

# Integrating Third-Party Applications Made Easy with iMIS Bridges

Presented by:  
Association Technology Solutions

- Serving iMIS community since 1995
- Full-service Authorized iMIS Solutions Provider (AiSP)
- Application development to extend the functionality of iMIS
- iMIS Bridge powered by ATS with over 140 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients



# Presented by



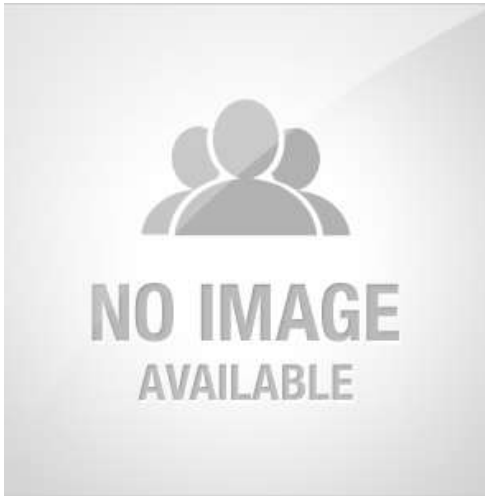
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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts  
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation is complete

## iMIS Bridge

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- ✓ ATS is a Product Partner of ASI
- ✓ iMIS Bridge is available through ASI, ATS, or your AiSP

[www.atsol.org](http://www.atsol.org) -> products -> iMIS Bridge

## What is the iMIS Bridge powered by ATS?

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- ✓ A single platform that includes modules to over 140 vendors who serve the association and non-profit community.
- ✓ Created through a partnership with ATS, ASI, third-party vendors, and customers like you.
- ✓ iMIS customers can decide which modules they wish to license and configure.
- ✓ Modules to new vendors are being regularly added.

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## Integration with dozens of popular solutions

☐ Solutions to extend the functionality of iMIS

LMS

CMS

Registration

Webinars

Advocacy

Email

Community

Career


Survey

Election

Fundraising

Certification

**iMIS** Bridge

powered by 

## Types of Modules

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- ✓ Content Management Systems
- ✓ Learning Management Systems
- ✓ Registration/Event Related Systems
- ✓ Advocacy
- ✓ Applications, Submissions, and Testing
- ✓ Certification
- ✓ Email
- ✓ Online Community
- ✓ Career/Job Boards
- ✓ Digital Publishing
- ✓ Survey/Benchmarking
- ✓ Elections
- ✓ Fundraising

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## iMIS Bridge Modules

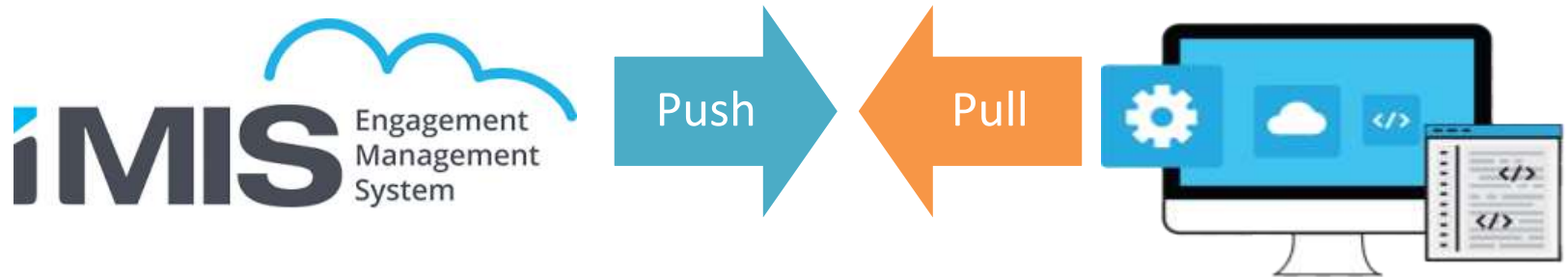
- ✓ Use iMIS Application Programming Interfaces (API)
- ✓ Use third-party API's (e.g., Zoom)
- ✓ Often developed in conjunction with vendor
- ✓ Highly flexible and configurable



