

Background

Our client is one of the biggest Ukrainian political parties, which has a multi-level hierarchical organizational structure comprising more than **380 branches** in all regions of the country. The party has dozens of active projects and tracks the records of more than **50K constituents** and members. The party engages in active public and parliamentary activity and hosts **hundreds of events monthly**.

Till recent time all the information and plans of the party were shared using Google Docs/Sheets. Since the party continued to expand, it perceived the need in a powerful software platform to automate internal processes, facilitate communication with supporters and constituents, and effectively manage all the information collected and generated by the organization each day.

Project Requirements

The client requested to implement a software platform, which would systemize and automate their internal processes. In particular, the solution had to:

- Reduce large amount of paperwork and human factor errors
- Establish a single database to store all organization data on the members, events, activities, budget, inventory, KPIs, etc.
- Assure role- and geo-based data access
- Provide an easy and fast way to find any necessary information
- Accelerate the process of case management
- Create an inventory storage
- Automate budgeting and KPI management processes
- Provide convenient and fast mean of internal communication and information/news sharing

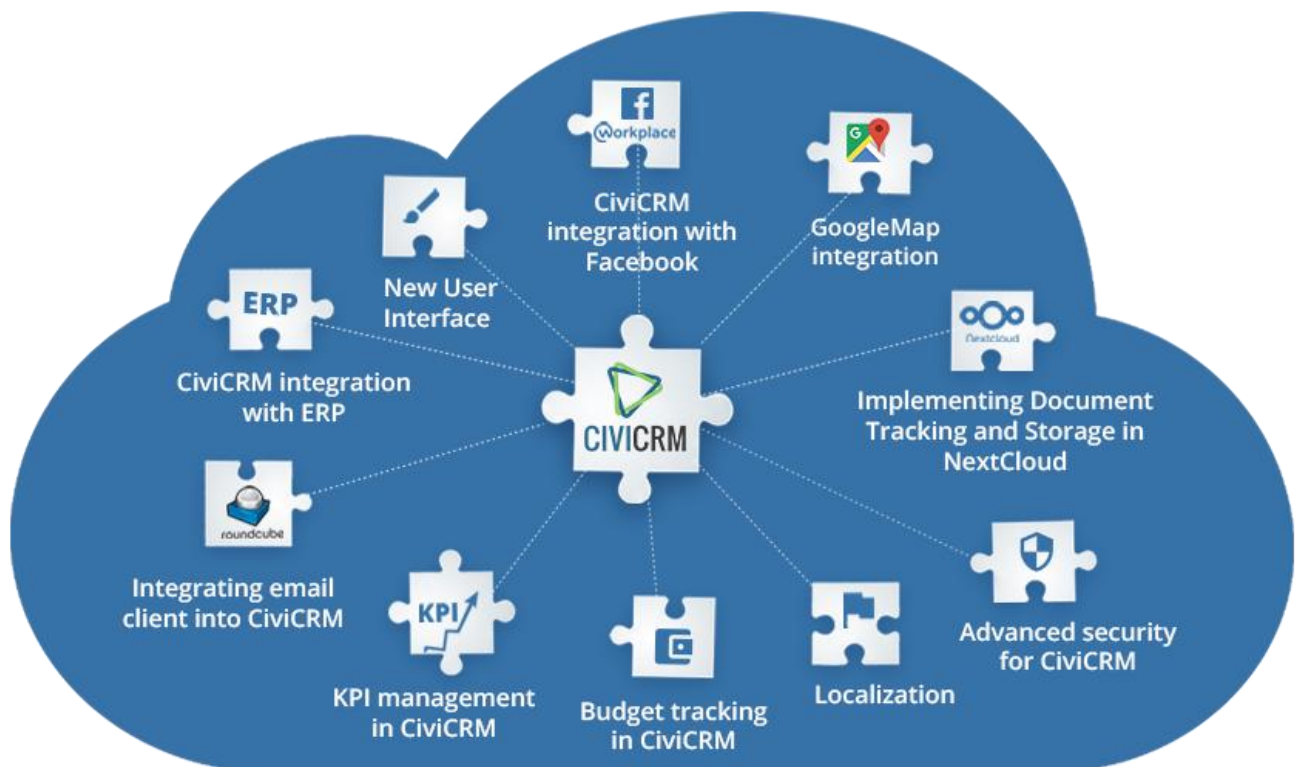
At the same time, the platform had to have **a user-friendly** and **intuitive interface** which would be easy for use even for users with min computer skills.



