

# Implementing User Portals: Leveraging the Power of CiviCRM

David Doligalski, BackOffice Thinking  
Justin Thongsavanh, Comfort Zone Camp



**BackOffice**  
Thinking



# Implementing User Portals

- Who is Comfort Zone Camp?
- Legacy platform
- Analysis / Design / Buildout
- Site Walkthrough
- Summary / Q&A

# What is Comfort Zone Camp?



- The nation's largest bereavement camp.
- Camps are offered free of charge to children ages 5-25 who have experienced the death of a parent, sibling, or guardian.
- Camps are held year-round in California, Florida, Massachusetts, New Jersey, North Carolina, and Virginia.



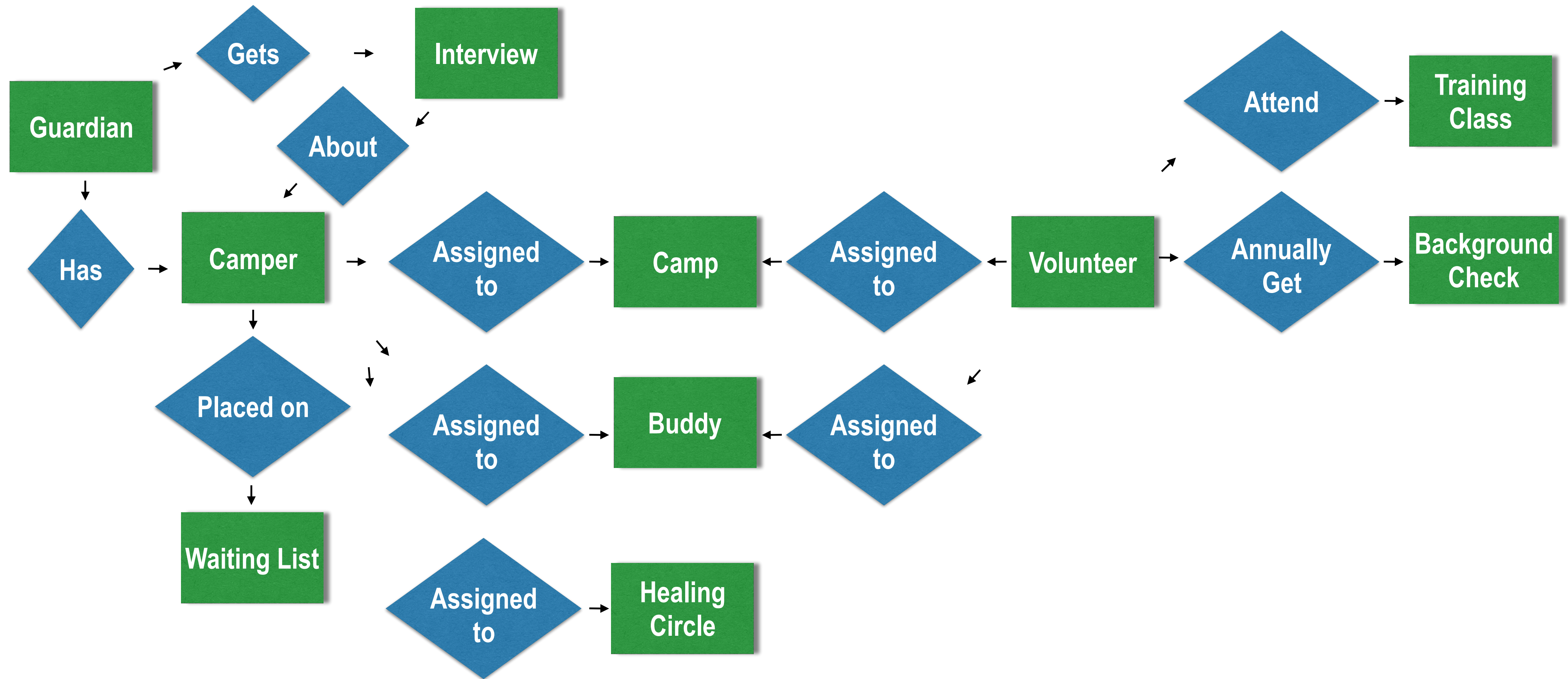
# How Comfort Zone Helps



- Camps create an environment where grieving children can have fun and break the isolation death often brings, while learning valuable coping skills for their daily lives.