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## Typical Module Functionality

- ✓ Move data from iMIS EMS to a third-party system
- ✓ Move data from a third-party system to iMIS EMS
- ✓ Single Sign On



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## Single Sign-On

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- ✓ Visitors have one username and password
- ✓ Once logged into iMIS they will not have to login again to visit a third-party site
- ✓ SSO implements technology best suited for vendor (e.g., SAML, OAuth, Token)
- ✓ iMIS Bridge SSO respects Authentication (can you login?) and Authorization (do you have permission?)



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## Why Integrate?

- ✓ Create a seamless member experience
- ✓ Eliminate manual imports and exports
- ✓ Set and forget the implementation
- ✓ Leverage iMIS EMS Engagement Scoring
  - ✓ Did they complete a course?
  - ✓ Did they vote in the election?
  - ✓ Did they contact their congressman?
  - ✓ Did they attend a webinar?



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## Best Practices

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- ✓ Multiple use cases are supported
- ✓ Very configurable
- ✓ Templated approaches to streamline implementation
  - ✓ Best practices for iMIS EMS
  - ✓ Best practices for Third Party Vendors
- ✓ Recipes for success!



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## Advantages

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- ✓ Quick to deploy
- ✓ Documentation
- ✓ As iMIS changes or third-party vendor API changes, ATS manages the code modifications and upgrades
- ✓ If additional use cases are required, they are added and made available to all clients
- ✓ New modules will be added to the platform and are available to all clients
- ✓ Error reporting for failed module operations (e.g., third party down)

BENEFITS



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## Example Use Case - Boxwood

- ✓ Users visit your RiSE website and navigate to Boxwood
- ✓ You can require login or let people browse anonymously
- ✓ When login is required, you can create an IQA of allowed Job Seekers and Employers
- ✓ If the person is not authorized, they will be redirected to a url you specify
- ✓ When they perform an action, that engagement is written back to iMIS

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# Example Use Case - Boxwood



The screenshot displays the iMIS Boxwood Dashboard. On the left is a navigation sidebar with categories like Community, Membership, Fundraising, Events, Commerce, Marketing, Certification, Finance, Careers, and Settings. The main content area is titled 'Boxwood Dashboard' and features two pie charts: 'Jobseeker Usage' and 'Employer Usage'. Both charts show three segments: AGENT (green), APPLICATION (yellow), and REGISTRATION (orange). Below the charts is a table with tabs for 'All jobseekers', 'Nonmember jobseekers', 'Employers', and 'Settings'. The table lists user activity with columns for ID, Full Name, Action Type, Description, and Date.

ID	Full Name	Action Type	Description	Date
191	Douglas Hunt	APPLICATION	Applied for job: 1183764	1/10/2019 12:00:00 AM
194	Dr. Charles S. Corwin	AGENT	Job Agent Created	8/26/2018 12:00:00 PM
162	Mr. Duane S. Bell	REGISTRATION	Registered for the site	4/22/2018 12:00:00 AM
191	Douglas Hunt	APPLICATION	Applied for a job	4/22/2018 12:00:00 PM

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## Example Use Case - Zoom

- ✓ Users visit your RiSE website and look through a catalog of webinars
- ✓ User adds one or more webinars to the cart and checks out
- ✓ At check out, registration is automatically created at Zoom
- ✓ When the webinar over, attendance and minutes watched are written back to iMIS
- ✓ Invitees who did not register through iMIS are deduplicated against iMIS and created as prospect records
- ✓ The Zoom module includes additional use cases beyond those mentioned above