Suggested Solution

After analyzing all the client's needs and project requirements, CiviCRM was selected as the most appropriate platform, which provides a lot of functionality meeting major needs of our client. **Agiliway** further extended CiviCRM with additional custom modules and features which implement specific client logic such as:

- New user interface
- Full localization
- Multi-level security
- Email integration
- Workplace by Facebook integration
- KPI module
- Inventory and budgeting
- And set of components – graphical Calendar, Document module, group event registration



The integrated solution consisted of:

1. Setting up basic CiviCRM functionality
2. Full Ukrainian **localization** of CiviCRM

12 796 lines
translated into Ukrainian



common-base_1_3.po • CiviCRM - Poedit

File Edit View Catalog Go Help

Open Save Validate Statistics Update Fuzzy

Source text — English	Translation — Ukrainian	ID
The destination group extends a different entity type.	Група призначення поширюється на інший тип об'єкта.	1
%1 must in proper money format. (decimal point/comma/space is allowed).	%1 повинні бути в належному грошовому форматі. (десятикова крапка / кома / пробіл дозволені).	2
%1 must be valid Website.	%1 повинен бути дійсним веб-сайтом.	3
Cannot create custom table because %1 is already a core table.	Неможливо створити персоналізовану таблицю, тому що %1 вже є основною таблицею.	4
%1 Questions	%1 питань	5
Are you sure you want to delete attached file.	Ви впевнені, що хочете видалити прикріплений файл?	6
Delete Attached File	Видалити прикріплений файл	7
The custom field %1 is corrupt. Please delete and re-build the field	Персоналізоване поле %1 містить помилку. Будь ласка, видаліть його та створіть нове поле.	8
entityID needs to be set and of type Integer	числове ID має бути визначене та бути цілим числом	9
field ID needs to be of type Integer for index %1	ID поля має бути цілим числом для індексу %1	10
value: %1 is not of the right field data type: %2	значення: %1 є неправильним типом даних для поля: %2	11
Unknown error	Невідома помилка	12
Invalid entity type	Неправильний тип суб'єкта.	13
There is no valid default from email address configured for the domain. You can configure here Configure Fro...	Не існує дійсних налаштувань за замовчуванням серед електронних адрес, сконфігурованих для домену. Ви можете нал...	14
Mime Type is now a required parameter	Тип MIME тепер є обов'язковим параметром	15
Delete All Attachment(s)	Видалити усі вкладення	16
Attach File	Прикріпити файл	17
File size should be less than %1 MByte(s)	Розмір файлу має бути меншим за %1 мегабайт (и)	18
Portrait	Портрет	19

Source text:

The destination group extends a different entity type.

Translation:

Група призначення поширюється на інший тип об'єкта.

Translated: 719 of 719 (100 %)

3. **Simple and appealing User interface design** with a quick access to all personal data and activities including personal calendar, documents, contributions, etc.

