



blackbaud®
**DEVELOPERS’
CONFERENCE**
June 15–17, 2021

Advanced Blackbaud TeamRaiser® Aggregation with Drupal

LUMINATE ONLINE®/ TEAMRAISER® TRACK

CADEN BURROSS, JEREMY ISETT

Session Host: Glen Hutson



Safe Harbor Statement

This presentation contains forward-looking statements that involve inherent risks, uncertainties and assumptions. It outlines Blackbaud's current plans and general product direction as of the date this presentation was created. Functionality described in this presentation that is not currently available is subject to change at any time, without notice, at Blackbaud's sole discretion. It does not represent a commitment to develop or release specific features within the timeframe discussed, according to the presented design, or at all. Please make any purchase decisions based on features and functionality that are currently available.



Customization of Blackbaud Solutions

As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users



Caden Burross

<https://www.linkedin.com/in/cadenburross>

AUSTIN, TX

DEVELOPER, MSKCC



Jeremy Isett

He/Him

<https://www.linkedin.com/in/jeremyisett/>

RALEIGH, NC

SOFTWARE ARCHITECT, PHASE2 TECHNOLOGY





TeamRaiser at MSK

- **Cycle for Survival**
- **Fred's Team**
- **Kids Walk for MSK Kids**
- **Community Events**
- **Giving Pages**

At MSK, we use TeamRaiser in a number of ways – from our peer-to-peer cycling events, to our marathon runs, and even our evergreen fundraising pages.

Each event is different, and has its own set of needs and limitations.



Cycle for Survival

- **Largest annual fundraising event at MSKCC**
- **More individuals and teams join every year**
- **Multiple individuals and teams from within larger organizations**
- **Individual and Team pages are created**
- **Organizations, as well as very large teams, have a national "footprint"**

The Opportunity

PageBuilder
reusables, s-tags,
and custom
Javascript used to
aggregate data

- **Page created to act as an “umbrella” for the larger organization or team.**
- **"National Teams"**
- **Very labor intensive for our internal dev team, required a lot of cross team communication to create a single page, and all distribution was independent.**
- **Event continues to grow, this was not going to scale**

A New Direction

Tighter integration into the Drupal CMS and our editorial processes.

- **Power of Luminate Online**
- **Readily available data through the API**
- **Freshly redesigned sites, utilizing Drupal**
- **Content creators familiar with the CMS, and it's flexible admin experience**
- **Reimagined 'umbrella' pages, as an integrated content type in Drupal, that would allow access to the data through the LO API**
- **Empowered Content Creators to build these aggregate pages themselves**



Development Requirements

They wanted a seamless editorial experience for novice users.

Caden, and the MSK team, presented us with a desire to move a complex data aggregation process out of a bespoke solution and into their Drupal CMS.

- They wanted it to be a part of their normal editorial workflow
- It needed to blend seamlessly with content creation
- They wanted novice users to be able to interact with the system, creating and editing the configurations
- They wanted to aggregate data across teams and individuals

Standardize Data From Teams And Individuals

GetTeamsByInfo

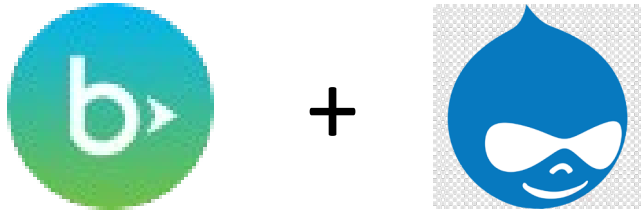
```
<?xml version="1.0" encoding="UTF-8"?>
<getTeamSearchByInfoResponse xsi:schemaLocation="http://convio.com/crm/"
  <totalNumberResults>1</totalNumberResults>
  <team>
    <name>Sample Team Name</name>
    <amountRaised>15850</amountRaised>
    <goal>50000</goal>
    <id>12345</id>
    <captainConsId>1001001</captainConsId>
    <captainFirstName>Earl</captainFirstName>
    <captainLastName>Campbell</captainLastName>
    <captainScreenname>The Tyler Rose</captainScreenname>
    <isCaptainAnon>false</isCaptainAnon>
    <companyId>1000</companyId>
    <companyName>Blackbaud</companyName>
    <numMembers>7</numMembers>
```

