

# Constituent Relationship Management (CRM) Program Status

Weekly Update – 09/21 - 09/25

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## Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Yellow

### Highlights:

- Affiliation with Scope remains in discussion – testing to see if delivery matches expectations
- Test planning underway this week for Stage environment in advance of moving to Prod (no refresh)
- Authentication for all four campuses, for all short-term community users occurs 10/1
- Provisioning for FULL USERS on-schedule and to be handled by CoE – no change
- Provisioning of Community Users (i.e., Alumni) proposals are in place – no change
- Security – customer requesting assistance with practical application of security to individual users as well as full explanation of security philosophy

Affiliations with Scope – and how the MECs use that field for reporting – remains in discussion. Perspective exists that the data as it exists in the field(s) can be used to pull appropriate reports. CoE (Kalman) will be exploring reporting with a few targeted MECS to determine use cases and any gaps against the data. As well as other alternatives.

Test planning for P1 (additional, thorough functional and regression testing) against Stage is underway. Goal will be to begin executing tests next week, and complete by 10/12. Production build to begin soon after that. We will plan for deployments in advance of that date for data load, etc., to make sure resources are available.

Authentication planning and design for all four campuses, all short-term community needs and/or production users will occur 10/1. This lengthy discussion will determine front doors for users, how we channel them to/from Salesforce (IDP, etc.) and put them into the proper community/user set based on their permissions and intent. LOE to execute on the plan should be relatively small compared to other efforts, but will need to be adequately designed.

### Test planning

No change to Provisioning plan. Provisioning of FULL USERS to be completed manually by CoE. No barriers or risks to completing this activity on timelines. Provisioning of COMMUNITY USERS is still being diagnosed. We have the Enterprise solution proposal for brokering provisioning and claiming of accounts as well as the “black box” brokering system. Which choice remains the best remains within the purview of the technical team based on timeframe?

High-level milestones (note shift in training date):

STAGE TESTS COMPLETE	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 *	01/11/16
Full User Set Complete *	01/18/16

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.

## Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

### Highlights:

- Team kicks off eComm P2 as a technical team 9/28
- Team kicks off eComm P2 with client/customer on 10/1

Adding two scheduled kickoffs for eComm P2: one for the technical team, one for the client/customer (due to scheduling constraints). Schedule is aggressive for P2, but concentration on core functionality and minimal set requirements for launch in November, with potential post-prod iterations to rollout additional requirements.

Reorientation of Phase 1 to Stage-to-Prod has necessitated moving resources to creating test plans for P1. We do have an additional staff augment to assist with this work. CoE continues to work user stories and refine with acceptance criteria.

Management of resources and competing priorities against P1 work remain the largest risk.