Search

John Smith

CRM

ContactsEventsMailingsCampaignsCasesReportsAdministerKPIBudgetInventoryDocuments

John Smith

Position

Head of department

Organization

Association of Community Organizations for Reform Now

Position

Member of the public organization

Organization

Central Bureau of Statistics

Event Calendar

Memberships

Registrations on events1

Activities7

Cases7

Profile

Relationships

Groups

Notes

Tags

Change Log

Documents

Edit

Delete Contact

Publicly Information

First Name

John

Last Name

Smith

Gender

Male

Email

John_Smith@gmail.com

Phone

+38 (096) 5674356

Facebook Website

http://facebook/id456745

Personal Information

Date of Birth

01.05.1980

ID

2147483647

Passport No

KB 12345

Issued On

08.07.08

Expires On

08.07.18

Address

Main Address

State

City

Arizona

Post Address

Bedrock

Postal Code

Rocky Way 402

Country

746g36

United States

Additional address

State

City

Arizona

Post Address

Bedrock

Postal Code

Rocky Way 402

Country

746g36

United States

Work place

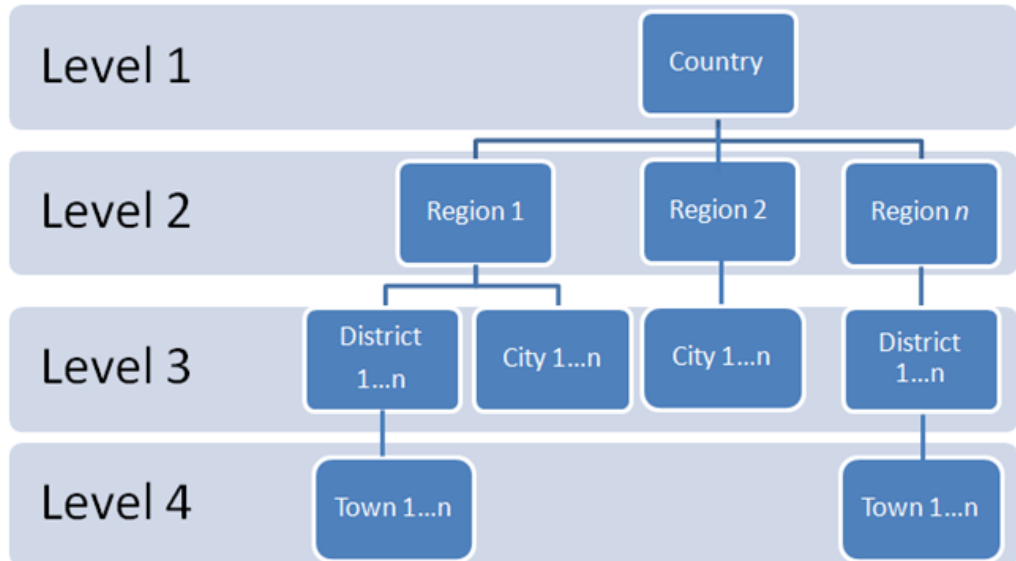
Another Data

4. Graphical Calendar extension and dashlet with several beneficial features such as:

- The ability to view cases, events and activities for a specific period of time
- Quick access to activities' details
- The ability to create new cases, activities or events directly from the calendar
- Filters for better visibility

