



# WEBINAR SERIES

## Navigating Custom & Third-Party Integrations in Your Transition to iMIS EMS

Presented by:

Randy Richter

Association Technology Solutions





# About ATS

- 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 150 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients





# Presented by



*Presenter:*

Randy Richter

Director of Technology, Partner  
Association Technology Solutions, LLC

Email: [rrichter@atsol.org](mailto:rrichter@atsol.org)



*Moderator:*

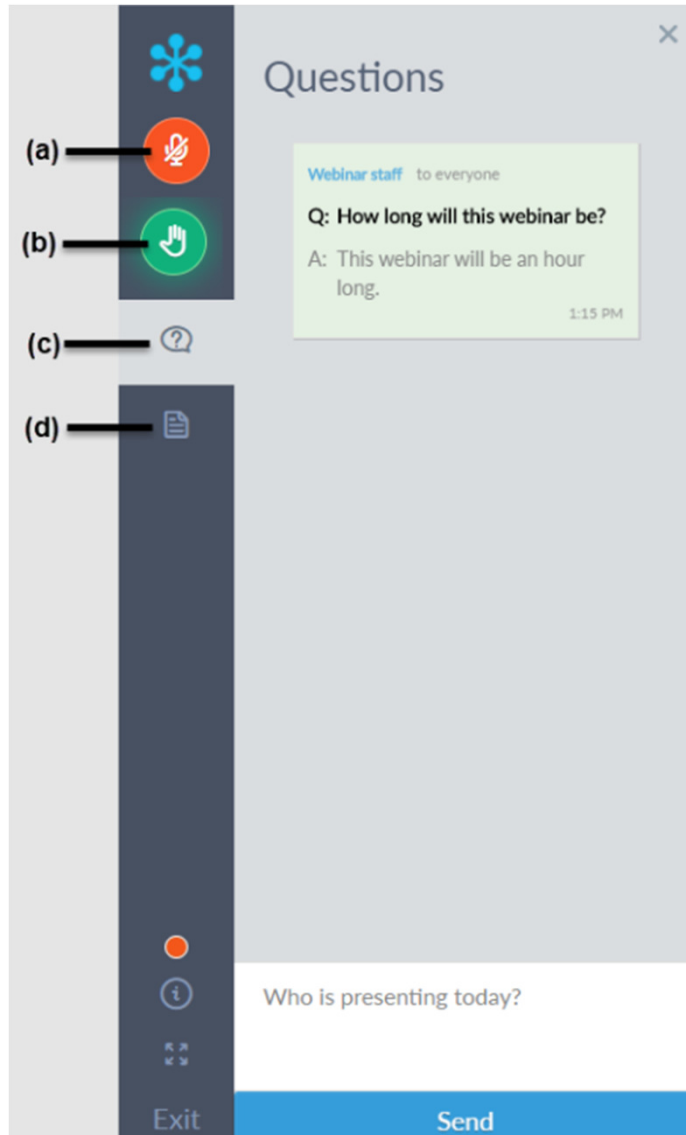
Richard Banks

Sales Manager

Association Technology Solutions, LLC

Email: [rbanks@atsol.org](mailto:rbanks@atsol.org)





- 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



# WEBINAR SERIES

## Navigating Custom & Third-Party Integrations in Your Transition to iMIS EMS

Presented by:

Randy Richter

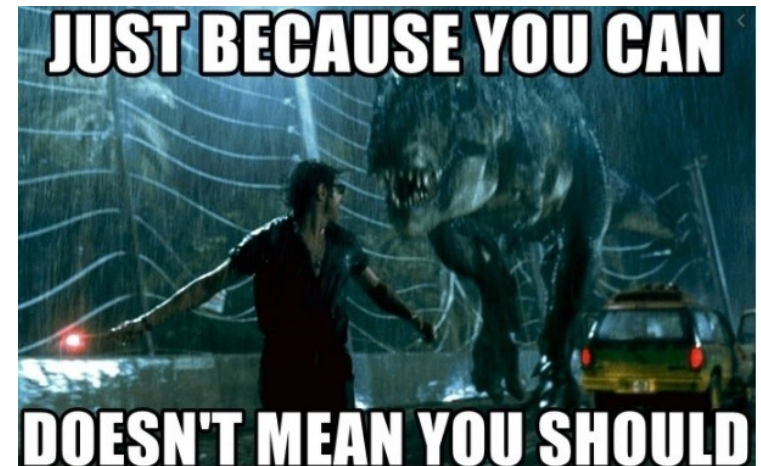
Association Technology Solutions



## How did we get here?

---

- ✓ iMIS has traditionally been very extensible
- ✓ iMIS has traditionally been a very open system
- ✓ Not all customizations or extensions were done using the iMIS tools





