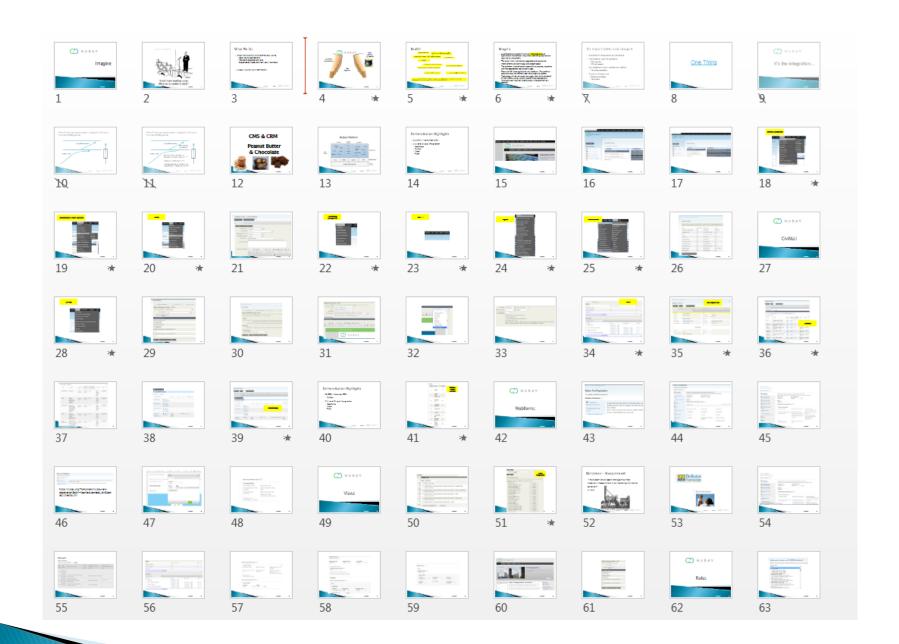


Drupal & CiviCRM



"I don't have anything to say. Allow me to explain in detail."





David Tarrant

1st

Executive Director at NuBay Services Corp.

Greater Boston Area | Information Technology and Services

Current Nubay Services, Eagle Rock Partners

Previous Auction Holdings, Inc., SmartSource Corporation, Net

Ventures

Education Harvard University

Send a message

500+ connections

https://www.linkedin.com/pub/david-tarrant/0/28/543



Contact Info



Home

Non-Profits

Volunteers

Contact Us

Login



Technology Expertise

Know-how to identify, implement and support the best in open source and cloud computing solutions

1 2



Contact Nubay

First Name *

Last Name *

Nubay - Technology assistance for non-profits

Nubay Services is a Massachusetts based 501(c)3 non-profit public charity with a mission to provide technology services to non-profits using open source applications hosted on cloud servers.

Our applications are supported by a network of technology industry volunteers who use their skills to help non-profits utilize technology to better achieve their missions. The use of open source applications, low cost cloud servers, and volunteers allow Nubay to provide enterprise class applications to non-

Find us on







Recent blog posts

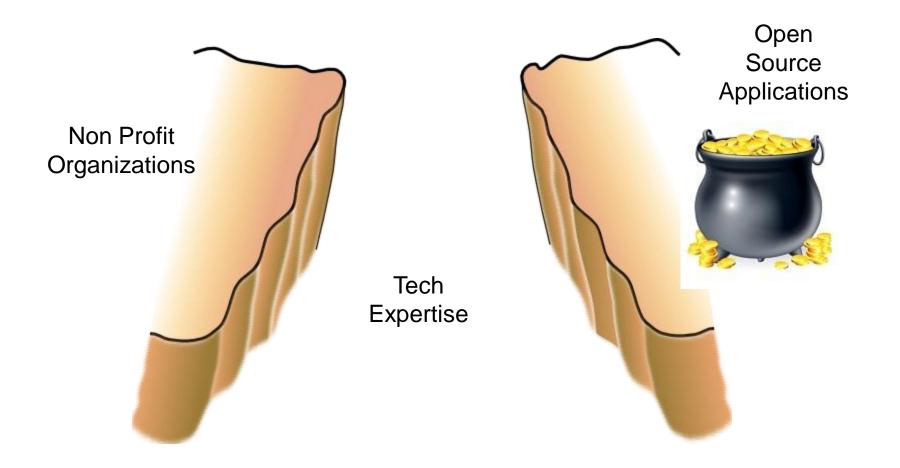
· Vision Grant from The Boston Foundation

Nubay: What We Do

- Help non-profits with technology using
 - Open source applications,
 - Hosted on cloud servers, and
 - Supported by Nubay and tech-savvy volunteers

Nubay is a 501(c)3 non-profit





Looking into the chasm . . .

yum install httpd

RewriteCond %{SERVER_PORT} 80

openssl req -sha256 -new -newkey rsa:2048

vi httpd.conf

sudo su

tar -xzvf drupal-7.22.tar.gz

sudo chkconfig httpd on

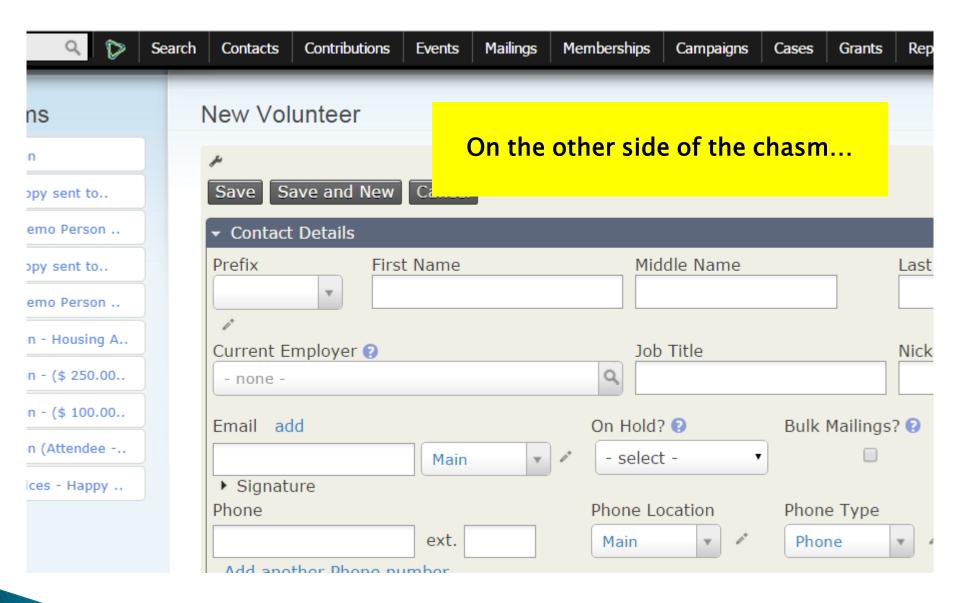
chmod 640 sites/default/settings.php

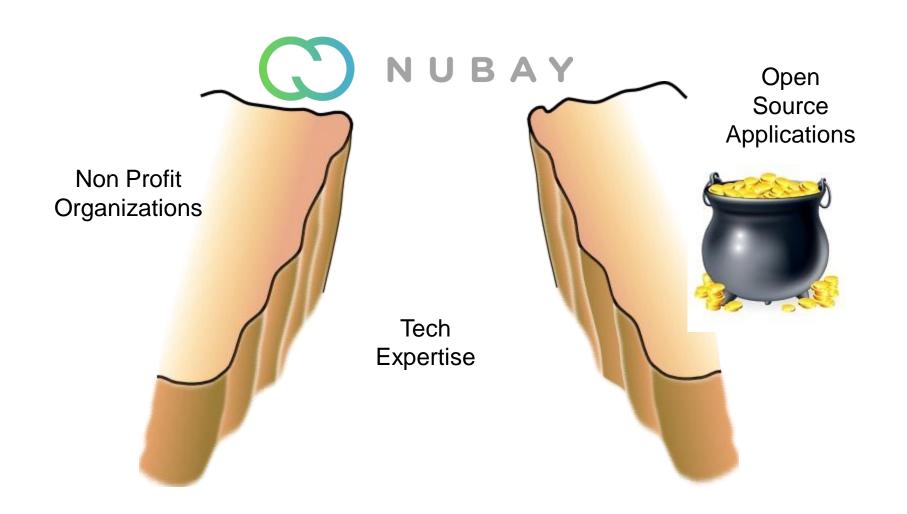
Options FollowSymLinks

SSLProtocol All -SSLv2 -SSLv3

*/5 * * * * wget -O - -q -t 1 'http://domain/sites/all/modules/civicrm/bin/cron.php? name=mailsender&pass=mailsenderpassword&key=sitekey';





