
   - Meeting with Brock to review training and policy

4. CATracks Load Improvements – enhancement/fixes
   - Ongoing improvements as new loads are added to the process
   - New sources of data require interface logic refactoring
   - Working towards frequent incremental updates