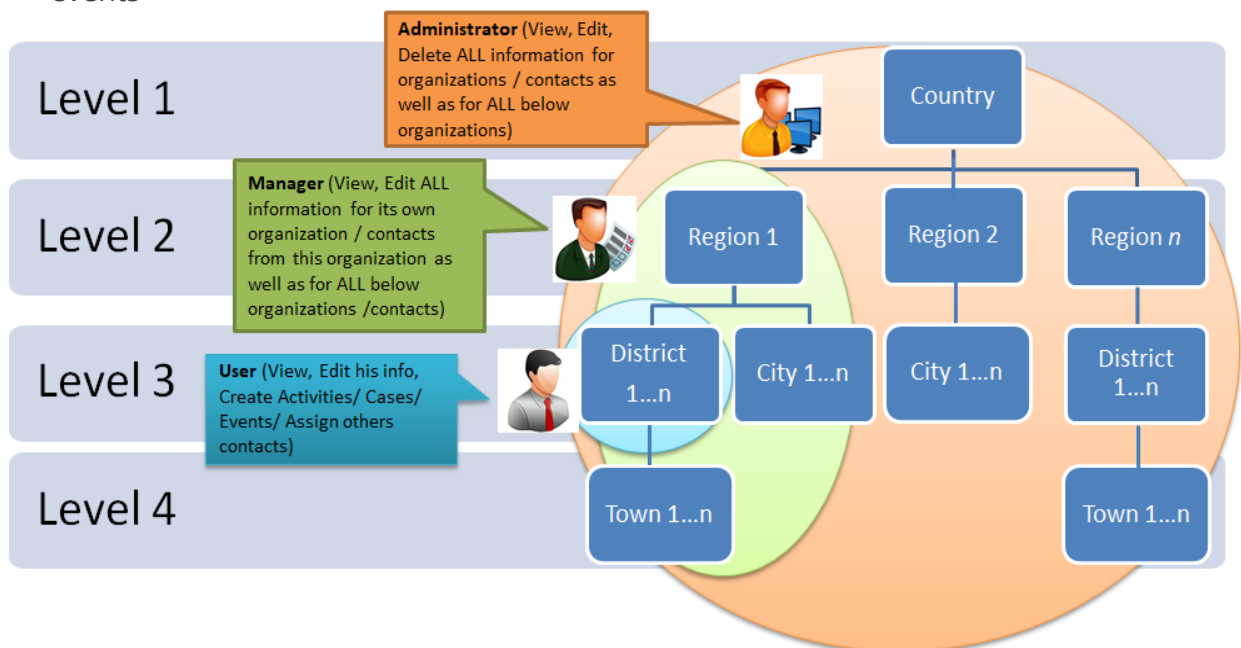
The screenshot displays the CivCRM web application interface. At the top, there is a navigation bar with a search field and various icons. Below this is a header with the CRM logo and a list of menu items: Contacts, Events, Mailings, Campaigns, Cases, Reports, Administer, KPI, Budget, Inventory, and Documents. The main content area features a user profile for John Smith, including his position (Head of department), organization (Association of Community Organizations for Reform Now), and another role (Member of the public organization, Central Bureau of Statistics). To the left is a sidebar with a list of features: Event Calendar, Memberships, Registrations on events, Activities, Cases, Profile, Relationships, Groups, Notes, Tags, Change Log, and Documents. The central part of the interface shows the 'Edit Search Criteria' section for the 'February 2018' calendar. It includes a table with days of the week and dates, with specific events like 'Budgeting', 'MeetUp', 'Marketing Conf.', 'Ecological Conf.', and 'Finance' highlighted. A detailed view of the 'Finance Session' is shown, including the date and time (Wednesday, May 24 th, 8:00 am - 11:00 am), location (Chicago, Avenue 52), and a list of participants. The interface also includes a 'Tomorrow' section with upcoming events like 'Management Design Room' and 'Talking session'.

5. **Security Module** implements orgstructure-based access control for multi-level organization :



Our custom **Security Module** implements access control which:

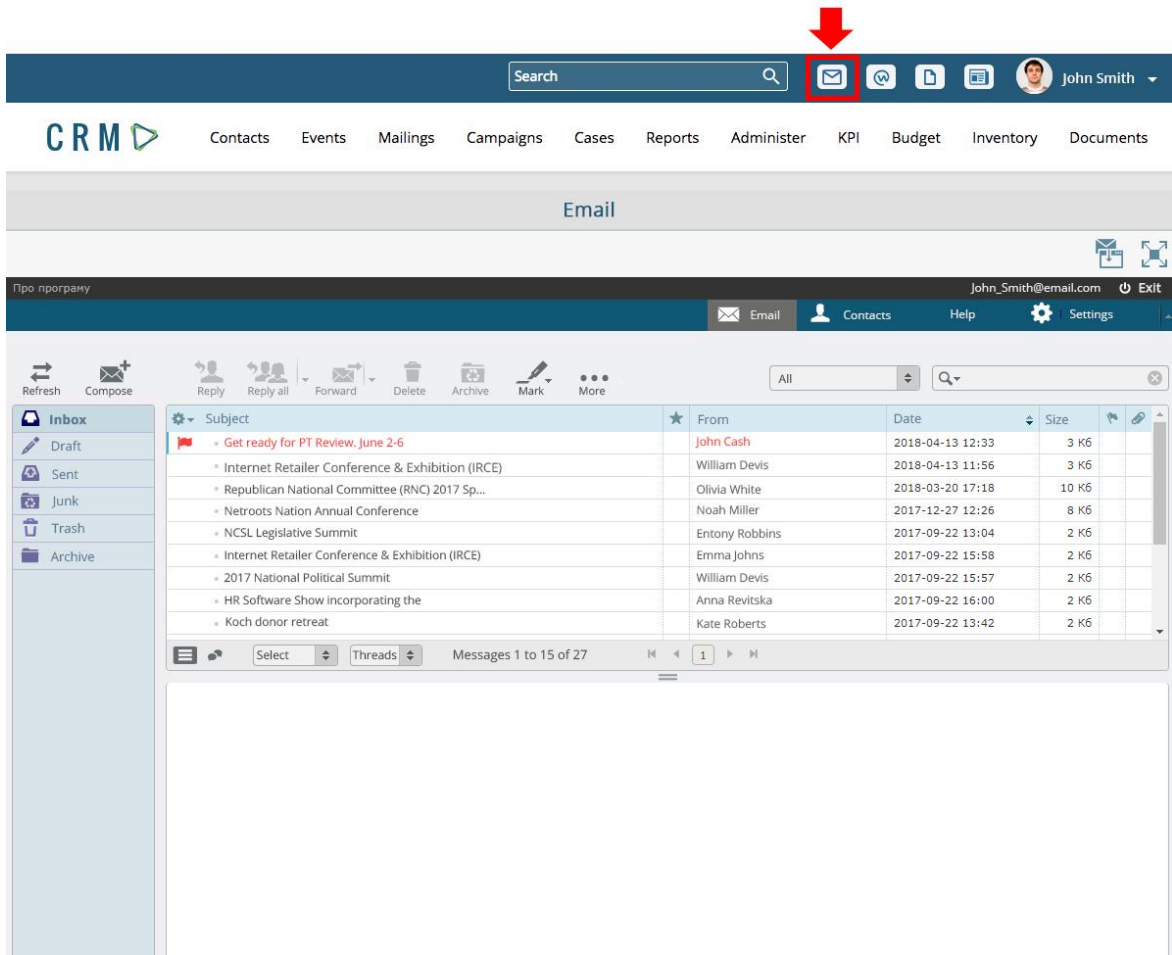
- **Defines relationship** between organizations (parent-child) via Civi Relationships
- Provides access to the information of:
 - Organization the user belongs to (e.g. for a branch member), or
 - Organization the user belongs to and **all subordinate organizations** (e.g. for a regional manager)
- Applies access rules to **all components** including contacts, cases, activities, events



6. Email Client integration (Round Cube) into CiviCRM.

To reduce administration time, an email account is created for every new CiviCRM user automatically.

The system also provides **Single sign-on (SSO)** into CRM, Mail (Round cube), Document storage (Next cloud) and Facebook



7. Workplace by Facebook integration was implemented in order to provide an easy and familiar communication channel within the solution for work chat, team groups, project updates, instant messages or alerts.

8. **KPI module** for CiviCRM with elaborate client-specific KPI procedure, the ability to retain KPIs history and calculate aggregate KPIs for different levels of the organization.

The modules allows:

- Defining performance metrics, target values (poor, fair, good, excellent, etc.) for each metric, and metric weight in the total score
- Automatically calculating KPIs using data available in CiviCRM as well as some additional info
- Generating aggregated KPIs for different organization levels and entire organization

CRM

Search

Contacts Events Mailings Campaigns Cases Reports Administer KPI Budget Inventory Documents

John Smith

KPI Questionnaire

Record Name * KPI for September 2017

Organization * Parti Liberal du Quebec

Interviewee * John Smith

Document link *

Reported period * 01-02-2018

Office Team Social activities **Budget** Media Parliamentary activities

Payment of mandatory membership fees per month: ☐ 80-100% ☐ 50-80% ☐ Less than 50%

Paying voluntary membership fees per month on account of the Party: ☐ More than 50,000 ☐ More than 20,000 ☐ More than 5000 ☐ Less than 5000