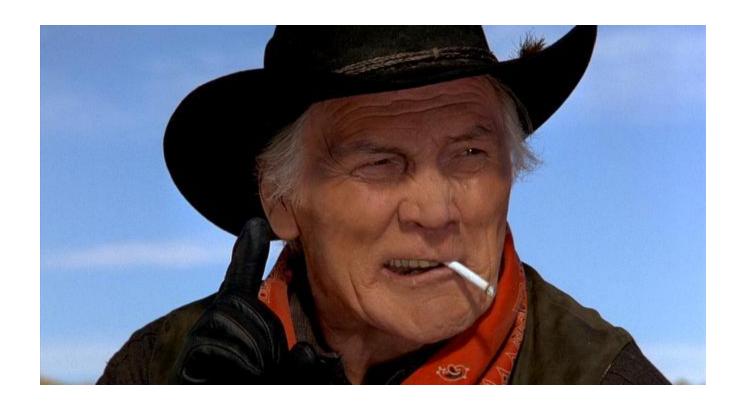


Imagine

- A comprehensive platform with an integrated suite of applications that address the primary operating applications required by non-profits.
- The suite is fully maintained, upgraded and supported.
- Improvements are continuous and broad-based.
- The platform is cloud-hosted accessible by anyone, anywhere with the appropriate security privileges.
- There are NO licensing fees for this platform. The platform costs less than the monthly cost for a single cell phone.
- Technology skilled volunteers can apply their skills on behalf of non-profits using a known platform and applications. Volunteers can help non-profits at any time and from any location.







One Thing

CMS & CRM

Peanut Butter & Chocolate





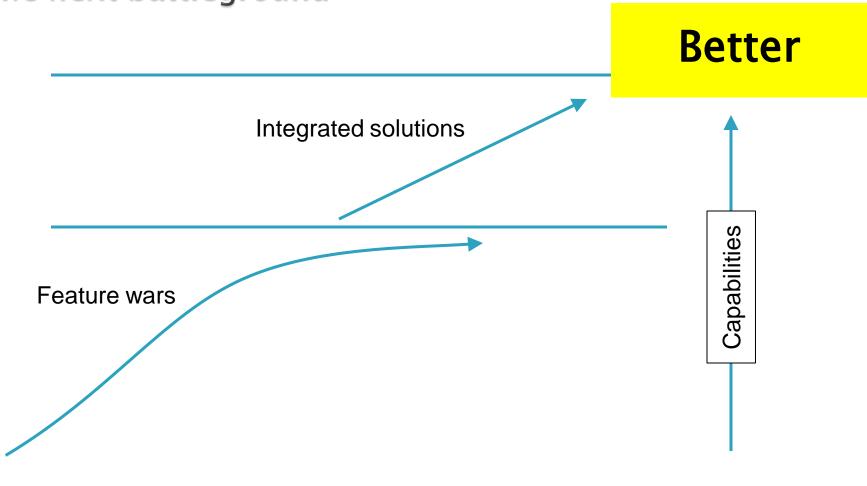


A Paradox? Open Source – Cheaper <u>and</u> Better

- Benefits of integration are dramatic
- Development cost community effort
- Support cheaper too
 - Shared knowledge
 - Volunteers



When features are exhausted, integration becomes the next battleground





When features are exhausted, integration becomes the next battleground

Integrated solutions

Open source applications?

Feature wars

Donor Perfect vs. CiviCRM vs. Giftworks vs. Raiser's Edge vs. ???

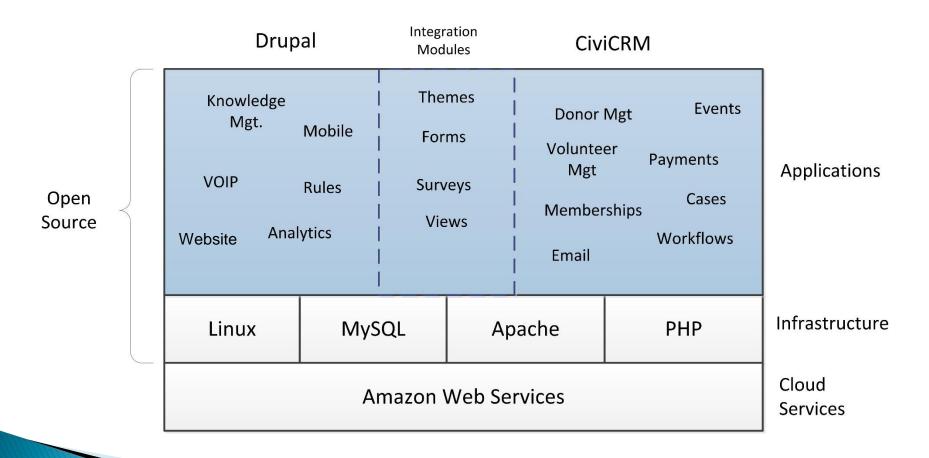
Drupal vs. WordPress vs. ???

Constant Contact vs. MailChimp vs. Exact Target vs. Responsys vs. ???

Capabilities

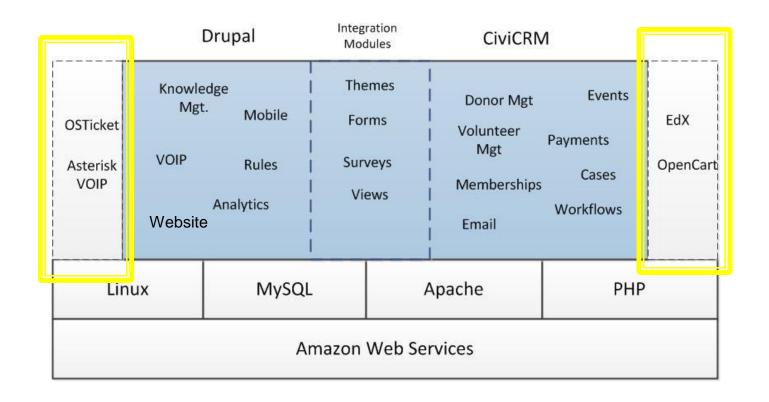


Nubay Platform





Nubay Platform

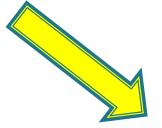




Demonstration Outline

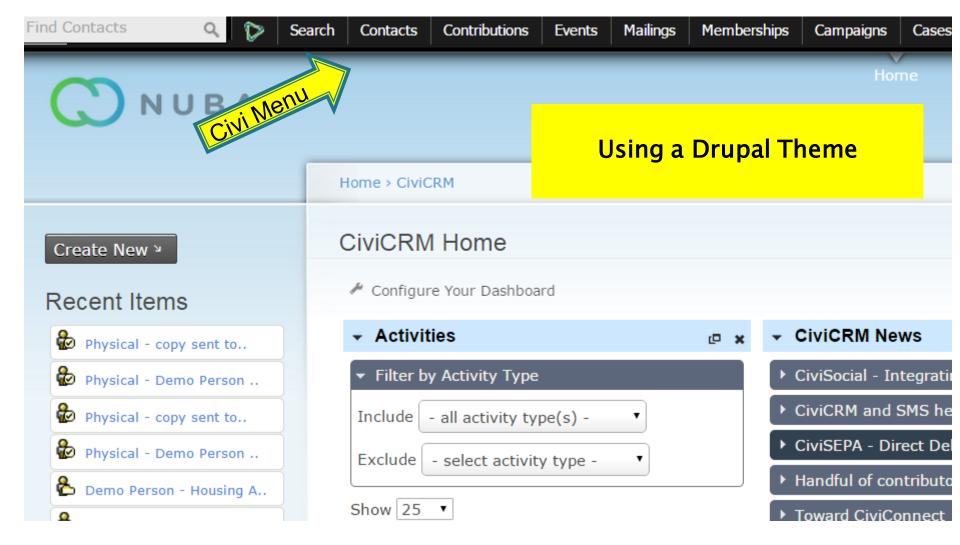
- CiviCRM More than CRM
- Civi and Drupal Integration
 - CiviMail
 - Webforms
 - Views
 - Rules
- Integration example
 - Outcomes