- Our unique matching process allows each camper to be matched 1:1 with an adult Big Buddy based off of their unique interests and needs. The Big Buddy is a friend and mentor and provides emotional support
- Comfort Zone also hosts grief support groups, psycho-educational workshops for adults, children, and teens throughout the year, providing a network of support for the whole family and community.



# Entity Relationship Model

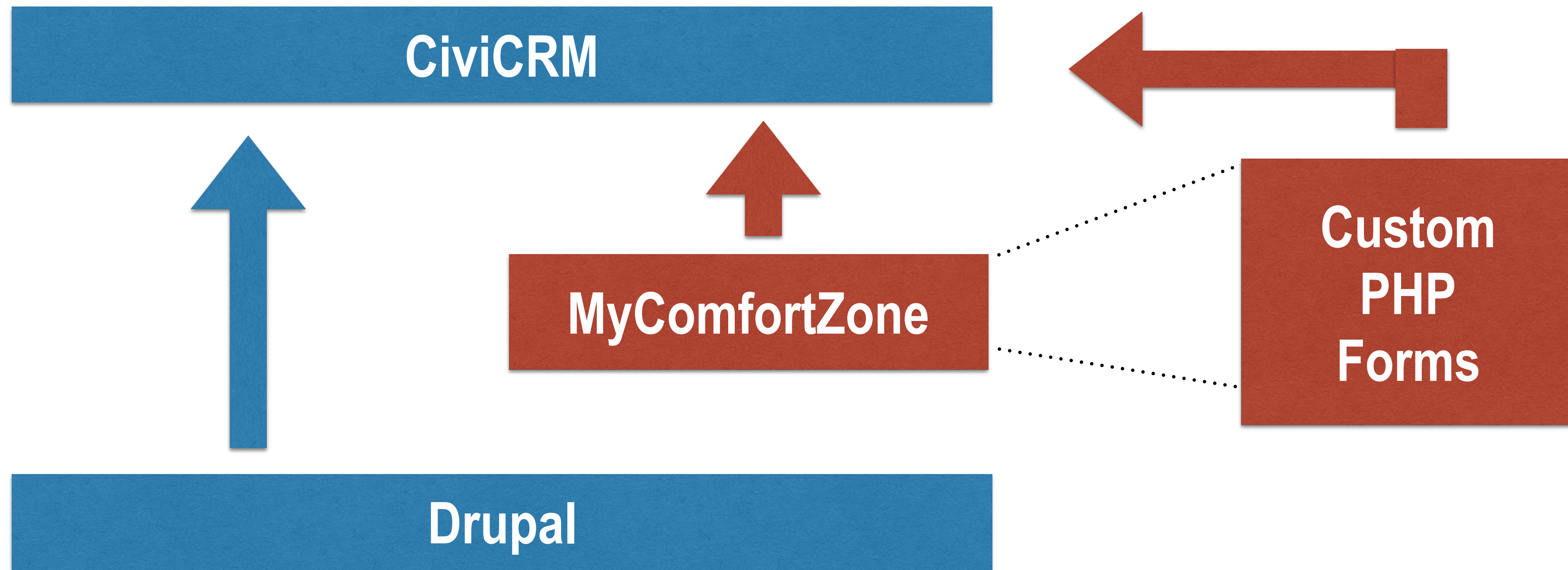


# Legacy System

- Drupal 6 / CiviCRM 3.4
- Added layer of obfuscation
- Lost data!
- Lengthy manual processes required
- 40 page manual to just process incoming camper
- Any changes risked breakage
- Staff had no faith in system



