

## CASE STUDY

# American Association for the Advancement of Science (AAAS) Fellowships Program

Connecting Fellows and Encouraging Networking

## Goals

Streamline data management for staff and fellows alike.

The American Association for the Advancement of Science (AAAS) Fellowships program provides year-long federal policymaking assignments to more than 100 scientists and engineers each year. Needing effective constituent management for its network over 3,400 strong, AAAS has worked with Fíonta on multiple projects to implement Salesforce and website solutions. The Fellowships Directory project included:

- Implementation of Salesforce to serve as a single repository of data and a primary working environment for staff to maintain information.

- An update to the Science & Technology Policy Fellowship Program “FellowsCentral” website from Drupal 7 to Drupal 8, while maintaining its complex Salesforce integration that provides fellows with an easy-to-use online directory and various self-service tools.



Thank you for the outstanding work you have done with our redesign.[...] We are thrilled with the progress so far and are looking forward to what you show us next.

**Melissa McCartney**

*Editorial Fellow*

*American Association for the Advancement of Science*

## Challenges

Complex functionality needs for the internal CRM and member portal.

- Meeting the unique data management and workflow needs of several functional teams within the organization.
- Recreating a member portal with complex Salesforce integration in Drupal 8, giving fellows access to robust functionality and data synced with Salesforce, including:
  - Activity history
  - Event registration
  - PTO and travel requests
  - Travel and training budget tracking
  - Task completion
  - Member directory
  - Profile updates
- Migrating SSO to Drupal 8 and allowing for certain Contacts in Salesforce to log in as Drupal users.
- Converting custom modules and components from Drupal 7 to Drupal 8.
- Converting the Drupal 7 Bootstrap theme to work with pre-purchased Drupal 8 premium theme.

## Solutions and Results

Customized solutions built on a foundation of trusted platforms.

- An in-depth discovery process to uncover requirements of each team and major customization of the Salesforce Enterprise CRM.
- Development of the Salesforce integration with FellowsCentral, Trellis, Application Portal, and support systems to establish Salesforce as the system of record.
- Customization of the sync between Salesforce and Drupal 8, built on the Salesforce Suite set of modules, to account for both feature limitations in the new platform and resolve lingering issues from the old platform.
- Implementation of SSO with the OpenID Connect module in Drupal 8 to allow users to sign on with IDP credentials.
- Installation and configuration of Drupal core, module and theme updates, including periodic code audits and optimization to discover unnecessary redundancy, bottlenecks, and security issues.
- Re-theming of the new site, using the pre-purchased premium theme, to utilize new theme functionality while maintaining existing appearance.

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