

# Constituent Relationship Management (CRM) Program Status

Weekly Update – 10/12 - 10/16

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## Ecomm – PHASE ONE

Current Status: Scope – **Green**; Timeline – Green

### Highlights:

- **PRODUCTION WINDOW IS OPEN!**
- Test execution is scheduled to complete by Friday COB
- Web page finalization for email opt-ins/opt-outs occurs over next three weeks (beginning 10/19)
- 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

The project has entered the Production environment code and data population window. Beginning 10/12, team working to migrate code packages from devecomm and promote to production. Data load originally scheduled to begin 10/16 is delayed, but does not present a significant issue with the schedule. Team works through deployment checklist in the coming weeks. Finesse and finalization of code and ironing out of issues occurs week of 10/26 with assistance of ACF contractors. No impediments or roadblocks to that portion of the schedule, so returning project schedule status to **green**.

Test execution by the CoE team, in advance of production rollout, is complete. eComm MEC team will complete additional functional testing in Stage, but this is not a roadblock to schedule.

As reported last week, security model was reviewed with CoE, ACF, and MECS (eComm) and approved on 10/08. Additional clarifications were provided this week, but no changes to the model are expected. While some refinements will be expected after 11/11, no further changes to the DevEcomm environment – either for code for security – are expected.

This week, eComm leadership approved an additional Statement of Work for contracted assistance with Web page creation for email opt-in/opt-out work. Contractor to build the pages in Stage and test against Marketing Connector. When complete, Marketing Connector will be removed from Stage and moved to Prod. While this work was not on the project's radar, it does not present a significant delay to schedule. If tests are not completed by the time we need to move Marketing Connector from Stage to Prod, client accepts the risk of completing remaining testing in Prod during MEC soft launch window (11/11).

Team continues to work through authentication notions. Chris Edmundson is working up a plan for all four campuses leveraging native pages within Salesforce. Team is optimistic that this will be in place for 11/11. This is not a risk or "showstopper" for 11/11 rollout to MECS if not available, 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.

No change to provisioning of COMMUNITY USERS. 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 - COMPLETE
Data Load Starts	10/19/15 – ON TARGET
Issues Logging & Reconciliation – Code & Data	10/26/15 – SCHEDULED
Prod Done (& Tested)	11/11/15 – ON TARGET
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

This week we completed the requirements review and received confirmation of the requirements for this release.

With a strong focus on going live by the beginning of December we have organized the requirements into iterations and will be tracking our work and deliverables to those dates. Next steps include configuration team testing of requirements and scheduling the User Acceptance Testing when we hand off this iteration.