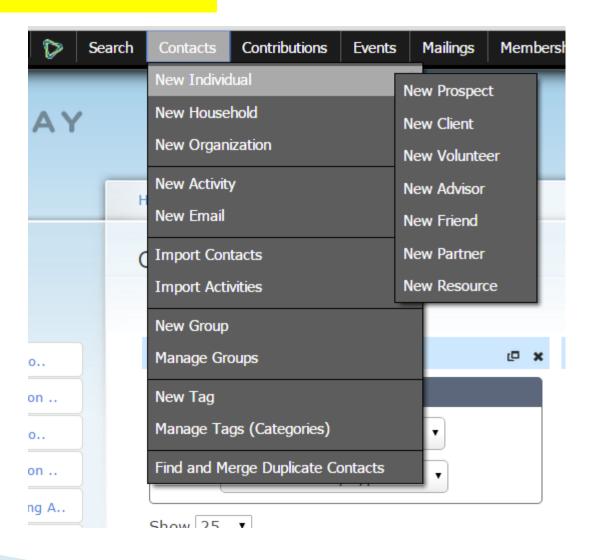


Civi "lives" within Drupal

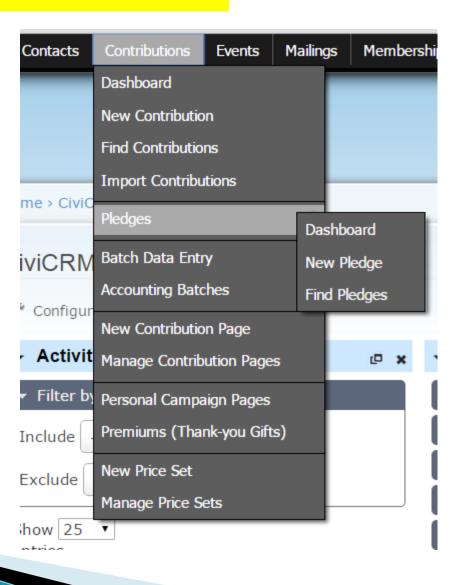




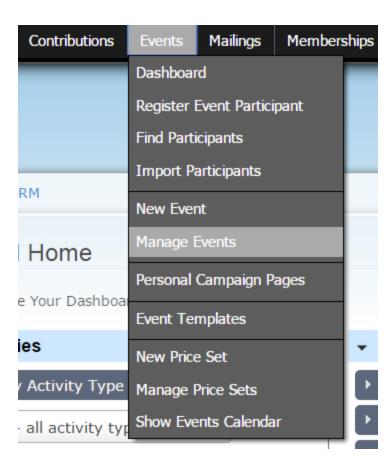
Contact Management



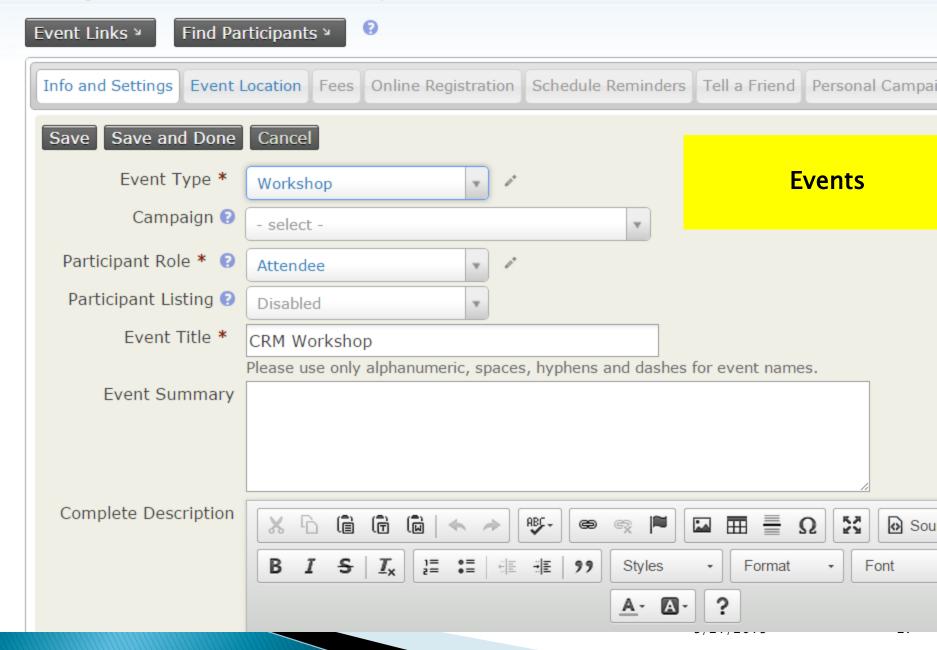
Contributions & Other Payments



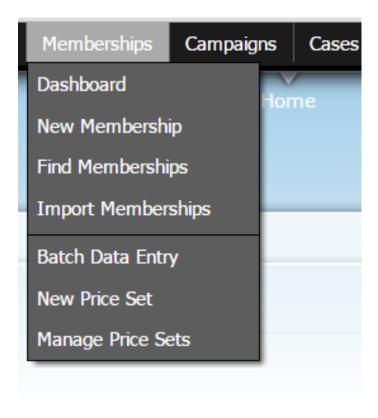
Events



Configure Event - CRM Workshop



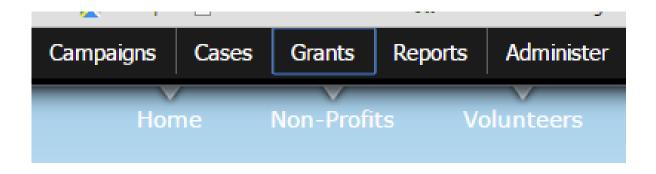
Membership Management





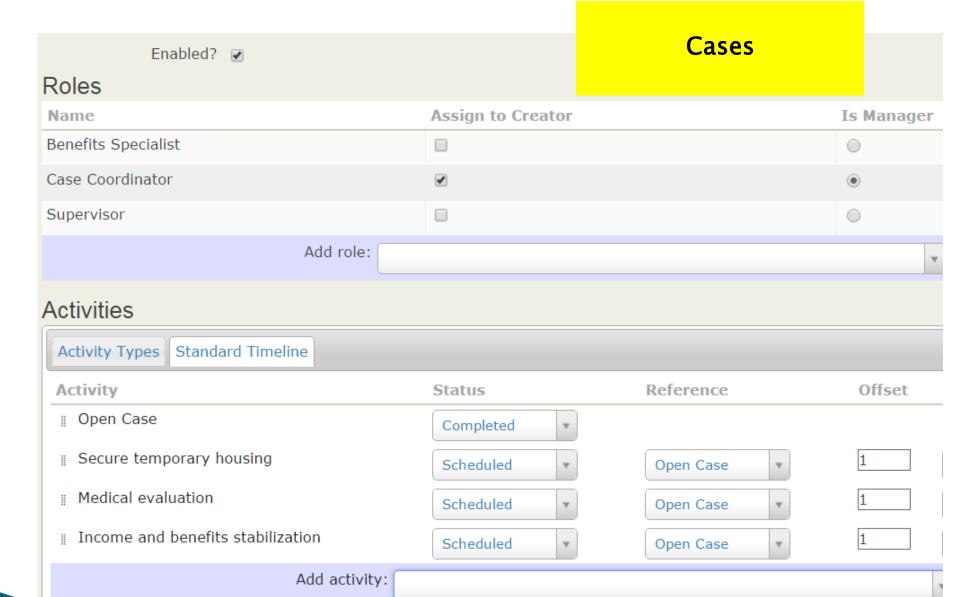
Name *	Member
	e.g. 'Student', 'Senior', 'Honor Society'
Description	Memberships Memberships
	Description of this membership type for internal use. May include eligibili
Membership	NuBay Services Corporation Q
Organization *	Members assigned this membership type belong to which organization (e.g. this is for membership in 'Save the Whales - Northwest Chapter'). NOTE: This organization/group/chapter must exist as a CiviCRM Organization type contact.
Minimum Fee	\$
	Minimum fee required for this membership type. For free/complimentary memberships - set minimum fee to zero (0).
Financial Type *	Member Dues
	Select the financial type assigned to fees for this membership type (for example 'Membership Fees'). This is required for all membership types - including free or complimentary memberships.
Auto-renew Option	ONo auto-renew option Give option, but not required Auto-renew required
	1 year v
Duration Unit *	Duration of this membership (e.g. 30 days, 2 months, 5 years, 1 lifetime)
Membership Type	Rolling
Plan *	Select 'rolling' if membership periods begin at date of signup. Select 'fixed' if membership periods begin on a set calendar date.
Relationship Type	
	You cannot modify relationship type because there are membership records associated with this membership type.
	Memberships can be automatically granted to related contacts by selecting a Relationship Type. 🔞
Visible	Public v
	Is this membership type available for self-service signups ('Public') or assigned by CiviCRM 'staff' users only ('Admin')
Order	1
= 11 15	