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## Example Use Case - Wiley

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- ✓ User wants to view your online journal
- ✓ When accessing protected content, they are prompted to login if they are not already
- ✓ The login authenticates the person
- ✓ A client-specific filter will determine if the logged in person has authorization to view the journal
- ✓ If they are not authorized, they will be redirected to a client specific page encouraging membership.
- ✓ If they are authorized, they will be redirected to the online journal
- ✓ Wiley confirms the SSO tokens and displays the online journal

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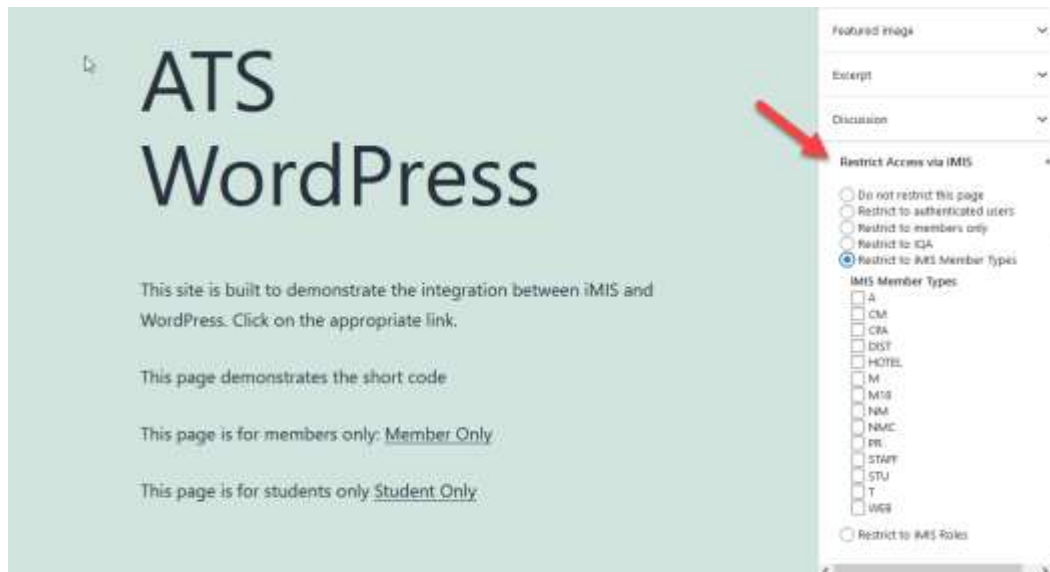


## Example Use Case - WordPress

- ✓ iMIS EMS client has a well-established WordPress microsite for a chapter or specialty application and is not yet using RiSE.
- ✓ While visiting a member-only page on the WordPress site, the user must login.
- ✓ The user is redirected to the iMIS login.
- ✓ After successful login, the user is redirected to WordPress where they will see a personalized welcome heading.
- ✓ The user can view the page.
- ✓ Pages can be individually locked down to any group of users in iMIS EMS (e.g., members, students, board, registrants, donors, chapter members, etc.)

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# Example Use Case - WordPress



The screenshot shows a WordPress page with the following content:

- ATS  
WordPress
- This site is built to demonstrate the integration between iMIS and WordPress. Click on the appropriate link.
- This page demonstrates the short code
- This page is for members only: [Member Only](#)
- This page is for students only [Student Only](#)

The sidebar menu on the right includes:

- Featured Image
- Excerpt
- Discussion
- Restrict Access via iMIS
  - Do not restrict this page
  - Restrict to authenticated users
  - Restrict to members only
  - Restrict to CJA
  - Restrict to iMIS Member Types
    - A
    - CM
    - CRA
    - DSY
    - HOTEL
    - M
    - M18
    - NM
    - NMC
    - PR
    - STAFF
    - STU
    - T
    - WSP
  - Restrict to iMIS Roles