# Legacy Platform- Added Layer of Obfuscation



# Requirements / Specifications

- Interviews, Reviews — many hours
- Use cases - 27
- Functional specification
- Technical specification
- Data migration specification
- Mockups
- Legacy Site Change Specification

### Campers Screen

CZC Logo & Header

My Dashboard My Campers Volunteer Jane P. Doe v

CAMPERS ADD A CHILD

### CZC Use Case

Use Case: 022 (Version 1.0)

Name: Enroll in Volunteer Training Session

Description: Volunteer selects training session to attend

Primary Actor: Volunteer

Preconditions: User is logged in as a volunteer

Trigger: User clicks on the "Enroll" button

Basic Flow:

Alternate Flow:

Notes:

### Functional Components

Use Case	Component	Functionality
Register User : UC001	Webform with CiviCRM Integration	Unauthenticated users access registration via a link on the website. 1) Linked Drupal webforms for account creation, basic information, loss information. a) CiviCRM dedupe rules are configured to reduce duplicate contacts b) Drupal account rules will prevent duplicate accounts c) User is created as a head of household (as an attribute, not a type) d) The webform submission will link back to the User Dashboard e) A customized Drupal welcome email message is sent (limited customization is available, it cannot be specific to the type of registration that is done) f) Form errors are displayed to user using standard Webform or Drupal error messages

Enroll in Volunteer Training Session : UC022	Accessed by authenticated volunteers from dashboard. 1. Drupal view of upcoming training sessions is displayed accompanied with button/link to "Enroll" on each session. a. <b>Drupal view includes filtering on state/region</b> 2. Upon click of enroll button/link	Create a drupal view for events to display upcoming training sessions: View header - Volunteer Training Calendar Fields: • Event Date • Event name
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	a. Add as enrolled participant in specific training session b. Send confirmation email to volunteer c. Set system message confirming enrollment d. Return to dashboard.	<ul style="list-style-type: none"> <li>• Number of participants</li> <li>• Event Location</li> <li>• Register button</li> </ul> Filter: <ul style="list-style-type: none"> <li>• Event Type - Volunteer Training Session</li> <li>• Event End date &gt;= Current date</li> <li>• is_active = True</li> </ul> Add a pager to show 15 events on a page.  Add custom functionality for Register button: <ul style="list-style-type: none"> <li>• Add a function in the module file which calls civi api to create a new participant record for the logged in user with status 'enrolled'</li> <li>• Send message template ID 64 to volunteer</li> <li>• Set system message confirming enrollment - You have been enrolled to {Event Name}</li> <li>• Redirect to dashboard.</li> </ul>
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...ATION LIST

...ation list

...on the James 015

...on 15

FORMS

(or other direct link)

...ashboard after login  
...gin failure

...oard.

...sed from UC001)

...tion with current data populated  
...ional fields only)