And . . .



Extension name (key)	♦ Status
CiviCRM Export to Excel (ca.bidon.civiexportexcel)	Enabled
 Stripe (com.drastikbydesign.stripe) 	Enabled
► Event Calendar (com.osseed.eventcalendar)	Enabled
CiviVolunteer (org.civicrm.volunteer)	Disabled

5/21/2015



Cases



Summary of Involvement

	Ongoing	Resolved	Urgent	Preliminary
Housing Assistance	1	0	0	0
Demo Workflow	0	0	0	0
Adult Day Care Referral	0	0	0	0

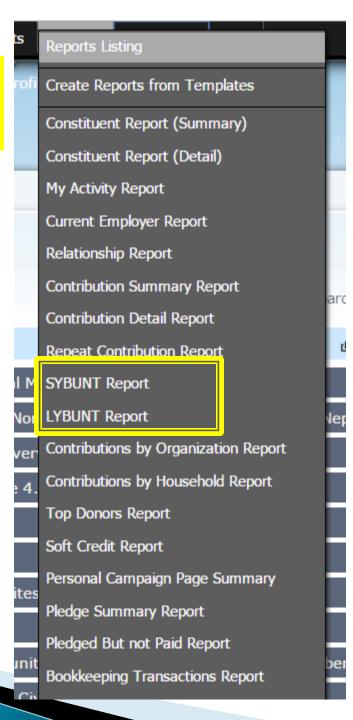
My Cases With Upcoming Activities

	Contact	Subject	Status	Туре	My Role	Manager	Next Sched.
•	Person, Demo 617-555-1212 Case ID: 22	Demo Housing	Ongoing	Housing Assistance	Homeless Services Coordinator	Admin, Nubay	Medical evalua April 16th, 20:

My Cases With Recently Performed Activities

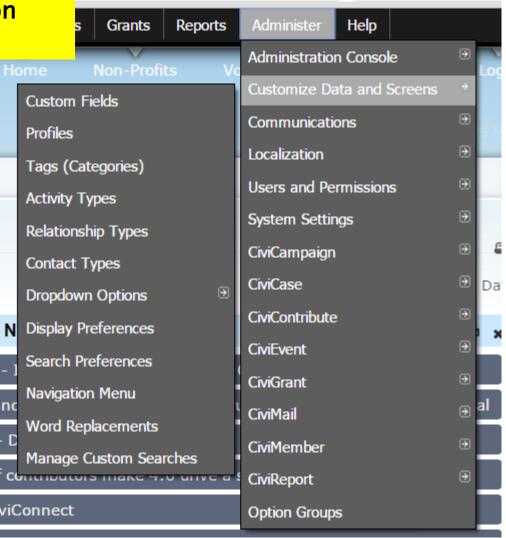
	Contact	Subject	Status	Туре	My Role	Manager	Most Recei
•	Person, Demo 617-555-1212 Case ID: 22	Demo Housing	Ongoing	Housing Assistance	Homeless Services Coordinator	Admin, Nubay	Email May 14th, 2

Reports



5/21/2015

Customization



Home > CiviCRM > Administer CiviCRM

Custom Data

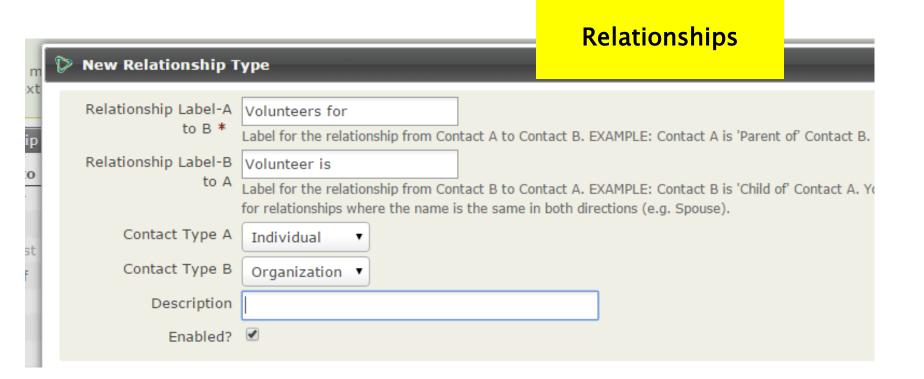
Custom data is stored in custom fields. Custom fields are organized into logically and store custom data which are not included in the standard CiviCRM forms. Yo

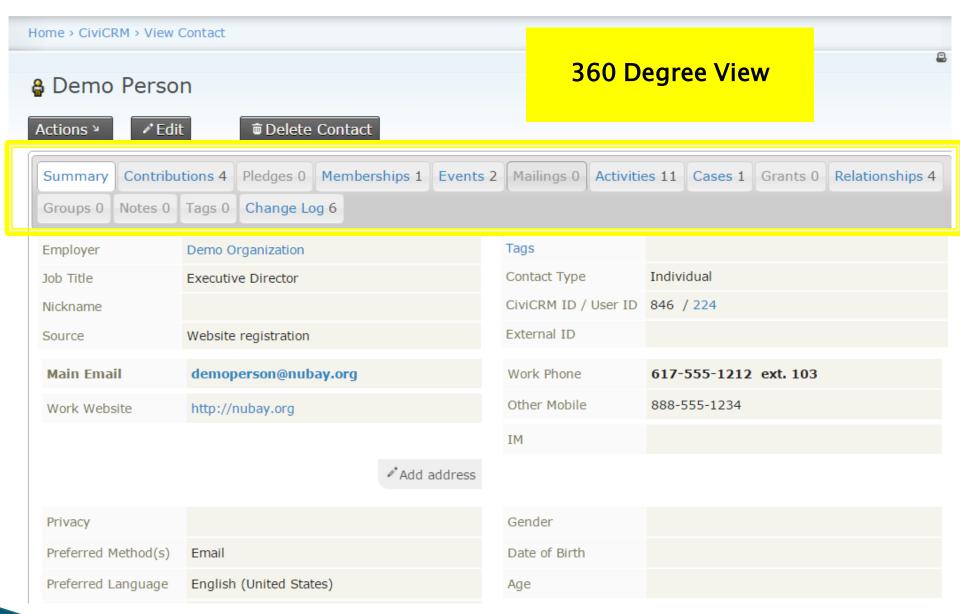
Set	Enabled?	Used For	Туре
Volunteer Information	Yes	Individual	Volunteer
Volunteer Info	Yes	All Contact Types	Any
NAA	No	All Contact Types	Any
Contact	Yes	Individual	Any
Demographics	Yes	Individual	Any
Org Information	Yes	Organization	Any
Contribution Info	Yes	Contributions	Any
Restricted Info	Yes	All Contact Types	Any
Player Review	Yes	Participants	2014 Season
Membership	Yes	Memberships	Any