## What kind of things have we done?

---

- ✓ Integrate with third party systems (e.g., LMS)
- ✓ Move data (e.g., move data to other tables)
- ✓ Fix data (e.g., lowercase email addresses)





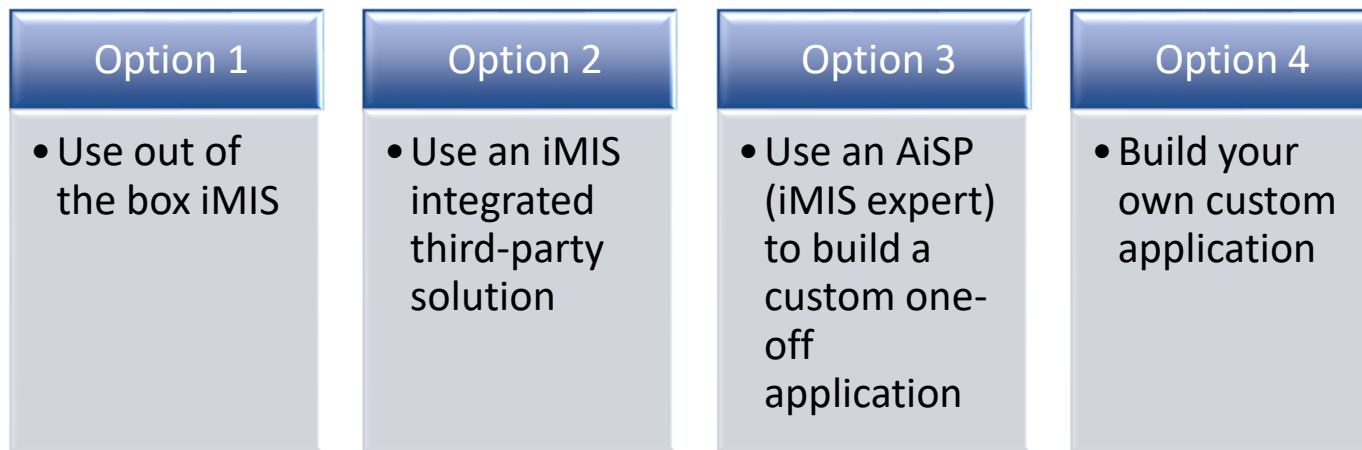
## Our vision

---

- ✓ Anything you can do in iMIS 2017 can be achieved with iMIS EMS Cloud.
- ✓ We do not recommend self-hosting or iMIS 2020 to our clients. We recommend going directly to EMS Cloud.
- ✓ We have well over half of all ATS clients transitioned to EMS cloud.
- ✓ We support nearly 150 clients who are in EMS and using iMIS Bridge for one or more of their integrations.

