



Data Administrator

Website Overview

DA Responsibilities

- Manage memberships
 - Create/update member contact records
 - Update membership information
 - Manage member “roles”
 - Verify Member Roster
- Manage scholar awards
 - Create/update scholar contact records
 - Add award information
 - Verify Scholar Lists



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Centralize constituent communications



Build and manage your donor base & membership



Full integration with **Wordpress**, **Drupal**, **Joomla** & **Backdrop**.

ORGANIZATIONS USE CIVICRM... A LOT

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We're the leading open-source CMS for ambitious digital experiences that reach your audience across multiple channels.

Because we all have different needs, Drupal allows you to create a unique space in a world of cookie-cutter solutions.



Drupal for **Developers**

*Download Drupal and
build the open web*



Drupal for **Marketers**

*In a world full of templates,
be original*



Drupal for **Agencies**

*Achieve your
clients' ambition*

CiviCRM vs Drupal

- CiviCRM
 - Manage contacts (members, scholars, organizations)
 - Manage memberships
 - Manage scholar awards
 - Set up events
 - Send mailings
- Drupal
 - Public facing web pages
 - Used for single sign-on
 - Manage roles for users
 - Views of CviCRM Data

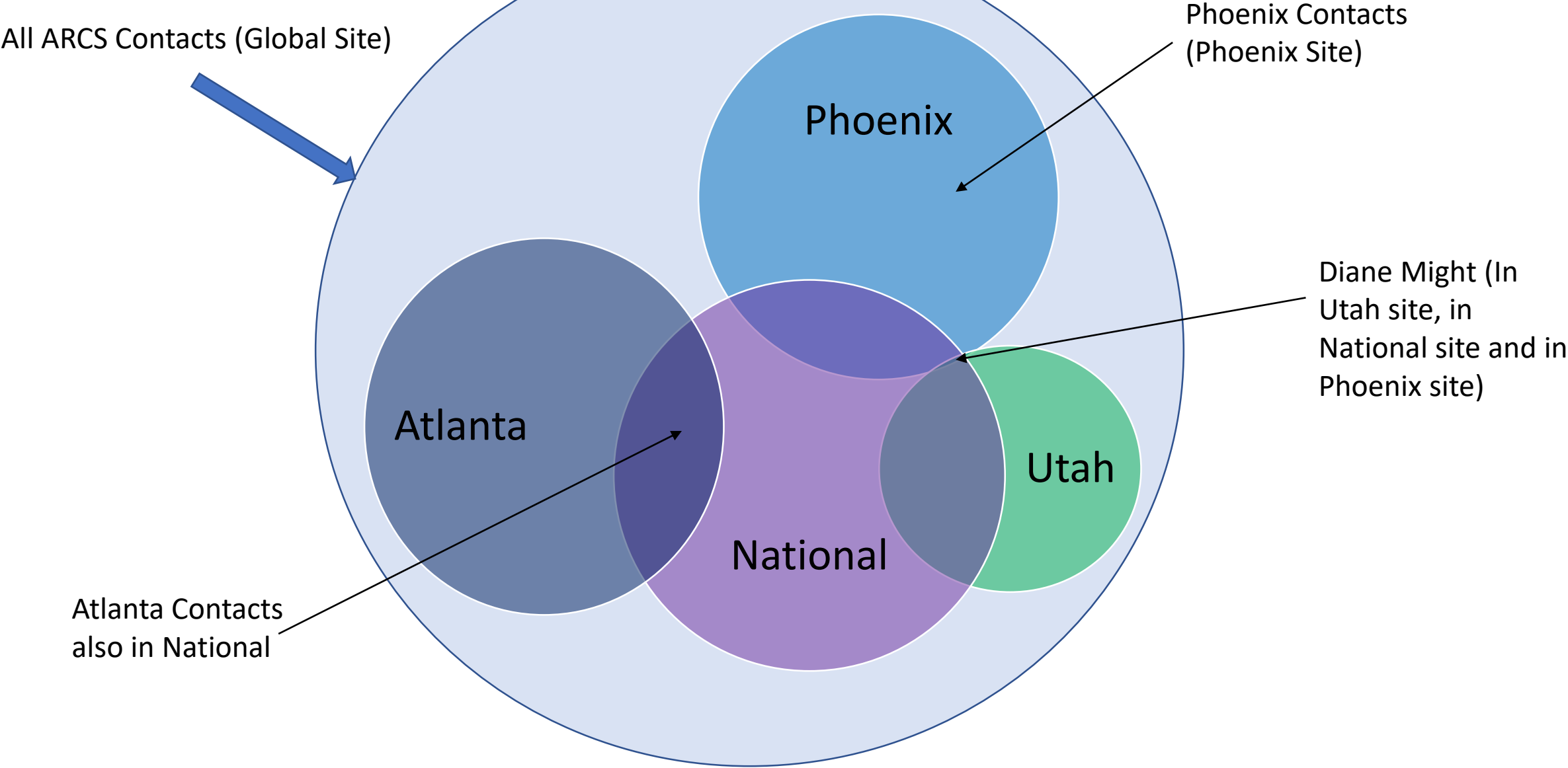
Navigation

- Public vs “member only”
- General member vs “site admin”
- Drupal menu vs CiviCRM menu
- What site are you viewing?
- CiviCRM menu

Contacts

- A contact is a collection of demographic information (name, address, phone, email, etc.)
- Individual or organization
- Individual (subtype Scholar)
- Organization (subtypes ARCS Chapter, Academic Partner)
- All CiviCRM work is centered around contacts
- Contacts can have relationships with other contacts
- Contacts are very “Primary Email” oriented

Multi-Site Implementation



Memberships

- Membership Dashboard
- Membership Searches
- Membership Renewals
 - Manual editing
 - On-line
- Chapter Roster
- Membership Manuals

Scholars

- Scholars are a subtype of contact
- Scholars VS Awards
- Award date convention (always use a date for “Award Finalized” between Jan 1 – June 30 of the fiscal year.)
- Fill in as much information as possible for networking and My Portal reports
- Bulk loading of scholars

Organizing Contacts

- Groups
- Smart Groups
- Tags

Contacts vs Users

- Contacts are records in the CiviCRM database
- Users are a Drupal item. Users are allowed to log into the secure site.
- All users are contacts
- Not all contacts are users
- Manage users from the Drupal “People” menu item

My Profile Reports

- Drupal views of CiviCRM contacts, memberships and awards
- Controlled view into all the data in our database
 - All Contacts
 - All Members
 - Chapter Roster
 - Scholar reports

Other Functionality

- Document Library
- Email
 - CiviMail
 - Mosaico
- Events
- PAT'S Portal

Help

- General CiviCRM documentation
- “My Portal” website help
- CiviDesk Courses

is.help@arcsfoundation.org