

## **Project Status, July 24** <sup>[1]</sup>



August 24, 2015 by [Kim Egan](#) <sup>[2]</sup>

The eComm team spent this week focused on data loads to the Stage environment (final sandbox before Production). A full load of Advance data through MDM was completed this last week. Yay! We're working through details around loading files for the alumni community and connecting Marketing Cloud. Both of these activities are highly involved and require significant testing. Detailed documentation and team collaboration are taking place to ensure success.

I'm working with ACF on migrating email preference data from Harris Connect to Salesforce. With about 200 categories and nearly 1 million records, this is no small task. We plan to do another load in late October once we go live and transition officially from sending emails from Harris to Salesforce. Related to email preferences, we are fine-tuning the preference center and user experience where constituents will opt out/in to various categories/campaigns.

We've started conversations about launching the alumni community, which is tentatively slated for early October. There continue to be challenges with provisioning alumni for the community. The complexity around merging four campus processes and developing a technology (which requires funding) that supports the effort is causing the delay.

Lisa Carr with UIS and I are working through a data dictionary that will eventually be on the eComm website at [www.cu.edu/ecommm](http://www.cu.edu/ecommm) <sup>[3]</sup> for eComm users to reference when they build out their email queries/reports. Related to this, the eComm website is slated to be updated with Salesforce resources by the end of September.

The eComm team spent a full day on Monday at the CU System office talking through the many action items to prepare for our October launch. It was an extremely productive day. I'm always so impressed with this team (<http://www.cu.edu/ecommm/contact-us/ecommm-specialists> <sup>[4]</sup>) - everyone is extremely engaged and passionate about the program.

We continue to review solutions to support eComm phase 2.0, forms management. Kyle Kirves, our project manager plans to have a project plan to review by Aug 4. Nalini Kaplan and Kalman Sweetwine with the Center of Excellence (CoE) conducted a great working session with the eComm team yesterday to review requirements and begin the development of user stories for each requirement. This effort is laborious, but will support acceptance testing down the road. It's also a great opportunity for the the team to ensure we are thinking

through all the various needs around events, membership, giving and surveys. We've been charged with completing user stories by Aug 12.

Finally, I attended a kickoff meeting for the eCRM CoE Advisory Committee on Tuesday. I'm honored to be a part of the group and excited to see the next step with eCRM governance take shape. Exciting milestones at CU!

## STATUS UPDATE FROM PROJECT MANAGEMENT

### Ecomm – PHASE ONE Current Status: Scope – Green; Timeline – Green

#### Highlights:

- Execution of iterative plan for Stage is underway – next milestone is UIS data load (7/31)
- Marketing Cloud will be connected to Stage in a collaborative effort between CoE and ACF

We are executing against our established snapshot schedule for Stage environment code and data buildout. We are on-schedule, and see no roadblocks to achieving Stage completion by 8/3, test complete by 8/10. We will then create a new snapshot schedule for Prod.

UIS data load for Stage scheduled to complete 7/31. We continue to stay as close to original schedule as possible.

We have revisited the notion of not “bolting on” Marketing Cloud to Stage and have reversed course: we WILL be bolting on Marketing Cloud and testing it in Stage, finalizing steps for how to do that, so that we are in the best position to do similar activities for Prod. This decision does not affect schedule, but allows for much higher degree of confidence that Prod will be in great shape for week of 8/24. CoE will own this activity, but ACF will lend their expertise and co-pilot the process, ideally resulting in documentation of all steps required.

Current schedule for environments, code, data load appears below. Prod snapshot coming some time after 8/10:

ACTIVITY	WHO'S ACCOUNTABLE?	START DATE	END DATE	COMPLETE?
Deploy & Load - Stage	Kim/ACF/Lisa	7/13/2015	7/20/2015	YES
Unit Test - Stage	KIM/ACF	7/20/2015	7/21/2015	YES
Sign off on Unit Test Results - Stage	Kim	7/21/2015	7/22/2015	Yes
CoE Regression Testing - Stage	Rebecca/Lynn	7/22/2015	7/24/2015	Yes

ACTIVITY	WHO'S ACCOUNTABLE?	START DATE	END DATE	COMPLETE?
Data Load	Lisa/UIS	7/22/2015	7/31/2015	No
CoE Regression Testing #2-Stagve	Rebecca/Lynn	8/3/2015	8/5/2015	No
Functional Testing-Stage	eComm	8/3/2015	8/5/2015	No

No change to future Plans:

- Production complete in August (all software and data reconciled in Prod)
- Allow MEC usage and bug reporting in August
- SuperUsers (UAT) deploy sometime in September
- Provision Community users in September
- Conduct training to September/October
- Rollout to all Production users in October

We are currently awaiting approval of “black box” provisioning to move forward with provisioning planning.

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