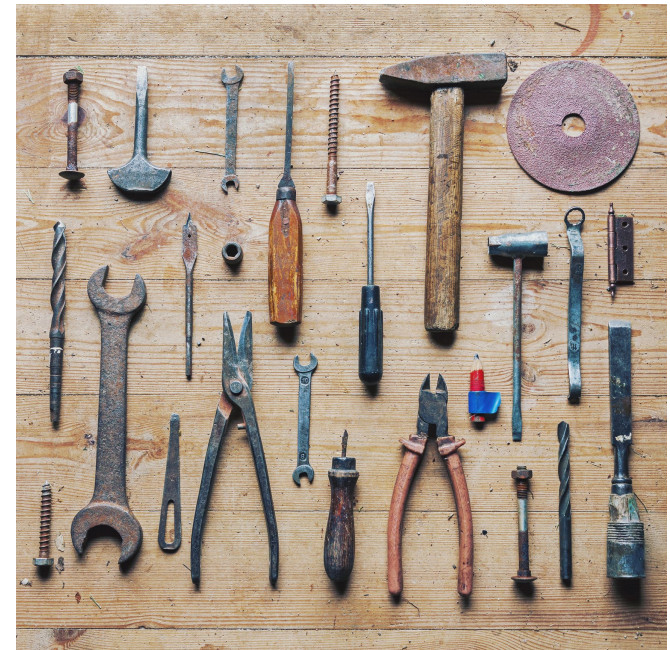


## Our vision



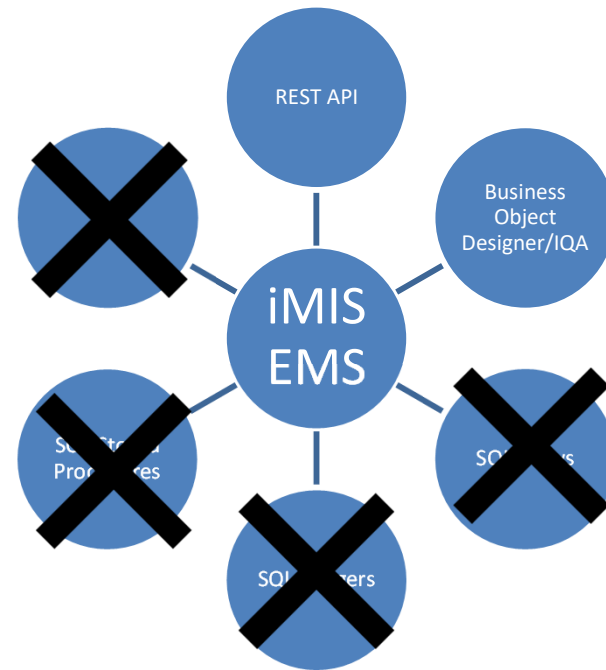
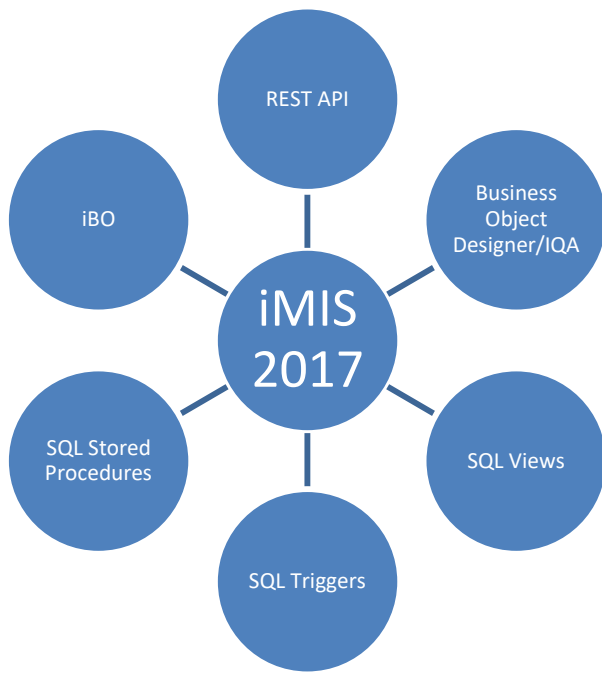
## What tools have we used with iMIS 2017?

- ✓ iMIS API's (.com ibo's, .net ibos, REST API)
- ✓ SQL Views
- ✓ SQL Stored Procedures
- ✓ SQL Triggers



# What does the transition to EMS mean for a toolset?

- Some tools are no longer available but new tools are





## What are the considerations?

---

- ✓ Is the customization or third-party integration still relevant?
- ✓ Is the customization or third-party integration no longer needed as EMS can now do that out of the box?
- ✓ Can the customization or third-party integration be replaced in 2017 before the upgrade resulting in one less thing to worry about during the upgrade?
- ✓ Don't continue the customization just because "we have always done it that way".
- ✓ Focus on the what/why first and the how later.