Number of funding sources: ☐ Over 5 ☐ From 3 to 5 ☐ Less than 3

Save Save and submit

9. **CiviCRM and ERP integration** so that the data in the two systems is synchronized on regular base. This solution allows managing:
- **Inventory:** CiviCRM receives the information about the inventory of each branch. Movement or utilization of inventory is done on request (implemented as CiviCases).
 - **Budgeting:** the module allows allocating budgets to the branches, consolidation of budgets for regions and the entire organization, management of budget allocation rules, tracking of the progress of budget expenditures, saving the history of previous periods, and analysis of budget and expenditures by multiple parameters
 - **Contributions:** the information about the new members, due payments, received payments, and membership balance are synchronized daily and can be easily accessed from the personal profile
 - **Contract Payments:** the module allows to initiate a contract agreement with a subcontractor and track the status of its approval, as well as access the history of all subcontractor agreements
 - **Expenses:** the module allows to access operational costs data and consolidate expenses according to particular cost items



10. Branch inventory page view

CRM

[Contacts](#)
[Events](#)
[Mailings](#)
[Campaigns](#)
[Cases](#)
[Reports](#)
[Administer](#)
[KPI](#)
[Budget](#)
[Inventory](#)
[Documents](#)

Association of Community Organizations for Reform Now

Position

Head of department

Organization

Association of Community Organizations for Reform Now

Position

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Event Calendar

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Registrations on events

Activities

Cases

Profile

Relationships

Groups

Notes

Tags

Budget

Inventory

Change Log

Documents

KPI

Create act transfer inventory

Transfer act search

Show 25 Items

<<

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1

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Type	Product name	Measurement unit	Asset identification	Asset sum	Asset count
Non-current tangible assets of low cost	Notebooks	Item		90	30
Non-current tangible assets of low cost	Paper	Item		390	5
Non-current tangible assets of low cost	Pencils	Item		50	5
Non-current tangible assets of low cost	Pens	Item		100	25
Low Value Assets	Folders	Item		390	15
Low Value Assets	Cartridge	Item		100	2
Non-current tangible assets of low cost	Glue	Item		90	5
Commodities and materials	Table	Item	13940, 21333, 20873	400	2
Commodities and materials	Chairs	Item	23900, 21833, 21873, 23300, 20833, 20873	900	6
Commodities and materials	Tents	Item	20033	950	1
Low Value Assets	Flags	Item		200	2
Capital assets	PC	Item	13900, 22333, 21113, 23300, 20833, 20873	32002	6

Showing 1 to 12 of 12 entries

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1

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11. Branch budget allocation page

CRM

[Contacts](#)
[Events](#)
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[Campaigns](#)
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[Reports](#)
[Administer](#)
[KPI](#)
[Budget](#)
[Inventory](#)
[Documents](#)

