

# Constituent Relationship Management (CRM) Program Status

Weekly Update – 10/19 - 10/23

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## Ecomm – PHASE ONE

Current Status: Scope – Green; Timeline – Green

### Highlights:

- **PRODUCTION WINDOW IS OPEN!**
- Code/configuration for P1 (non-community) is in Prod
- eComm working with ACF/Nimblejack to complete opt-in/opt-out pages – deadline 11/4
- MECS testing in Stage environment – end date 11/4
- Data loads progressing this week – deadline 11/6 (but aiming for earlier)
- CoE implementing security model in production train – no issues or roadblocks
- Authentication planning for all four campuses, for all short-term community users continues – straw models created for review by team – deadline 12/1
- 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
- Team is exploring moving Community into the production train early

As stated last week, the project has entered the Production environment code and data population window. Significant progress against deployment checklist, though some areas of ambiguity (how long tasks take to complete) remain. Finesse and finalization of code and ironing out of issues occurs week of 11/09 with assistance of ACF contractors. No impediments or roadblocks to that portion of the schedule, so returning project schedule status to green.

Contractor (Nimblejack) is on target to deliver Web pages for email opt-in/opt-out and have them work with Marketing Connector (due 11/4). When complete, Marketing Connector will be removed from Stage and moved to Prod. Tests will complete in Stage by 11/4.

eComm MEC team conducting tests in Stage environment, due 11/4. MECS have a test plan to follow, but are welcome to pursue whatever testing is most significant for their role/campus provided that documented results are submitted to the Project Manager.

Data loads are going well. Contacts should finish by end of weekend (10/25). Batch loading immediately follows. There is some mismatch in data for contacts that Erin Frazier and Lisa Carr are investigating, but likely due to group accounts. No impediments or roadblocks to 11/11 date.

CoE is refining security settings in the production train and will have them in place by or before MEC Prod testing window (11/11).

Team continues to work through authentication notions all four campuses will leverage 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.

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Team is considering moving Community configuration/code into the Production train early, and move to Test environment possibly as early as next week.

High-level milestones below. No change in dates from last week:

STAGE TESTS COMPLETE - CoE	10/12/15 - COMPLETE
Data Load Starts	10/19/15 – ON TARGET
Data Load Complete	11/06/15 – ON TARGET
Issues Logging & Reconciliation – Code & Data	11/09/15 – SCHEDULED
Prod Done (& Tested)	11/11/15 – ON TARGET
MEC Rollout – P1	11/11/15 – ON TARGET
MEC Rollout – P2	11/17/15
Super User Rollout – P1 & P2	12/12/15
Training *	01/18/16
Full User Set Complete *	01/25/16

## Ecomm – PHASE TWO

Current Status: Scope – Green; Timeline – Green

This week we made significant headway on this iteration and are ready for the hand off to the UAT team next week. Team has written detailed acceptance criteria to assist the users as they are testing the solution.

With the UAT team starting testing early next week, we will work to get a head start on the next iteration before bugs start to come in and our attention is pulled to bug fixing and the subsequent conversations around those issues.

**Iteration completion readout:** of 100 LOE hours, team has 28 remaining and is on track to complete early next week, ahead of schedule.