

## **Project Status, Nov 20** <sup>[1]</sup>



November 22, 2015 by [Kim Egan](#) <sup>[2]</sup>

We are in production but we're not quite ready for users. Testing and fine-tuning the solution is our focus through December.

This week, the team conducted data validation, which was a massive undertaking that required at least a full day of their time. Each eComm member (MEC)? was assigned about 60 records to validate against hundreds of fields in Salesforce. The activity required the look-up of individual records in Salesforce and cross reference of those records in a source system or a spreadsheet to ensure what they see in Salesforce matches what they see elsewhere. If it matches, the record passes validation. Failed validations may reveal bugs, permission issues or errors in the data load. From there, our friends in UIS and COE will investigate, resolve and re-validate.

Testing provides benefits beyond validation. It also helps ensure the data is presented in a usable way for our users, which may mean renaming field labels, adding help text or moving the location of a field so it is more logically grouped with other similar fields. And finally, the repetitive action of looking records up provides additional training to our MECs who will soon be tier 1 support.

After data validation, we will then move into testing other components of the eComm solution. Here's the schedule:

- Cvent: 11/23 - 11/30
- Reports: 11/30 - 12/4
- Marketing Cloud: 12/7 - 12/11
- Salesforce eComm Security: 12/14 - 12/18
- Geolocation: 12/28 - 12/30

In addition to testing, development is taking place. Over the next several weeks, I will be focused on adding new users to Marketing Cloud, assigning them to their associated units, loading email templates and adding new email preferences and profile centers. This work will wrap up before December 7.

ACF Solutions will be training the MECs the week of Nov 30, specifically on Marketing Cloud. We will have two-hour virtual sessions Mon-Thursday with ACF's Anne Early. Cvent training for the MECs will be scheduled soon and facilitated by COE and Vertiba.

We have completed our business requirement analysis with Treasury, Controller and the Foundation for event registration forms that take credit card transactions. Our next step is to integrate our Internet Merchant Accounts with PeopleSoft so speedtypes are updated with transaction activity. Manual reconciliation may be required until integration takes place.

We have approximately 280 users who will be trained in January. These users will require an increased level of support immediately after training and longterm. We have the people in place to support them (thank you, MECs!), but are working to identify a case management solution that is cross-campus and allows our MECs to track, escalate and report on user help tickets. We are also fine-tuning the new user process - for those beyond our 280 users. I think we are close and are committed to having both processes in place before launch.

User training is tentatively scheduled at The Wildlife Experience / CU South Denver January 12, 13 and 14. We are waiting until after Thanksgiving to see if classrooms will be available later in January, specifically January 26, 27 and 28. All three days will be exactly the same so users can pick a day that works best with their schedules. We will have a fantastic team on hand each day that includes all the MECs, Lisa Carr (UIS), Kyle Kirves (COE), Kalman Sweetwine (COE), ACF Solutions (Virginia, Alanna and Anne), Vertiba and Cvent. We're all getting really excited.

I want to end with an update on the eComm video. Travis, Mike and Normandy shared a story board with Ken McConnellogue and the MECs on Thursday. Everyone likes the direction and gave them the green light to keep moving. The video will kickoff each training day, but will also be used on our website and elsewhere longterm to articulate, at a high level, what eComm is and it's benefits. This video is turning out to be the icing on the cake in many ways. Huge thanks to Travis, Mike and Normandy for their great work.

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