

## **Project Status, Oct 9** <sup>[1]</sup>



October 20, 2015 by [Kim Egan](#) <sup>[2]</sup>

Here's a few comments about last week's eComm activities.

### **Provisioning & Authentication**

Working sessions have started to identify a solution for provisioning and authentication, which will accomplish two things: telling Salesforce who can login and allowing users to login. These conversations are highly technical and admittedly, difficult for me to keep up with. I feel confident that the right people are working hard and have eComm's best interests in mind.

In parallel, it is my understanding that eCRM and Identity Management (IDM) leadership are in discussions around funding for the enterprise path. As a reminder, there are two options to meet eComm requirements. The first option uses Salesforce and the second option utilizes our IDM systems. The latter option is considered enterprise, is outside of Salesforce functionality and would meet additional requirements beyond eComm. Conversations around funding are for the enterprise solution. I hope to know more soon.

### **New user onboarding**

As we think about the technical side of adding new users to Salesforce, there's also work to be done around pre-Salesforce access. One important activity includes ensuring users have the appropriate training and are not only able to do their jobs in Salesforce, but also have competency around how to view and handle university data. Erin Frazier at CU-Boulder University Communications has taken the task creating (or aligning existing) Skilsoft courses for eComm that include:

- FERPA
- Data security
- Accessibility in email
- Salesforce and Marketing Cloud demonstrated competency

The completion of these courses will be required for CU employees to be granted access to eComm Salesforce. Many thanks to Erin for taking this on.

### **Affiliation with Scope (AWS)**

It was a busy week in the land of AWS, which is the field in Salesforce that identifies a record's affiliation with CU (eg; alumni, faculty, staff, etc.) as well as their campus connection (eg; CU-Boulder, CU Denver, etc.). This field will be the foundation of every report/email list in

Salesforce. It's important.

The MECs continue to wrap their heads around the data that is sent to the field, while also understanding how to use the information for reporting purposes as the two go hand-in-hand. We are working with the COE, UIS and ACF to connect the dots. Meetings are scheduled this week to continue this effort.

In the last month, we identified a few gaps for alumni populations that would be delivered from the campus IDM systems to the AWS in Salesforce. Specifically, CU-Boulder will not have 1988-2005 alumni (~110,000) provisioned within their IDM system and UCCS will also not have 1988-2012 alumni (~29,000) in their IDM system until January. As a work-around, we loaded all alumni data from Advance to the AWS field, which will allow us to build reports using the AWS field and will require little-to-no modification when the IDM data is loaded come January. A huge thanks to Lisa Carr, Jason Armbruster and Dennis Lintvedt for their quick thinking and turn-around to get this data loaded in time for data validation.

## Phase 2

We spent Friday afternoon with the COE and Vertiba (our Phase 2 implementation partner) walking through the various processes for form creation, submission and post-activities under eComm phase 2. It was a great session and is getting us all excited about forms (events, membership and surveys). The work that the COE and Vertiba have to do is extensive and the timeline is aggressive, so everyone will be laser-focused on meeting deadlines. With Kyle as our fierce project manager, I have no worries.

## Security

Finally, security has been a topic for quite a while. I feel like we are on the home stretch! We have a "summit" of sorts scheduled on Thursday with the MECs, COE, and ACF to fine tune eComm security. The goal is to be "done" with eComm security by the conclusion of that meeting. There shall be cake afterwards.

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