

# Constituent Relationship Management (CRM) Program Status

Weekly Update – 08/20 - 08/26

---

## Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Yellow

### Highlights:

- Stage environment data validation and reconciliation is delayed, but proceeding
- CoE has received and tested the code package; environments syncing is next
- Revised project schedule complete – looking to synch with Phase 2 schedule
- Authentication plan is in place – following up periodically with the various campus teams
- Provisioning for FULL USERS on-schedule and to be handled by CoE
- Provisioning of Community Users (i.e., Alumni) will have refined plan by Friday, September 4<sup>th</sup>

Team continues to work through data validations in Stage 1 (pre-refresh Stage environment). Data reconciliation must be complete before triggering Stage refresh.

CoE is in receipt of package.xml files from ACF. Code was installed on August 26<sup>th</sup> and validated by combined team of CoE and contractors/consultants. Production train (i.e., the dev environments, Test, and Stage) need to be synched before beginning refresh activities. This will require a significant amount of testing, but critical to making sure nothing is pushed forward that could break Production for users working in the Prod system.

Project schedule has been revised to incorporate Stage refresh activities. High-level milestones appear below:

Stage Refresh, Done (& Tested)	10/12/15
Prod Done (& Tested)	11/11/15
MEC Rollout	11/12/15
Super User Rollout (?)	12/12/15
Training *	01/04/16
Full User Set Complete *	01/11/16

Note: the detailed project schedule is being revisited to see if Phase 2 activities and rollouts can synch with Phase 1, so that we're rolling both phases out at the same time, having one training series instead of two, etc. Long gaps in the schedule between milestones represent a.) a desired one month MECs-only in production timeframe and b.) accounting for holiday breaks.

Team adopted plan for authentication this week. Followup next week, as well as periodic check-ins, will be scheduled by the PM.

As noted last week, provisioning for FULL USERS is on track, handled by CoE, and up to 200 eComm Users, plus additional eComm users as licenses are purchased, can be configured manually on current timeline. No roadblocks or issues.

Provisioning for community users (i.e., Alumni) discussions are underway. Team is exploring the notions of a.) Enterprise Identity Management, b.) the "black box" or Salesforce specific solution, c.) a Plan C where Boulder OIT delivers first wave of community users for all campuses. Or a combination/fusion of some or all three. Detailed design session happens this coming week (September 3rd) with firm recommendations expected as an outcome.

## Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

### Highlights:

- Vendor identification and selection process complete – CVENT and Cvent Express
- OIT PMO documentation delivered in draft form – PM Plan, RACI matrix, schedule
- CoE completed initial audit of user stories - MEC/Special Forces Team completing first revisions this week

The eComm leadership team has selected CVENT as the events vendor for eComm Phase Two. Client has assumed a certain amount of risk in choosing CVENT prior to full user stories analysis.

Project plan, RACI matrix, project schedule, and kickoff documentation are complete. Kickoff meeting with eComm team occurs August 31<sup>st</sup> in Denver.

CoE analyst Kalman Sweetwine completed initial feasibility review of user stories in draft form. There were no huge impediments to moving forward, and nothing identified that cannot be accounted for with either OOTB Cvent or configuration/design. MECS are revised 10-12 user stories for clarity. ETA is 8/28.