

Constituent Relationship Management (CRM) Program Status

Weekly Update – 09/26 - 10/02

Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Yellow

Highlights:

- Affiliation with Scope remains in discussion – continued conversations on how to make it work for reporting
- Test planning completed this week for Stage environment in advance of moving to Prod (no refresh)
- Authentication planning for all four campuses, for all short-term community users began 10/1
- Security – customer requesting assistance with practical application of security to individual users as well as full explanation of security philosophy
- 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

Affiliations with Scope (AWS) – and how the MECs use that field for reporting – remains in discussion. Initial thoughts around using “Affiliations” within SFDC proved to be flawed. Team will return to AWS to revisit original design and intent. Goal will be to gain a finer intelligence on what/how MECs want to report and see if a solution exists.

Test planning for P1 (additional, thorough functional and regression testing) against Stage is complete. Goal will be to begin executing tests next week, and complete by 10/12. Pre-production environment planning is underway. 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 began 10/1. Current plan is to work with SFDC to determine answers to questions on IDP. Additionally, architecture team requests use cases for authentication to aid in solution development. We still need to 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.

Security planning should complete next week. Security document for profiles, permission sets, public groups, and other security protocols is complete. Nalini Kaplan reconciled the security document and we now need to map individual users to the matrix – 10/08.

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 below. No change in dates from last week:

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

Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

Highlights:

- Team completed business process review (BPR) this week
- Team is licensed and ready to configure in selected solution (CVENT)
- User stories and business processes are groomed and team is ready to begin configuration and coding
- Full CRM project documentation will load into ProjectForce next week

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.

Team completed business process review (BPR) and user story grooming last week with the MECs. While additional questions will undoubtedly come up as part and parcel of project delivery and development, team believes that they are ready to go with customization beginning as early as Monday of next week. Full support and documentation of the project will be loaded into ProjectForce next week.

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