## Techniques - How do you get data out of iMIS EMS?

---

- ✓ In iMIS 2017
  - ✓ Create an ODBC connection to iMIS and use SQL
    - ✓ `SELECT FIRST_NAME, LAST_NAME, EMAIL FROM NAME WHERE ID = '101'`
  - ✓ IBO
  - ✓ REST API
- ✓ In iMIS EMS
  - ✓ REST API to call an IQA
  - ✓ REST API to make a REST API call





## Techniques - How do you get data into iMIS EMS?

---

- ✓ In iMIS 2017
  - ✓ Create an ODBC connection to iMIS and use SQL
    - ✓ UPDATE NAME SET EMAIL = 'TEST@MAILINATOR.COM'  
WHERE ID = '101'
  - ✓ IBO
  - ✓ REST API
- ✓ In iMIS EMS
  - ✓ REST API to make a REST API call
  - ✓ Import tools (e.g., Workbook converter, IDMS)
  - ✓ Third part products (e.g., ATS iMIS Bridge, Zapier)





## Techniques - How do you address SSO?

---

- ✓ In iMIS 2017
  - ✓ Middleware or pass through pages that send the person to the third-party
- ✓ In iMIS EMS
  - ✓ Internal Oauth or OIDC
  - ✓ Hosted SAML2.0 OIDC, or token-based solutions





## How do you prepare for the transition?

---

- ✓ Identify customizations by running the SQL scripts to identify customizations.
- ✓ Identify which customizations you really need!
- ✓ Identify all third-party integrations.
- ✓ Move any non-iMIS tables into iMIS customizer tables (these will be converted to panels during the upgrade)
- ✓ Replace SQL views (where you can with Business Objects and IQA's)
- ✓ Implement the iMIS REST API where you can





## Use Case – Non-iMIS website needs data from iMIS

---

- ✓ In 2017, a third-party uses SQL to run a query to get data for an events calendar
- ✓ That data is displayed on a website
  
- ✓ In EMS use a third-party application like iMIS Bridge. This will be hosted externally and will work with both iMIS 2017 and iMIS EMS. This will allow the third-party to get the data from an IQA
- ✓ The third-party can write their own rest code to authenticate, get a token, exchange that token, call an IQA using the REST api





## Use Case – FTP file nightly to a third party

---

- ✓ In 2017, a file needs to be generated and sent to an FTP site on a nightly basis (e.g., orders for fulfillment)
- ✓ Implement a custom app that will pull the data from an IQA and push it (preferably to an API at the third party). If they don't have an API then externally push that data to their FTP site.





## Use Case – Single Sign on to Boxwood

---

- ✓ In 2017 there is an existing single sign on to Boxwood
- ✓ It uses some c#/javascript code to get the data from iMIS, confirm the person is authorized to login, build a redirect url, and redirect to Boxwood
- ✓ In EMS use a third-party application like iMIS Bridge. This will be hosted externally and will work with both iMIS 2017 and iMIS EMS.





## Consider pre-built solutions

---

- ✓ IDMS
- ✓ Zapier
- ✓ iMIS Bridge
- ✓ ATS Webservices (work with iMIS 2017 and iMIS EMS)
  - ✓ Upsert contacts
  - ✓ Get/update/delete panels
  - ✓ Upsert activities
  - ✓ Upsert relationships
  - ✓ Get IQA data
  - ✓ Upsert subscriptions
  - ✓ Create orders
- ✓ More...







## Summary

---

- ✓ Don't dig the hole deeper!
- ✓ Identify customizations that you are doing today
- ✓ Determine which of those need to be continued
- ✓ Consider migrating them to an EMS-Friendly solution before the upgrade
- ✓ Strive to use out of the box solutions first
- ✓ You will not be limited by EMS in what you can do

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





## Additional Information about iMIS Bridge

---

- ✓ 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)

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





# Questions & Answers



*Presenter:*

Randy Richter

Director of Technology, Partner  
Association Technology Solutions, LLC  
Email: [rrichter@atsol.org](mailto:rrichter@atsol.org)



*Moderator:*

Richard Banks

Sales Manager

Association Technology Solutions, LLC  
Email: [rbanks@atsol.org](mailto:rbanks@atsol.org)