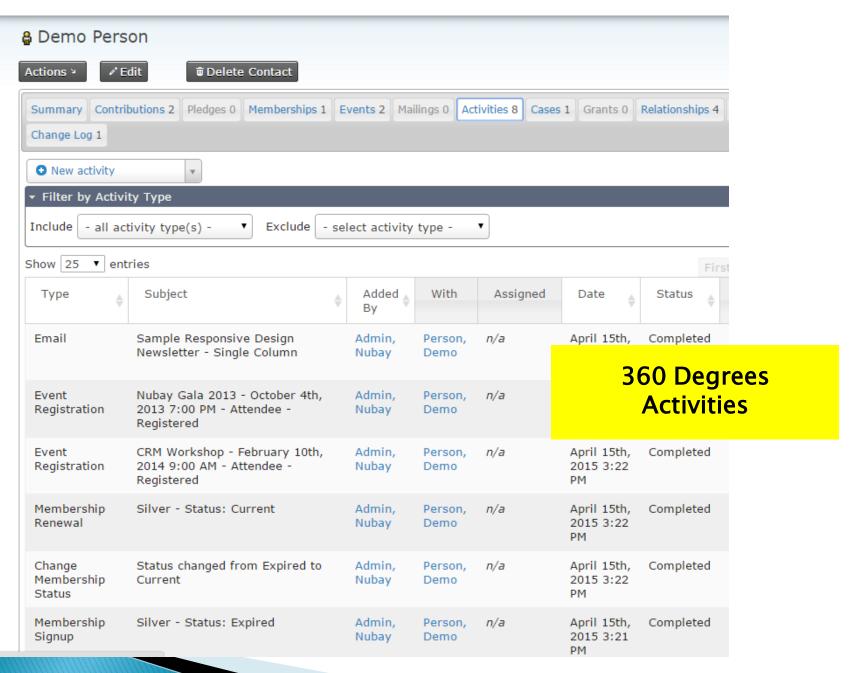
◆Add Set of Custom Fields

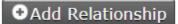
•Add Relationship Type

Relationship A to B	•	Relationship B to A	\$	Contact Type A	$\stackrel{\mathbb{A}}{\triangledown}$	Contact Type B
Account Manager		Account Manager		All Contacts		All Contacts
Assistant to		Assisted by		All Contacts		All Contacts
Benefits Specialist is		Benefits Specialist		Individual		Individual
Board Member of		Board Members		Individual		Organization
Child of		Parent of		Individual		Individual
Contact for		Assigned to		All Contacts		Organization
Employee of		Employer of	Dolosi	Bullette saletas		Organization
Genius for		Genius for	Relationships			Organization
Gifts matched by		Matching gifts for				Organization
Head of Household for		Head of Household is		Individual		Household
Health Services Coordinator is		Health Services Coordi	nator	Individual		Individual
Homeless Services Coordinator is		Homeless Services Coo	rdinator	Individual		Individual
Household Member of		Household Member is		Individual		Household
Member of		Member		All Contacts		Organization
Partner of		Partner of		Individual		Individual
Referred by		Referred		All Contacts		All Contacts
Senior Services Coordinator is		Senior Services Coordi	nator	Individual		Individual
Sibling of		Sibling of		Individual		Individual
Spouse of		Spouse of		Individual		Individual

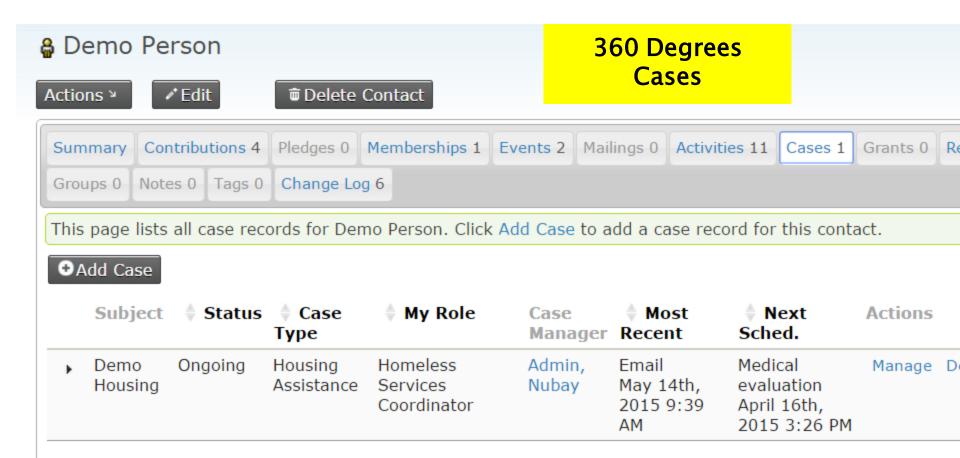








Current Relationships Show 10 ▼ entries Relationship | State/Prov | Start 🏺 End 🌲 City | Employee of Demo Organization Volunteer for NuBay 360 Degrees Services Relationships Corporation Gifts matched NuBay by Services Corporation Homeless Admin, April Newton MΑ Services Nubay 15th, Coordinator is 2015



