

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 as an issue is closed
- Test execution is scheduled to complete by Friday COB
- Security model was approved and adopted by the team on Thursday, 10/08/15 – initiating freeze to security model
- Freeze adopted for DevEcomm environment in advance of Prod environment build – 10/12
- Authentication planning for all four campuses, for all short-term community users continues – straw models created for review by team
- 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 – as a pre-Prod rollout issue is closed. Reporting, generally, and Affiliations, specifically, is in place where training, documentation, and support will allow us to move forward with the schedule right now. Notion of importing Boulder alumni IDM data is tabled for the time being as it presents significant risk to the schedule.

Test execution is underway and scheduled to complete (with a few exceptions and refinements) by 10/09. Outstanding tests are considered precautionary, but do not present a significant risk to moving forward with Prod environment build. Data load into Prod scheduled to begin 10/16.

Security model was reviewed with CoE, ACF, and MECS (eComm) and approved on 10/08. This was the last step to freezing DevEcomm for Prod build out. While some refinements will be expected after 11/11, no further changes to the DevEcomm environment – either for code for security – are expected. Any additional changes may be accommodated after 11/11. Any late prioritization will necessitate a change to schedule.

Chris Edmundson has modeled authentication pages for review and approval. Team will still need to refine for that for all four campuses. This is not a risk or “showstopper” for 11/11 rollout to MECS, but should be in place for that rollout.

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:

- 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

As noted last 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 capitalized on business process review last week to leverage knowledge and combine/groom user stories. We are a “go” to load reqs into ProjectForce next week, plan iterations, and begin development.

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