Association of Community Organizations for Reform Now

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Position

Head of department

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Inventory

Change Log

Documents

KPI

New transfer

Period

I quarter 2018

Balance of unused funds from the previous quarter, USD

363

The amount of budget accrued in the current quarter, USD

1470000

Quarterly KPI

73

Distributed budget amount according to KPI, %

70

Budget totals, taking into account KPI, USD

1029000

Total amount for planning, USD

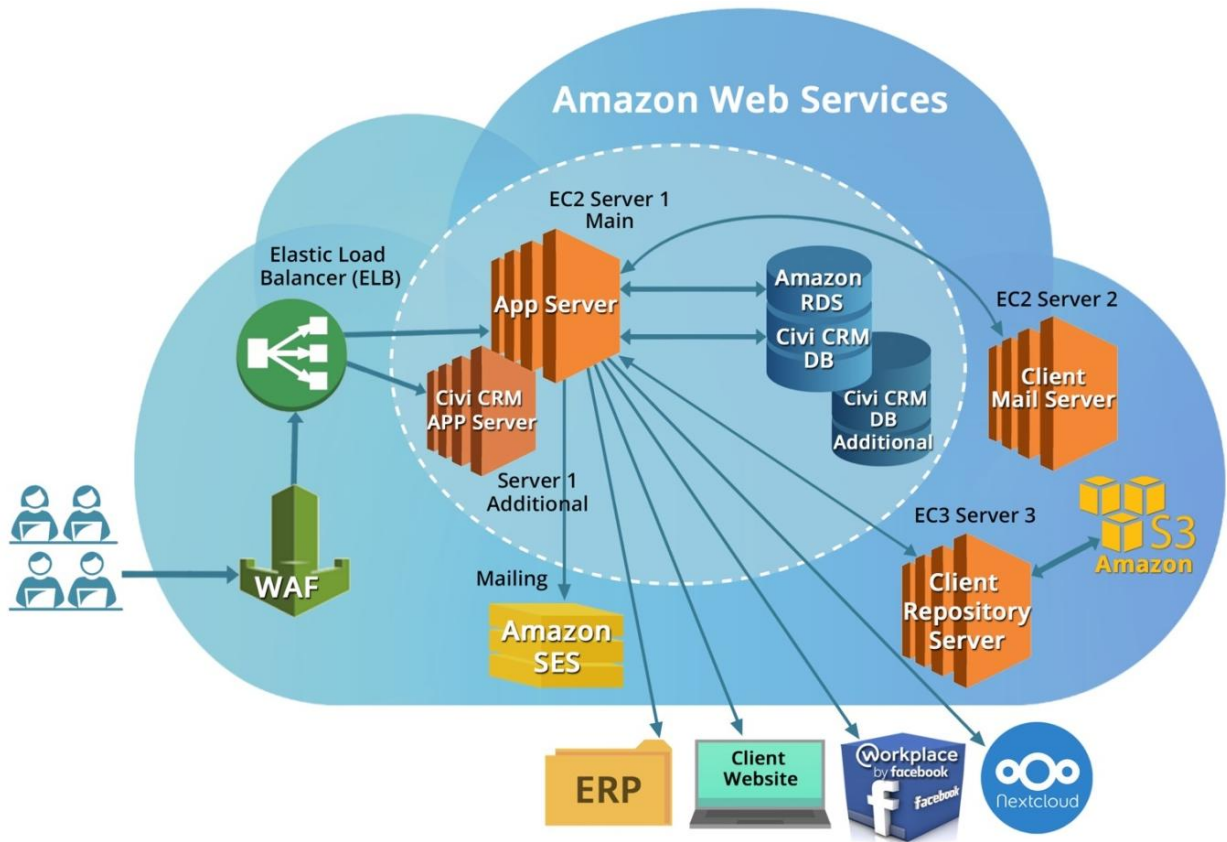
1029363

	Budget submitted to the amount of, USD	Income, USD	Written - off, USD	Balance of Payments (BOP), USD
Allocated funds	1029363			1910034
Current expenses	129373			974638
Compensation fund for employees (excluding employees responsible for the media area): wages and taxes		867465		876465
Rent of premises	75465			75465
Utilities		4465	4465	0
Stationery				0
Services (telephone and mobile communication, Internet, etc.)				0
Business trips, transport expenses (for employees)	46443		17300	29143
Expenses for development	899990			935396
Labor compensation fund for employees responsible for media: wages and taxes	867465	6933	0	874398
Conduct the representation of the Party		98223		22758
• TV channels		4465	0	4465
• Radio	0	7465	7465	0
• Printed media	7465			7465
• Outdoor advertising		9065	0	9065
Printing (printing brochures, flyers, posters, etc.)	4465	7000	11465	0
Rent of conference halls		7065	7065	0
Payment for services (social studies, information services, consulting)	4465	3775	8000	240

Save

Save and send

Approve



As part of the project **Agiliway** configure and deploy the solution at **AWS** hosting. The environment specifics include:

1. Hosting of the solution at the Amazon servers
2. Application server (Civi+Drupal) and the database are located on different servers due to performance reasons
3. Multi-AZ RDS is used to maintain DB replica in different regions and assure high availability and failover
4. Load Balancer is configured to automatically create a clone of MAIN SERVER 1 when load grows to assure server stability
5. SES service is used for mass mailing
6. Separate servers are configured for the corporate email and document storage (implemented as NextCloud solution for CiviCRM)

Value Delivered

The CiviCRM based solution developed by **Agiliway** helped the client to systemize and automate their core processes while enhancing security and collaboration. Due to custom modules and features integrated into basic CiviCRM platform, the client has received a **single** and **reliable solution** for organization members to perform their daily duties.