...returns the user to the Dashboard



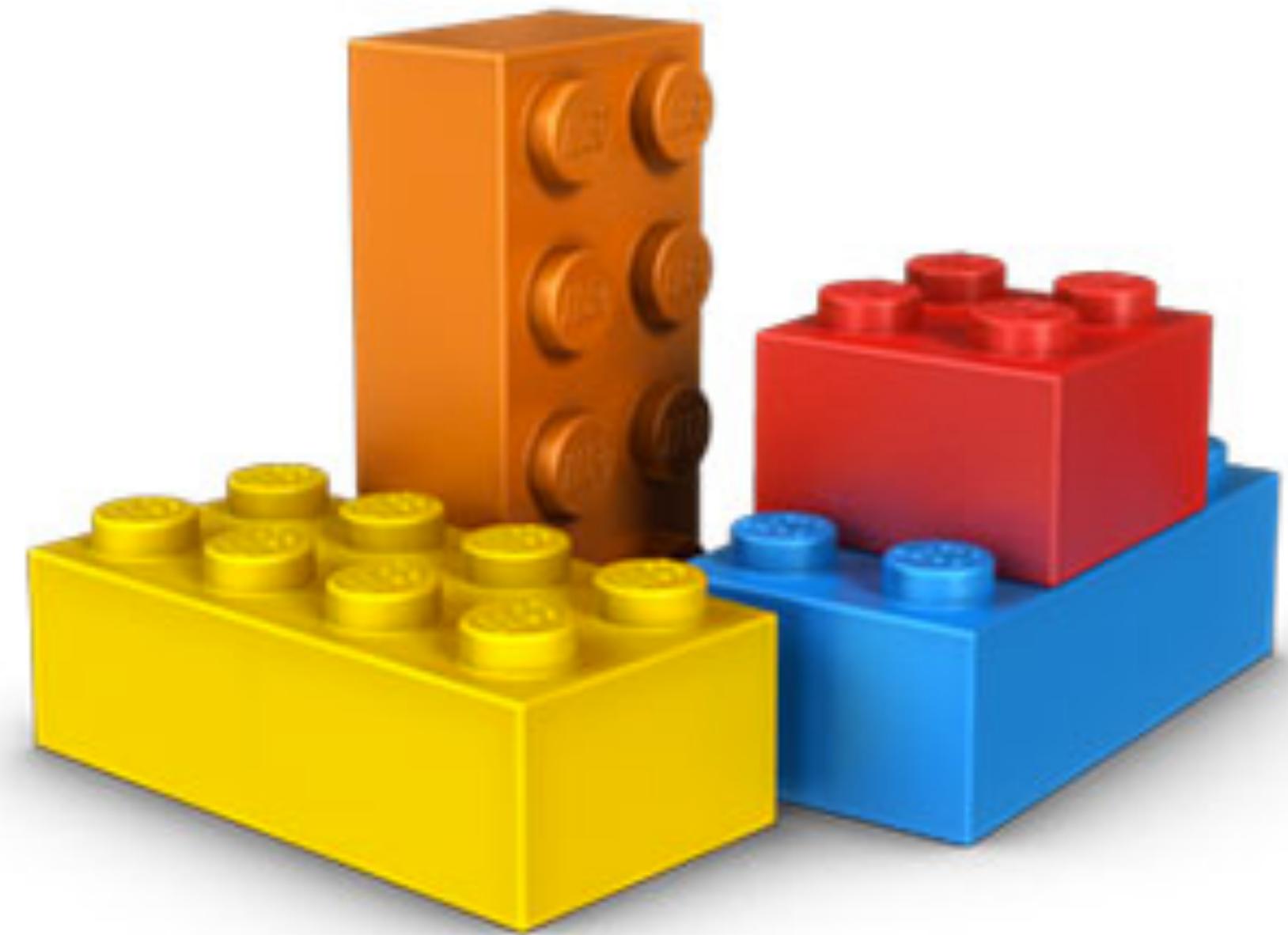
# Business Processes

- Define current processes
- Ask why?
- Challenge the norm
- Refine processes to best utilize CiviCRM's design



