Project Status, Dec 4 [1]

December 6, 2015 by Kim Egan [2]

I'll start with an update on the all-user training, which has been secured with CU South Denver for Feb 2, 3 and 4. Each day will be exactly the same so users can select the best day that works with their schedules. We will have a great team to deliver the training, including the MECs, representatives from our eCRM COE and UIS, ACF Solutions, Vertiba and Cvent. We are encouraging our users to do everything they can to attend this training as it will be the best opportunity to learn the tools. The MECs are trying to organize transportation from their campus to CU South Denver each day. Lunch will be included and there is no cost to attend the training. We will send a Save the Date email soon and registration will open the first week of January.

Nonie Wainwright, Melanie Jones and Lisa Carr have spent a considerable amount of time over the last two weeks developing an eComm data dictionary, which will provide details on each eComm object and field in Salesforce. This dictionary will be used extensively for our MECs as they build reports for our 300 users. The sessions also presented opportunities to add help text to the fields and in some cases, move fields so they are grouped together in a more organized manner. Nonie, Melanie and Lisa are slated to be done with the Dictionary on Monday. Specifically, it will provide the following details for each field:

- Source System (eg; Campus Solutions)
- Source System API name (eg; ACAD_PROG)
- Salesforce API name (eg; UIS_Academic_Program__c)
- Salesforce label (eg; Academic Program - this is what the user sees in Salesforce)
- Field Type (eg; Lookup, formula, picklist, etc.)
- Description (eg; School or College)
- Field values (if the field displays codes, for example, we are providing those translations and referncing where in Salesforce or elsewhere to obtain the translations or list)

The MECs spent two hours each morning last week Monday - Thursday with ACF's Anne Early for Marketing Cloud training. It was time well spent.

The MECs have completed their data validation and Cvent testing, which was a monstrous and time-consuming undertaking, but also critical. We plan to review data validation results with Lisa Carr on Thursday. And Cvent testing did not identify any issues that prevent us from moving to the next phase of development.

We sent the final list of eComm users to the COE for provisioning on Monday night. Once users are provisioned, the COE can start applying eComm security packages. We will test and validate the security in a few weeks.

Geopointe has been procured and 10 licences are now available in Salesforce. Eight of those licenses will be assigned to the MEC team to support their reporting needs. This tool will allow us to identify contacts in a region and easily pull them into a report. This is perfect timing because the MECs have three report-building working sessions this coming week with COE, ACF and UIS.

We continue to have conversations with Treasury and Controllers for Internet Merchant Account (IMA) integration with Peoplesoft. After a good meeting on Friday, we have a high degree of confidence that as long as the correct information is provided in an output (csv, for example), information can update Peoplesoft. The focus now is to configure Cvent to deliver the information to our Internet Merchant Account clearing house, Cybersource.

We had a town hall on Thursday afternoon with about 100 attendees. The biggest takeaway was the announcement of the training dates and when Harris will no longer be able to send emails, which is Feb 13. We received a lot of great questions and were able to answer all of them. A recording of the presentation, the power point and all the Q&As will be posted on our website this week.

Our focus over the next few weeks is Marketing Cloud build-out, user provisioning, security testing and validation and preparation for our user training. We also continue to work with the COE on a user support model that utilizes a case management solution.

View the Project Management Update, 12/4 [3]

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