

## **Project Status, Dec 18** <sup>[1]</sup>



December 21, 2015 by [Kim Egan](#) <sup>[2]</sup>

Things continue to progress in the world of eComm and as we near our go-live of February 2, 3 and 4, we are quickly checking things off the list.

The eComm Data Glossary (or formerly, "Dictionary") is complete. This was a monumental effort and took about 12 hours of meetings with Lisa Carr, Nonie Wainwright, Melanie Jones and me to complete. The Glossary is a spreadsheet that outlines every object, field, a field's data values and additional descriptions, as well as it's source system origin. It will serve as a resource for the Managers of Electronic Communication (MECs) as well as users to understand the data available in Salesforce for eComm. In many cases, the meetings to build the Glossary presented opportunities to add "help text," move or relabel fields. Lisa and our enterprise Salesforce Center of Excellence (COE) team is working through these changes, which will provide a more polished and usable solution to our users. The dictionary will eventually be available on our eComm website and we will provide a version of it to users in print format during training in February.

The MECs spent much of November conducting data validation activities and now the COE is working through any identified fixes or changes - most are similar to what I outlined above, as part of the glossary activities. In total, about 50 items have been logged and the COE is actively working through those changes now.

The MECs reviewed a wireframe of the eComm website recently and approved the new design. Melanie is already working on the site and plans to have it ready by February go-live. Some highlights include a link to login to Salesforce using campus credentials, a new user request form, help resources, a blog for our MECs to post eComm best practices and news, and the new video that Travis Chillemi and Michael Edwards are working on.

The new user process has been finalized, but will likely not formally go into practice until Spring 2016 so we can focus on supporting our ~280 users.

The list of users that the COE will provision and we will train in February was delivered to COE yesterday. We will not accept any changes until Jan 8 and at that time, changes will be presented on a weekly basis.

We have also identified an interim user support ticketing solution. We will be using TaskRay within our Salesforce environment to log, manage, escalate and track user support tickets.

TaskRay is actually a project management solution, but we think it will work great to meet our needs come February. The COE can then focus on working with the campuses to identify how to integrate our existing 4 campus help desks, which is not trivial but definitely the best approach for a long term and sustainable solution to support all enterprise Salesforce users, for eComm and beyond.

Lisa and I have completed the final round of email preference additions and changes in Marketing Cloud and Salesforce. Lisa's changes were made in our deveComm sandbox, so they need to be promoted up to the production environment. Once that happens, we can test the integration and formally complete this task.

Lisa has also been finalizing the real-time integration between Salesforce and our source systems so that any bio-demo change that is made in a source system will automatically update Salesforce. Pretty cool!

Phase 2, Cvent development iterations are, for the most part, closed and moving to production. Our final component is to address integration between our two Internet Merchant Accounts (IMA) and PeopleSoft. We continue to have conversations with Treasury, Controllers and Foundation offices to ensure the integration will meet everyone's needs. Kalman Sweetwine in COE? is taking the lead on this front and is doing a phenomenal job of listening to business requirements and finding ways to meet the needs in Cvent and Salesforce.

Melanie and Nonie are working with Kalman on building "real" event registration forms in Cvent. Melanie is working on the eCommference user training registration form, which will go live in early January. And, Nonie is working on several forms for schools on her campuses, one of which is for the School of Medicine.

My focus has turned from email preferences to the final build out of Marketing Cloud, which includes removing test content and users, and adding new users, units and assets. Testing and the sending of "real" emails is slated to begin taking place in early January.

We continue to receive concerned feedback from users about "email lists" that may, or may not, include people who are in one of our source systems. While at a technical level, the functionality absolutely exists in Marketing Cloud - to upload lists and send emails to the people in the lists. The problem is that doing so creates duplicate contacts in Salesforce and affects unsubscribe data/CAN-SPAM - creating long term issues for our database, users and constituents alike. Ultimately, processes and resources must be identified to address all the lists at CU. We are currently aware of more than 1,000 email lists across the CU system. This is such a large and important undertaking that it will be addressed as its own phase/project. The good news is that conversations have already started, people are solutioning and the project will formally kickoff in early 2016. The team is currently trying to identify interim solutions, but are not sure if we will have something in time for February launch.

As we prepare for go-live, we are also turning our attention to the training event, eCommference that will be held at CU South Denver February 2, 3 and 4. Me, Melanie and Nonie did a site visit on Monday and left feeling excited. The venue is going to be perfect and will provide our users an opportunity to step outside of their campus environment and focus on training. As with any event, there are lots of people and logistics to organize. But, it's all doable and we have plenty of time to take care of everything.

I'd like to end with a congratulations to the COE on the hire of two highly skilled developers and architects who come to CU from Rally Software in Boulder. Both have already started working on eComm activities and are helping significantly with finalizing the solution so it is ready by February. Please join me in welcoming to Jeff Benn and Andrew Kohlhepp!

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