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eComm Specialist Digest | October 19, 2023 [1]

October 20, 2023 by Melanie Jones [2]

True or False The system eComm team has addressed 300 requests via our Help Ticket so far this calendar year. Scroll down for the answer.

General Updates

- **Oct. eComm Specialist Meeting:** Big thanks to Kayla Boyer and Eric Nissen for kicking off eComm specialist presentations at our monthly meeting to review how they approach support for UCCS users and the broader campus.
    - Presentation [3]
    - Recording [4]| 26 min.
- **Upcoming Nov. eComm Specialist Meeting:** We are seeking a group to present at our Nov. 2 session from 2 - 3 p.m. If you would like topic suggestions (successes or struggles) or assistance with presenting, don't hesitate to reach out.
- **Pre-Access Requirement Update:** Effective Oct. 2, all faculty, staff, and student employees must complete the Information Security Awareness Skillsoft training course every two years instead of every three. This course is an eComm pre-access requirement. The eComm team is updating relevant resources along the license object in Salesforce.
    - Please be mindful of this new requirement when communicating and collecting completed SkillSoft course screenshots for new provisioning requests.
    - The system team is conducting the annual Pre-Access Requirement Audit. Given the above change, we anticipate a significant number of users will need to take action. We will manage this audit and keep eComm specialists updated via Chatter. We may require assistance from eComm specialists if their users do not take action before the deadline (or they will be deprovisioned).

Roadmap Updates

DATA

- **Person of Interest (POI) Integration |** POI data [5] is available in Salesforce to Admins only. Prior to new data being available in production to all users, we will provide clarity on the impacts to existing reports, how to modify reports based on your needs, and more. POI data will become available once prioritized by the eComm specialists, which entails reviewing/updating 1,400+ reports.
- **Dual Employees |** Due to some housekeeping changes in Human Capital Management (HCM), the former "campus 6" indicator is no longer available, meaning we can no longer query for "dual campus" employees in our Salesforce reports as done previously.
    - The solution is to use a series of job department IDs (109 in total) as filters in the report

[6] to approximate what was previously represented by "campus 6". Unfortunately, this will encompass a broader range than the previous "campus 6" solution — about 2,500 central admin employees at CU Anschutz and CU Denver — compared to approximately 1,000 individuals previously.

- **CU Ascend Integrations with Salesforce |** The following items are due to changes within CU Ascend (formerly Advance). Until resolved, eComm specialists will need to get this data from CU Ascend or their user and import it to Salesforce via a Campaign [7] and/or import a CSV file to a Data Extension [8].
    - **Interest Data |** CU Ascend is no longer populating the Interests object in eComm's Salesforce environment. Both teams are working together to understand the full scope of missing Interest data and identify a timeline to repopulate the data.
    - **Missing Advance ID and Primary Email |** A group of employees are missing Advance ID and thus missing primary email addresses in Salesforce. The Faculty/Staff load from the HR System to Ascend has been delayed along with other loads such as graduate, new student, parent, and patient data loads. The most recent faculty/staff load took place in early May before the transition to Ascend. Advancement hasn't been given an ETA for the HR integration to resume, although they are actively working on a solution to these integration issues.

MAINTENANCE

- **Reminder |** When creating a new Data Extension in a Business Unit that is shared among multiple groups, use the correct naming convention (group abbreviation) and put the Data Extension in the correct folder in the Business Unit [9].
- **Q4 Email Preference Complete |** Q4 preferences changes [10] (UCCS and CU Anschutz) concluded last week.
- **Designation Codes for Fundraising Cvent Events |** Designation Code replaced the Allocation Code for fundraising events with the launch of CU Ascend. You will still see the Allocation Code field in Cvent, however, this is only for fundraising events that launched prior to the launch of CU Ascend and will be phased out.

Ongoing Opportunities

- Request the following items by submitting a help ticket [11] and selecting "Marketing Cloud >> select topic below >> follow instructions".
    - Einstein [12]
    - Journey Builder [13]
        - With every commencement, CU Denver invites the graduating class to contribute to a fund of their choosing. A journey promoting this opportunity to Spring 2023 graduates is launching at the end of March.
          A Birthday Journey Email for CU Anschutz is underway, pending content (similar to the one launched by UCCS for alumni).
    - Dynamic Content [14]

New/Updated Resources

- Changes to Business Units [15] (new)
- Changes to Email Preferences [10] (update)
- Using Custom Email Templates [16] (new)
- Creating Dashboards [17] (update)

Ongoing Data Monitoring

- Data Issues Dashboard [18]

Answer: False It's actually over 450! Having a single ticketing solution for all requests to the System eComm team has been crucial to scaling our support model. Thanks to all for adopting this model!

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[18]
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