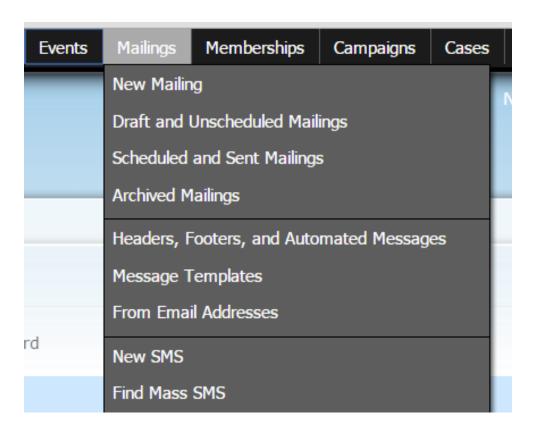
5/21/2015

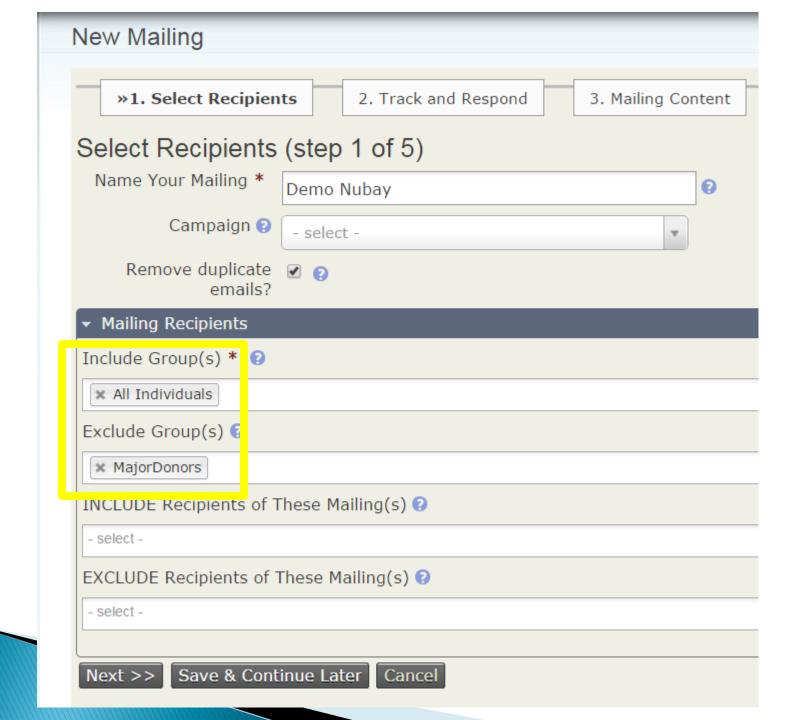


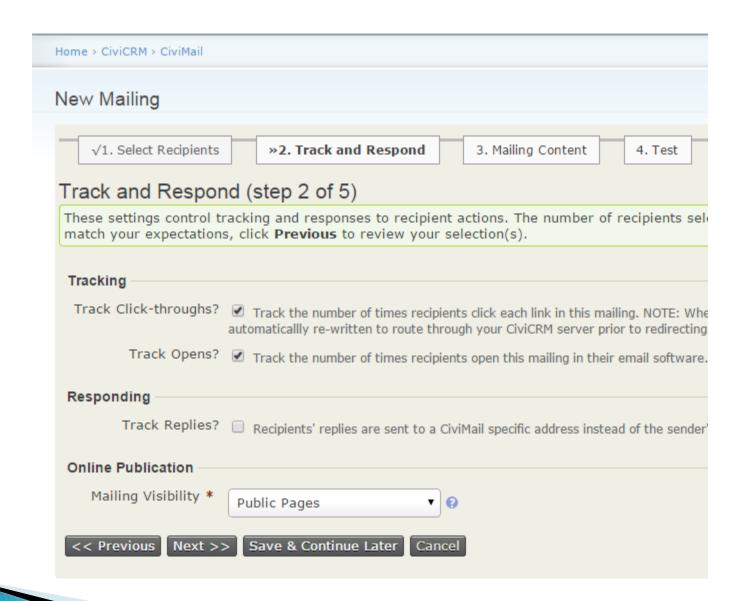
CiviMail

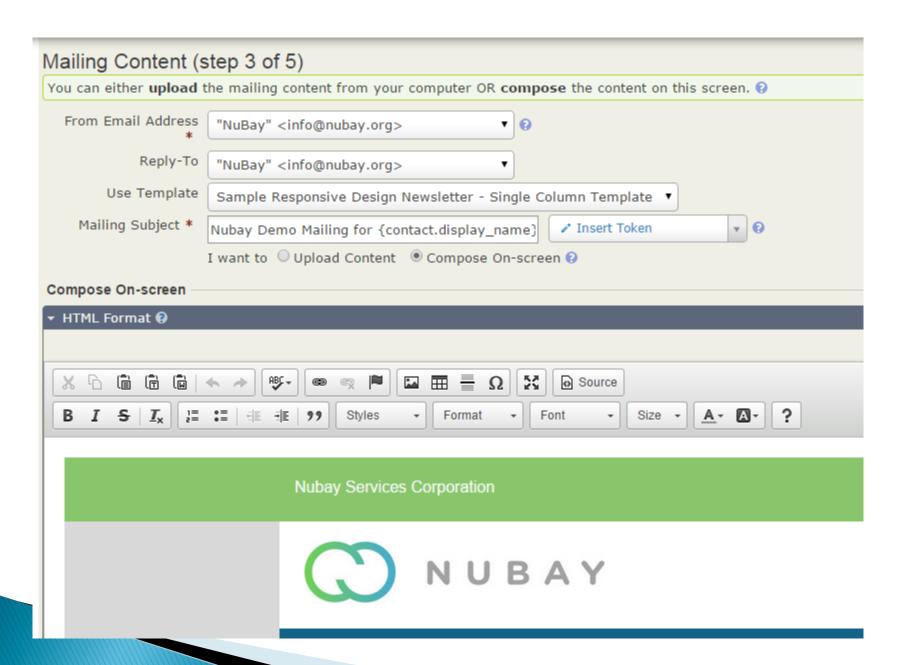
5/21/2015

Mailings

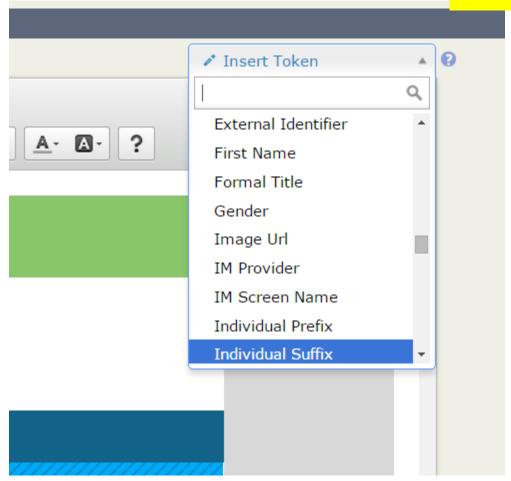




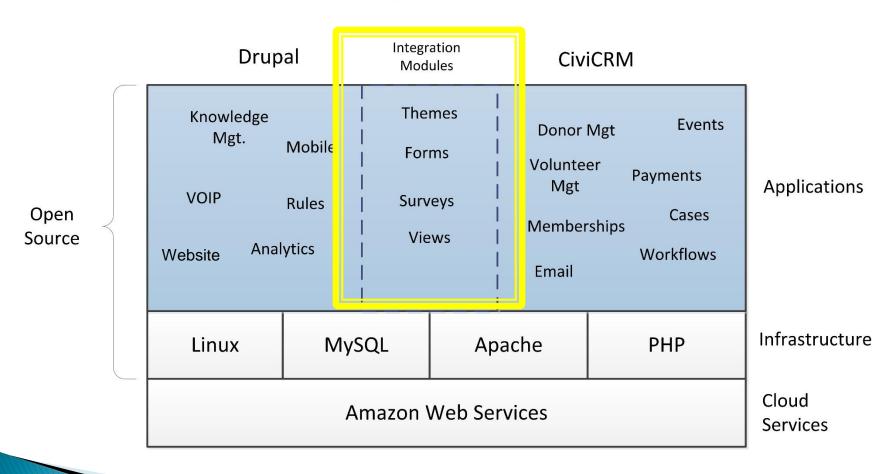




Access to all database fields as email tokens



Nubay Platform





- CIVICRM

ENABLED	NAME	VERSION
€	CiviCRM	4.5.7
P	CiviCRM Contact Reference Field	4.5.7
•	CiviCRM OG Sync	4.5.7
•	CiviCRM Rules Integration	4.5.7
•	CiviCRM Theme	4.5.7
	CiviEngage	4.5.7
•	CiviGroup Roles Sync	4.5.7
•	CiviMember Roles Sync	4.5.7
•	Webform CiviCRM Integration	7.x- 4.10

CiviCRM Drupal Modules



Views Integration

Views integration settings

To enable CiviCRM Views integration, add the following to the site settings.php file:

```
$databases['default']['default']['prefix']= array(
  'default' => '',
  'civicrm acl'
                                               => '`civicrm`.'
                                              => '`civicrm`.
  'civicrm acl cache'
  'civicrm acl contact cache'
                                              => '`civicrm`.
                                              => '`civicrm`
  'civicrm_acl_entity_role'
                                              => '`civicrm`
  'civicrm_action_log'
  'civicrm action mapping'
                                             => '`civicrm`.
                                             => '`civicrm`
  'civicrm_action_schedule'
  'civicrm_activity'
                                              => '`civicrm`
                                              => '`civicrm`.
  'civicrm activity contact'
                                              => '`civicrm`
  'civicrm_address'
                                              => '`civicrm`
  'civicrm address format'
                                              => '`civicrm`.
  'civicrm batch'
  'civicrm_cache'
                                              => '`civicrm`
                                              => '`civicrm`
  'civicrm_campaign'
                                              => '`civicrm`.
  'civicrm campaign group'
                                              => '`civicrm`
  'civicrm case'
                                              => '`civicrm`
  'civicrm case activity'
  'civicrm case contact'
                                              => '`civicrm`.
                                              => '`civicrm`
  'civicrm case type'
                                              => '`civicrm`
  'civicrm_component'
                                              => '`civicrm`.
  'civicrm contact'
                                              => '`civicrm`
  'civicrm_contact_type'
                                              => '`civicrm`
  'civicrm_contribution'
  'civicrm contribution page'
                                              => '`civicrm`.
                                              => '`civicrm`
  'civicrm contribution product'
                                              => '`civicrm`
  'civicrm_contribution_recur'
                                              => '`civicrm`.
  'civicrm contribution soft'
  'civicrm_contribution_widget'
                                              => '`civicrm`
                                              => '`civicrm`.
  'civicrm_country'
                                              => '`civicrm`.',
  'civicrm county'
```

5



Webforms

5/21/2015



Home

Non-Profits

Volunteers

Contact Us

Login

Home » Nubay Ten Registration

Nubay Ten Registration

Thanks for your interest in becoming a Nubay Ten volunteer.

