

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 COMPLETE and approved
- CoE works with ACF to refine package.xml files and processes
- Revised project schedule will synch Phase 1 and Phase 2 to deliver to MECs mid-November; larger group in January 2016
- 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 4th

Data validation is COMPLETE. This closes a task that was fundamental to getting ready for Stage environment refresh. UIS is on-target to do second data push beginning September 11, provided all other Stage gateway items owned by either CoE or ACF close.

CoE continues to work closely with ACF to refine code packages and processes. Revised code was installed September 4 and validated by combined team of CoE and contractors/consultants. Production train (i.e., the dev environments, Test, and Stage) should be synched before beginning refresh activities, but will likely be pushed back and cleaned up after eComm P1 goes to production. This is a risk that the CoE is accepting and it will require strict monitoring and may generate errors that will need to be reconciled.

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 – P1	11/12/15
MEC Rollout – P2	11/17/15
Super User Rollout – P1 & P2	12/12/15
Training *	01/04/16
Full User Set Complete *	01/11/16

Project schedule continues to keep P1 and P2 separate so that resources can be managed effectively. Timelines do reflect P1 and P2 work going on in tandem, though.

As noted last week, 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 occurred this week. CoE has action items to clear, but authentication plan is in place.

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. Workshop with representatives from all four campuses held September 3rd, with action items and next steps outlined. Subject will continue to be fleshed out weekly at technical team meetings.

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.

Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

Highlights:

- CoE completed initial audit of user stories - MEC/Special Forces Team completing first revisions this week

CoE analyst Kalman Sweetwine completed initial feasibility review of user stories in draft form. Kalman continues to work these user stories until such time as they are refined with acceptance criteria. Consultant/vendor engagement for P2 is still under consideration.

There are no current roadblocks or major issues to moving forward. However, management of resources and competing priorities against P1 work will have to be managed closely (see above).