GetParticipants

```
<?xml version="1.0" encoding="UTF-8"?>
<getParticipantsResponse xsi:schemaLocation="http://convio.com/crm/"
  <totalNumberResults>3</totalNumberResults>
  <participant>
    <name>
      <first>Participant</first>
      <last>Sample01</last>
    </name>
    <aTeamCaptain>false</aTeamCaptain>
    <teamName>
    <donationUrl>http://example.com/donateurl</donationUrl>
    <personalPageUrl>http://example.com/personalpageurl</personalPageUrl>
    <teamPageUrl>
    <consId>1001000</consId>
    <personalPagePrivate>false</personalPagePrivate>
    <amountRaised>5180</amountRaised>
    <goal>105060</goal>
    <eventName>Event 1000</eventName>
    <eventId>1000</eventId>
```

Applying Lessons Learned

From our experience working with MSK and their Luminate Instance we knew a few things when we got started.

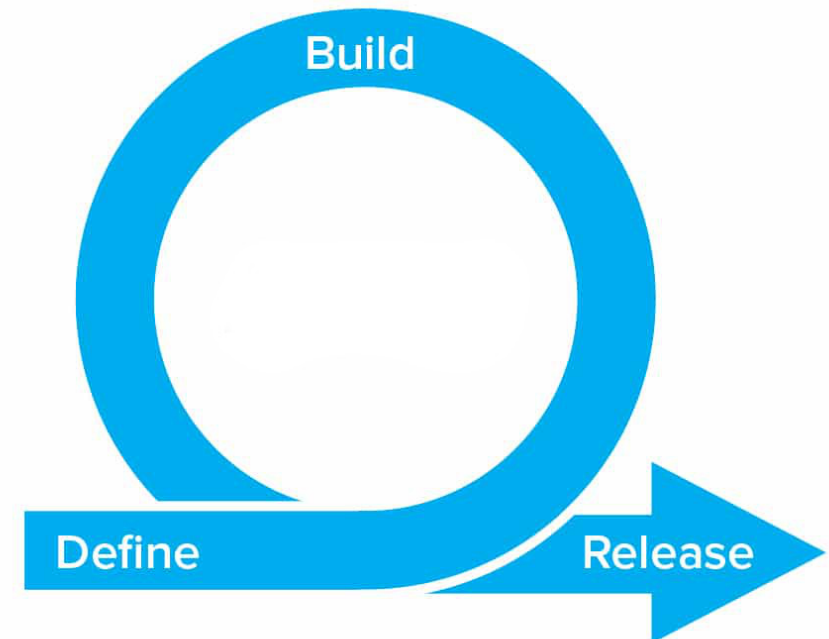


- We did not want to store extensive data in the Drupal CMS
- We wanted to rely as much as possible on the live and fluid data inside of Luminate, both on the frontend and admin side.
- The Luminate API's for Teams and Individuals shared many elements, but still had distinct components

Accomplished the Goal Through an Iterative Process

We worked through an iterative process

- We broke the project down into small, digestible chunks, like admin and front-end concerns in different tickets
- We worked on those targeted features and moved on when they were fully QA'd and done
- The teams discussed the work frequently, we ensured the work was moving towards the expected result



Achievement Unlocked

Together we built a system that met, and exceeded the requirements. It includes features like:

- Custom components for selecting Teams and Individuals that blend seamlessly with their editorial process
- Efficient and timely aggregation of data
- Attractive display of data on their website, in a component driven system, giving them control over final presentation

The screenshot displays a 'TEAM ROSTER' interface with the following elements:

- TEAM ROSTER** (Section Header)
- Team Page** (Expandable) with a **Remove** button. Content: **"Shannon's Team" & Friends (Kids Walk for MSK Kids)**
- Individual Page** (Expandable) with a **Remove** button. Content: **Emilia Martínez (Kids Walk Create Your Own Fundraiser)**
- Team Page** (Expandable) with a **Remove** button. Content: **"Shannon's Team" & Friends (Kids Walk for MSK Kids)**
- Individual Page** (Expandable) with a **Remove** button. Content: **Shannon Buscemi (from team Porch Project Nesconset at Kids Walk Create Your Own Fundraiser)**

At the bottom, there is a search bar with a dropdown menu set to **KW_Live**, a text input field containing **shannon**, and a **Last Name** label. Below the search bar is a button labeled **Add individual page** with a dropdown arrow and the text **to Team Roster**.



#bbdevdays

Thank you!