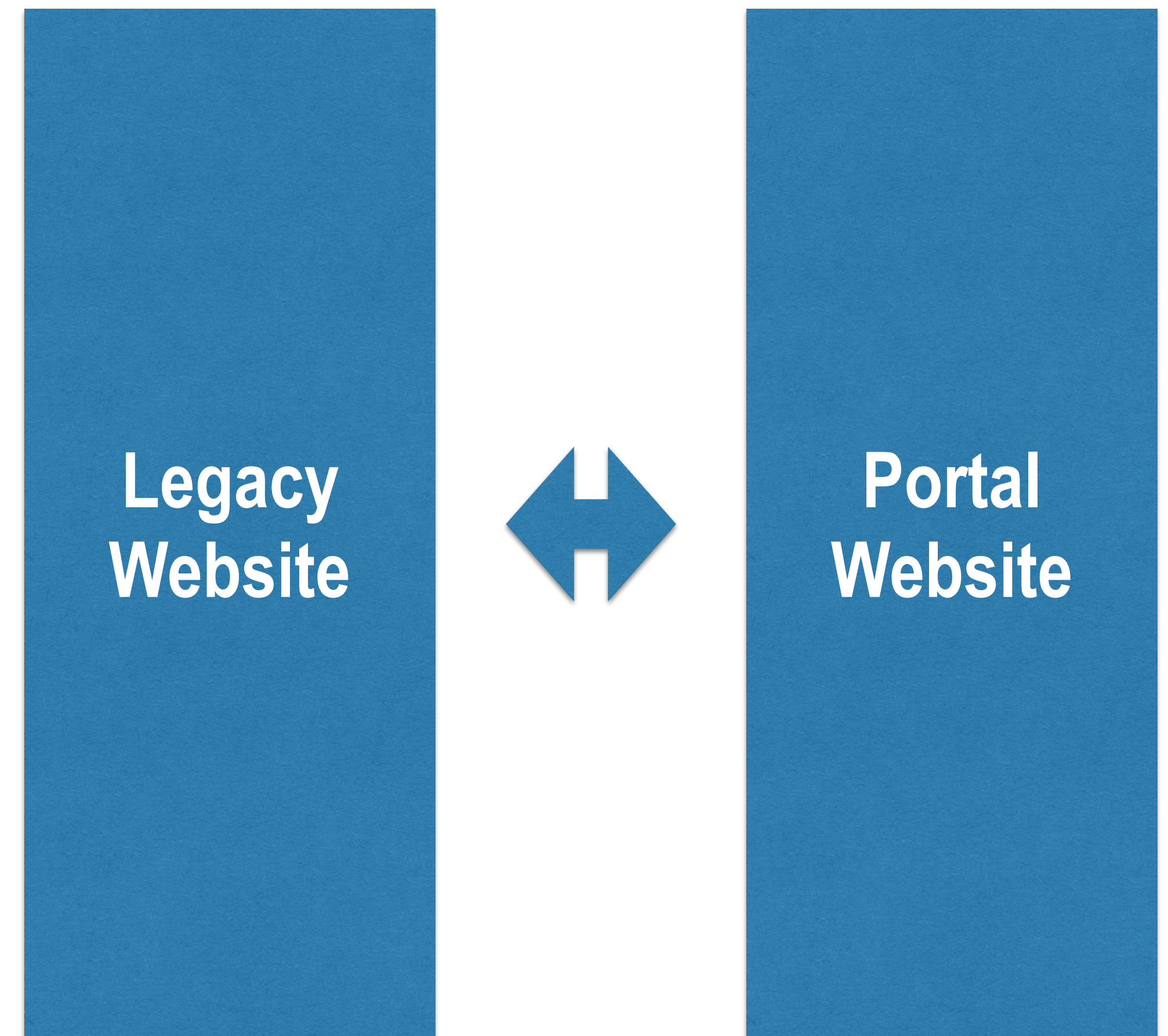
# Architecture

- Leverage the best of all worlds:
  - Drupal Login to manage accounts with associated Roles
  - Drupal Views — perfect for tabular displays — i.e., Lists (camps, training classes, campers)
  - CiviCRM Profiles — most basic forms
  - Drupal Webforms — advanced forms — validation
  - Jasper reports — complex reporting needs
  - Exceptional Look/Feel design and execution