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## Common Questions

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- ❑ What gets written back to iMIS?
  - ❑ In general, we work with each vendor to maximize what is written to iMIS.
  - ❑ Data is written back to activity records or panels.
  - ❑ The iMIS Bridge and dashboards are not meant to be a replacement for the third- party product.
- ❑ Example
  - ❑ When a person completes a course at an LMS we write back completion data, credit hour type and number of credits earned.
  - ❑ We do not write back how a student answered question 7 on the quiz at the end of chapter 5.  
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## Common Questions

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- ✓ What gets sent to the third party?
  - ✓ For ecommerce transactions in iMIS, we generally send “who bought what”.
  - ✓ In many cases, we have the ability to send additional information that is unique to the iMIS customer. This is typically done with an IQA.
- ✓ Example
  - ✓ For Constant Contact integration, adding a column to an IQA will automatically create a new custom demographic at Constant Contact and populate it so you can use it for segmentation.

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## Common Questions

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- ✓ When does data get synchronized between the two systems?
  - ✓ Where possible, this is done real time. For example, when someone adds an LMS course or webinar to their cart, an invisible iPart on your confirmation page will synch the data to the third-party vendor.
  - ✓ A “catch up” process generally runs during off hours and synchs the data between servers.
  - ✓ When iMIS implements web hooks we plan to apply that technology as well.
- ✓ Example
  - ✓ When a person purchases a Zoom Webinar, they are immediately registered at Zoom

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## Common Questions

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- ✓ What are the Single Sign-on options?

**“The good thing about standards is that there are so many to choose from.”** - Andrew S. Tanenbaum

- ✓ When the third-party application requires Single Sign-on we work with the vendor to implement their preferred solution.
- ✓ SAML2.0 is the most common. iMIS must be the Identify Provider at this time.
- ✓ Some vendors support cookie, token, OpenID, oAuth, or some custom algorithm.
- ✓ All solutions currently result in iMIS being the source of truth and the place people login.

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## Common Questions

- ✓ How do we manage ecommerce when money is collected at the third-party vendor?
  - ✓ When the third-party vendor collects money, they become the “source of truth” for that transaction including adjustments and refunds.
  - ✓ The third-party vendor becomes an additional subsidiary accounts receivable ledger to your general ledger.
  - ✓ We do not “fake” transactions in iMIS.



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## Summary

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- ✓ The iMIS Bridge provides a turn-key solution to integrating iMIS Enterprise with third-party applications.
- ✓ Supported use cases are mature and well-documented.
- ✓ Support is provided through online documentation and an online help desk, monitored by a dispatcher.
- ✓ Installation and configuration is supported by trained staff familiar with iMIS EMS and the third-party application.
- ✓ New modules and use cases are supported as requested. When one client asks for an enhancement, it is made available to all clients.

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## Additional Information about iMIS Bridge

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- ✓ Modules have pages that discuss how they work
- ✓ Some have videos and webinars describing the use
- ✓ Supported use cases are listed on the website
- ✓ Contact us for additional use cases or questions
  
- ✓ <https://www.atsol.org/imisbridge>
- ✓ [sales@atsol.org](mailto:sales@atsol.org)

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# Questions & Answers



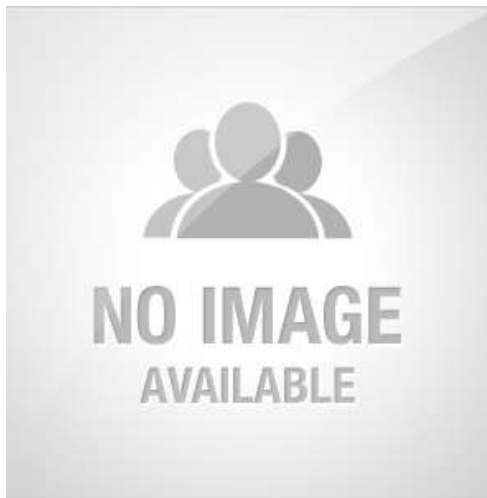
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