Please complete this form and we'll contact you to discuss your specific interests. If you are ready to make a commitment, please select from the list. Of course, you can modify your commitment level at any time.

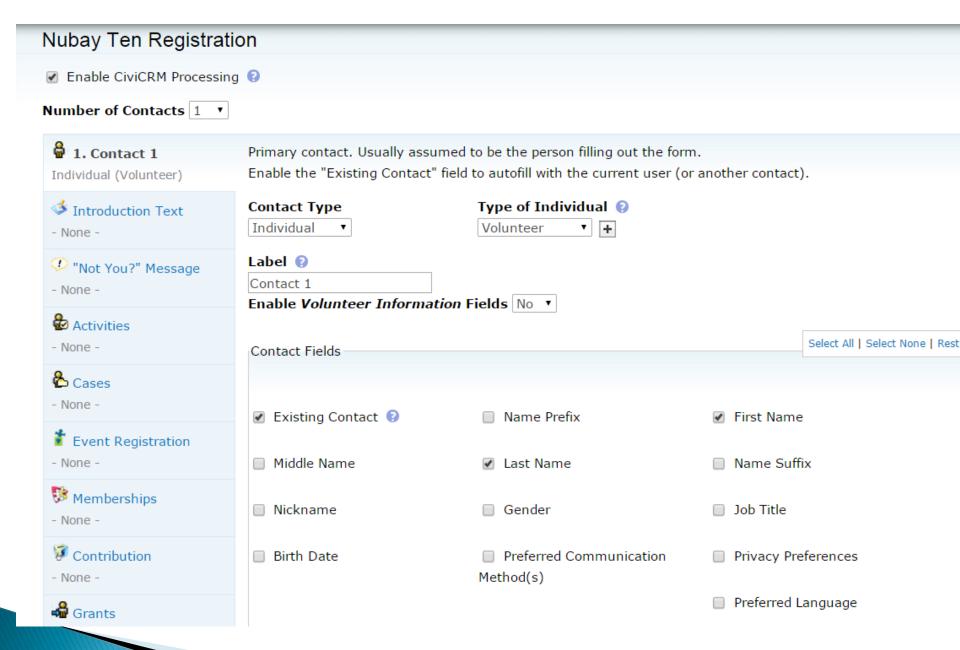
lubay Ten Registration
irst Name *
ast Name *
Organization
hone Number
mail *

Home » Non Profit Technology Survey » Edit Webform Non Profit Technology Survey

View Edit Webform Results Track CiviCRM Convert Log

Title *

Non Profit Technology Survey



Nubay Ten Registration

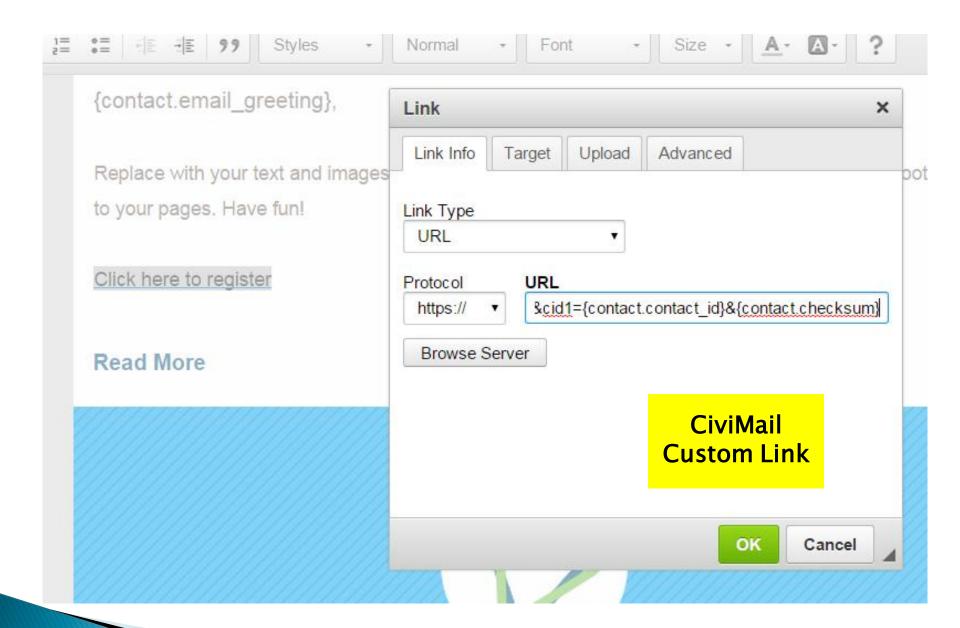
Enable CiviCRM Processing

Number of Contacts 1

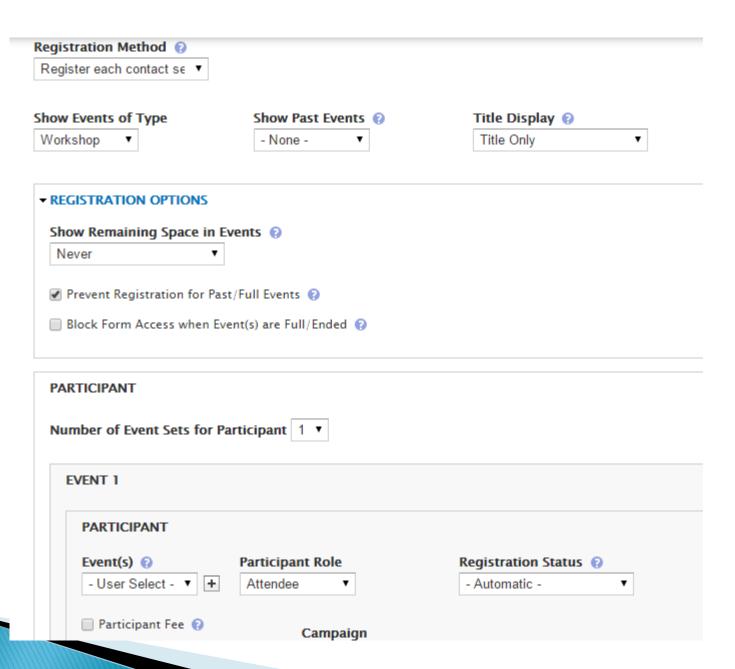
```
Individual (Volunteer)

https://nubay.org/?q=content/nubay-ten-
registration&cid1={contact.contact_id}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{content/solution}&{cont
```

5/21/2015



5/21/2015

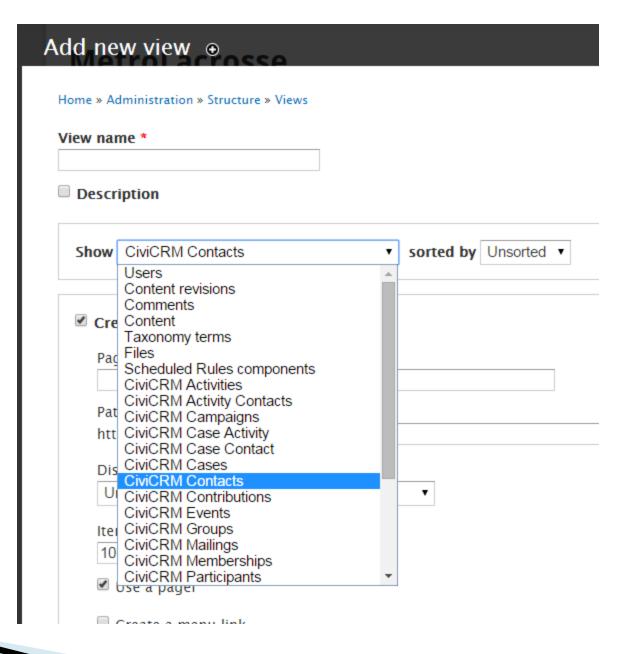






Views

5/21/2015





	Add fields For All displays ▼					
(CiviCRM Custom: Volunteer Info: Organization Custom Data Field					
(CiviCRM Custom: Volunteer Info: Skill Notes Custom Data Field					
(CiviCRM Custom: Volunteer Info: Skills Custom Data Field					
(CiviCRM Custom: Volunteer Information: Camera Skill Level Custom Data Field					
(CiviCRM Drupal match table: Domain ID Relates a CiviCRM contact to its domain					
(CiviCRM Drupal match table: Drupal User ID The user id of the User matched to a CiviCRM Contact					
(CiviCRM Email: Email Address Email Address					

Home » Volunteers » Nubay Volunteers

Nubay Volunteers

Last Name	First Name	Skills
Bl	Scott	App-Support
Cı	Edna	App-Support
Da	Patrick	App-Support
Fir	Terry	
Fr	Bob	App-Support
Gr	Dan	Web-design
Ka	Daniel	
Kii	Adam	
Le	Michael	Amazon
M	Greg	App-Support

1 2 3 next > last »

Other Things Views and CiviCRM Can Do

- Lists of upcoming events
- Building reports on contributions, activities or event registrants
- Honor roll listing of recent donors
- · Staff, board of directors or committee lists
- A list of current members
- ...and more!