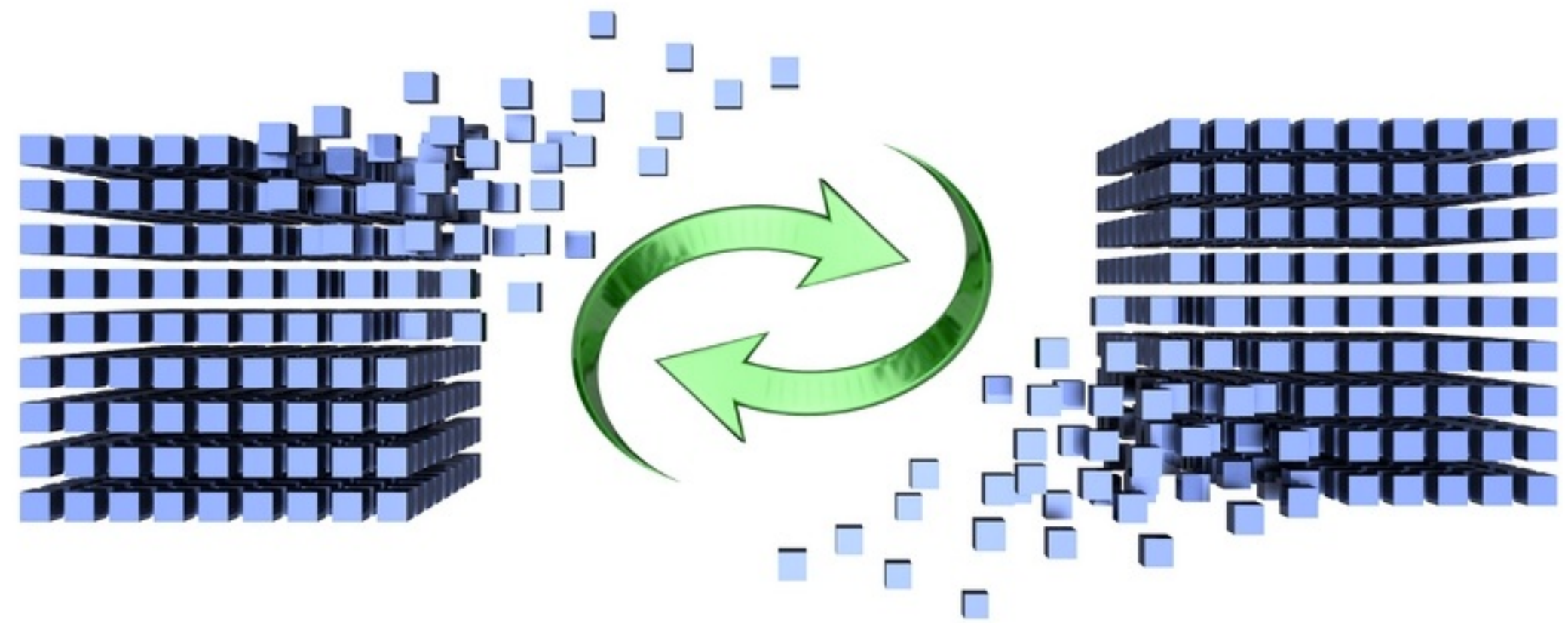
# Integration with Legacy Site

- Existing D6 site retained and converted to informational site
- New, D7, Portal site created as subdomain: my.comfortzonecamp.org
- Links on D6 site that previously went to legacy forms, redirected to portal
- Legacy site Calendar's converted to RSS feeds of Views from Portal
- Contribution form links simply changed to point to portal contribution form



# Data Migration- ETL

- Contacts
  - Guardians (Drupal users as well)
  - Campers (are possible Guardians too!)
  - Volunteers
  - Losses
- Custom Data
- Relationships
- Events
- Participants





# Buildout

- Project Management - Redmine
  - Tasks generally under 8 hours
  - Weekly internal meetings
  - Manage to Milestones using 2-Week Sprints
- Regular Status Calls with Client
  - Weekly
  - Monthly with Management
- Custom Coding
- Quality Assurance using Use Cases



# Site Walkthrough

# Results

- Manuals? We don't need no stinkin' manual!
- Comments from constituents....  
"That's all?"
- Ease of use for grieving users
- Greatly improved business processes
- No more lost data!!
- Staff has gained confidence in CiviCRM





# Contact

- Dave Doligalski  
BackOffice Thinking  
[ddoligalski@backofficethinking.com](mailto:ddoligalski@backofficethinking.com)  
610-709-6570  
[backofficethinking.com](http://backofficethinking.com)
- Justin Thongsavanh  
Comfort Zone Camp  
[justint@comfortzonecamp.org](mailto:justint@comfortzonecamp.org)  
310-781-1032  
[comfortzonecamp.org](http://comfortzonecamp.org)

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 CiviTeacher  CiviDesk  CiviSMTP  AGH Strategies