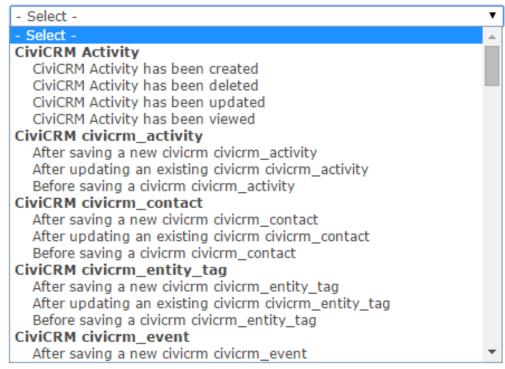
Rules

5/21/2015

Adding event to reaction rule "CiviCRM-Rule-Example"

Select the event to add. However note that all added events need to provide all variables:

React on event *



Add a new condition

Home > Administration > Configuration > Workflow > Rules > Editing reaction rule "CiviCRM-Rule-Ex

Add a new condition

Compare two data values of the same type with each other.

Data to compare

The data to be compared, specified by using a data selector, e.g. "node:author:name".

Data selector *

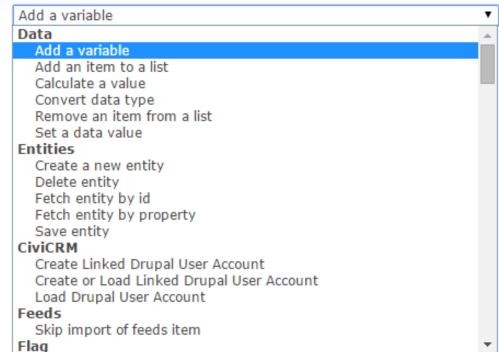
```
civicrm-contact:
civicrm-contact:civi-user:... (Drupal User)
civicrm-contact:id (Internal Contact ID)
civicrm-contact:contact-type (Contact Type)
civicrm-contact:contact-sub-type (Contact Subtype)
civicrm-contact:do-not-email (Do Not Email)
civicrm-contact:do-not-phone (Do Not Phone)
civicrm-contact:do-not-mail (Do Not Mail)
civicrm-contact:do-not-sms (Do Not Sms)
civicrm-contact:do-not-trade (Do Not Trade)
civicrm-contact:is-opt-out (No Bulk Emails (User Opt Out))
civicrm-contact:legal-identifier (Legal Identifier)
civicrm-contact:external-identifier (External Identifier)
civicrm-contact:sort-name (Sort Name)
civicrm-contact:display-name (Display Name)
civicrm-contact:nick-name (Nickname)
civicrm-contact:legal-name (Legal Name)
civicrm-contact:image-URL (Image Url)
```

Add a new action

Home > Administration > Configuration > Workflow > Rules > Editing reaction rule "CiviCF

Add a new action

Select the action to add

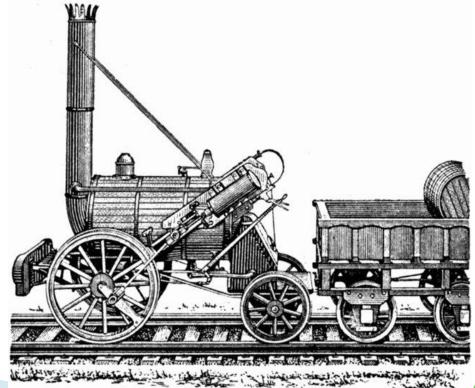


Outcomes - Measurement

"I have been struck again and again by how important measurement is to improving the human

condition"

Bill Gates





The Vision Fund

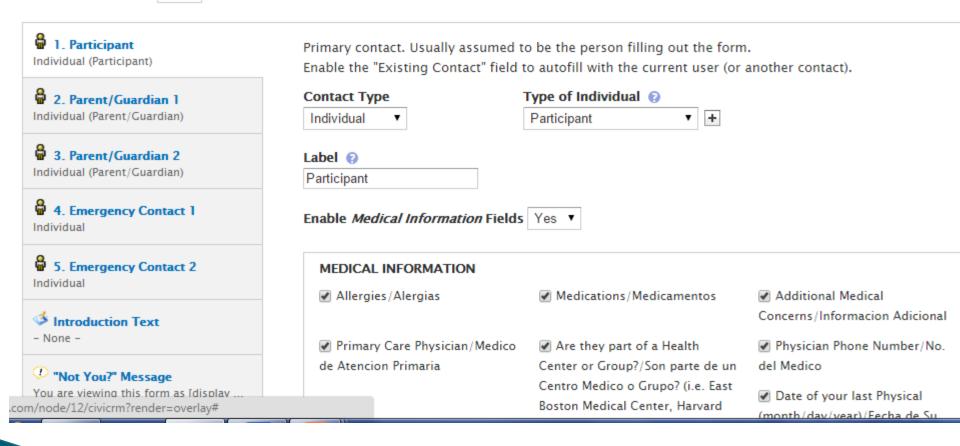






✓ Enable CiviCRM Processing ②

Number of Contacts 5 ▼



5/21/2015

Add Outcomes Metrics to **Registration Form**

Enable Outcomes Metrics Fields Yes •

OUTCOMES METRICS

- ✓ Parent Goal Primary
- ✓ Parent Assessment Fitness and Health
- Parent Assessment -Relationship
- ✓ Participant Goal Other/Participante - Otra Meta

- ✓ Parent Goal Other
- ✓ Parent Assessment Athletic Skills
- Parent Assessment Other
- ✓ Participant Primary Goal/Participante - Meta Primaria

5/21/2015 74

Add fields **Create Drupal View** For All displays Custom Data Field CiviCRM Custom: Outcomes Metrics: Parent Assessment - Athletic Skills Custom Data Field CiviCRM Custom: Outcomes Metrics: Parent Assessment - Fitness and Health Custom Data Field CiviCRM Custom: Outcomes Metrics: Parent Assessment - Other Custom Data Field CiviCRM Custom: Outcomes Metrics: Parent Assessment - Relationship Custom Data Field CiviCRM Custom: Outcomes Metrics: Parent Goal - Other Apply (all displays) Cancel Custom Data Field Apply (all displays) Cancel

Coaches Access View

Player-goals

Program Level/Nivel

High School (9th-12th Grade) ▼ Apply

		Parent Goal - Primary	Goal - Other	Goal/Participante - Meta Primaria	Participant - Goal Other/Participante - Otra Meta
Am					
Eile		Improve Fitness and Health/Mejorar la Aptitud Fisica		Make Friends/Hacer Amistades	
Jen	a	Develop Relationship Skills/Desarrollar Habilidades Interpersonales		Other Goal/Otra Meta	never give up
Lin		Develop Athletic Skills/Desarrollar Habilidades Atleticas		Get Exercise/Ejercicio	

Our Vision

Making this platform the standard for non-profits

Would you like to help?



Questions?



"I wasn't paying attention. Could you please repeat your speech?"