



## WEBINAR SERIES

# Why Choose the ATS iMIS Bridge Platform? A Smarter Approach to Integration

Presented by:  
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 165 integrations
- Over 100 RiSE website implementations
- iMIS EMS upgrade specialists supporting dozens of iMIS EMS clients





# Presented by



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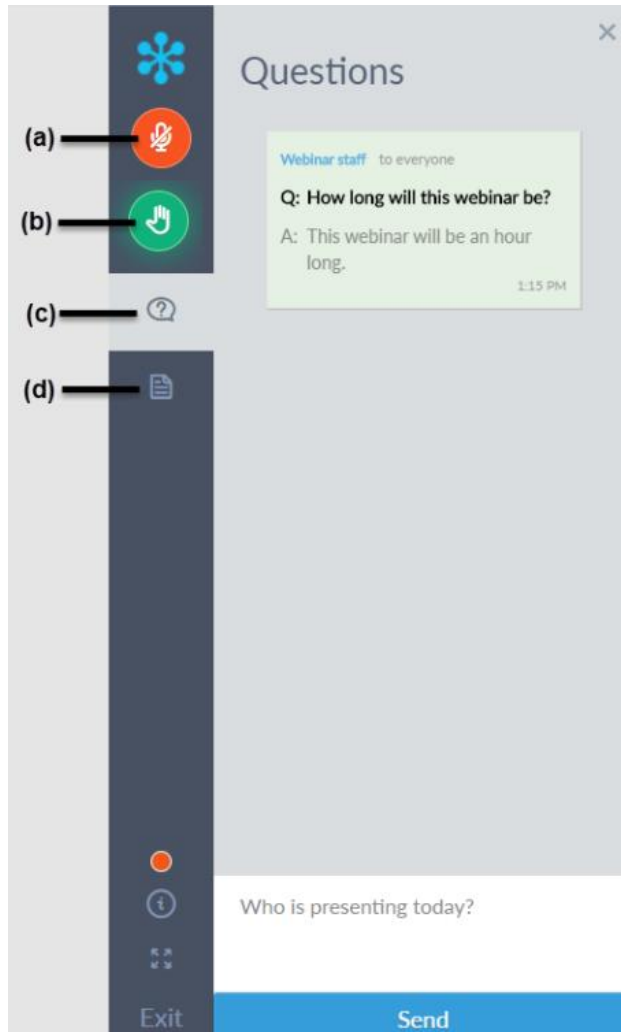
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- a) Attendees are muted to reduce background noise
- b) Raise your hand to get the attention of the presenter/moderator
- c) Download handouts  
(not typically provided for ATS webinars)
- d) Ask questions to be answered during Q&A after presentation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



## WEBINAR SERIES

# Why Choose the ATS iMIS Bridge Platform? A Smarter Approach to Integration

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## What is the iMIS Bridge powered by ATS?

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- ✓ A single platform that includes modules to over 165 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.

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

## Integration with dozens of popular solutions

◀ Solutions to extend the functionality of iMIS



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iMIS Experts Since 1995

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## The iMIS Bridge Powered by ATS Integration Platform

The iMIS Bridge is an integration platform that supports Single Sign On (SSO) and bi-directional integration for data exchange.

Developed and supported by award-winning iMIS Authorized Solution Provider ATS, the bridges support iMIS 300 & EMS and

[www.atsol.org/wcm/Products/CE\\_View...\\_Input\\_Module/wcm/Products/CE\\_View...\\_Input\\_Model.aspx?hkey=0c937413-74c0-4b05-a7de-b2b63e57effc](http://www.atsol.org/wcm/Products/CE_View...) maintain your integrations

### PRODUCTS

CE Viewer / Input Module

Check-in Module

Cloud Data Manager

Event Program Toolbox

iMIS Bridges Powered by ATS

iMIS Bridge Dashboards

SSO

Other Integrations

iMIS Catalog

iParts

Job Bank

Online Marketplace



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## iMIS Bridge Modules

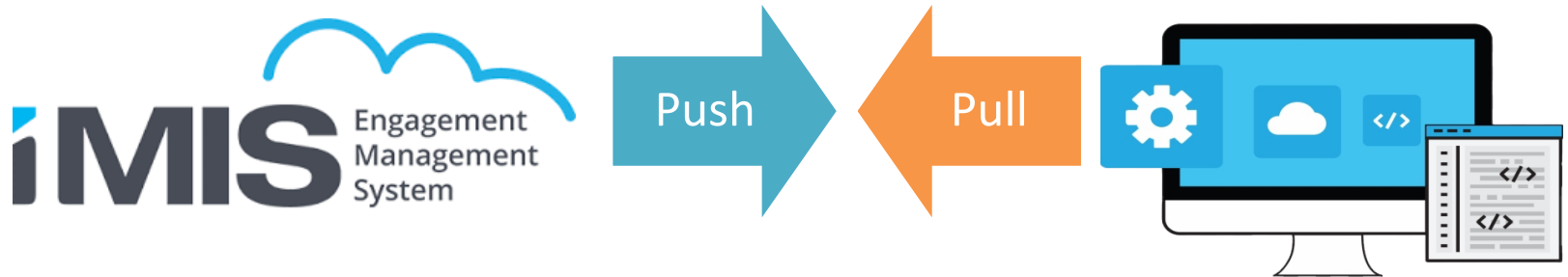
- ✓ Use iMIS Application Programming Interfaces (API)
- ✓ Use third-party API's (e.g., Zoom)
- ✓ Often developed in conjunction with vendor
- ✓ Highly flexible and configurable



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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., SAML2.0, OpenID Connect, OAuth, Token)
- ✓ iMIS Bridge SSO respects Authentication (can you login?) and Authorization (do you have permission?)



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# Single Sign-On

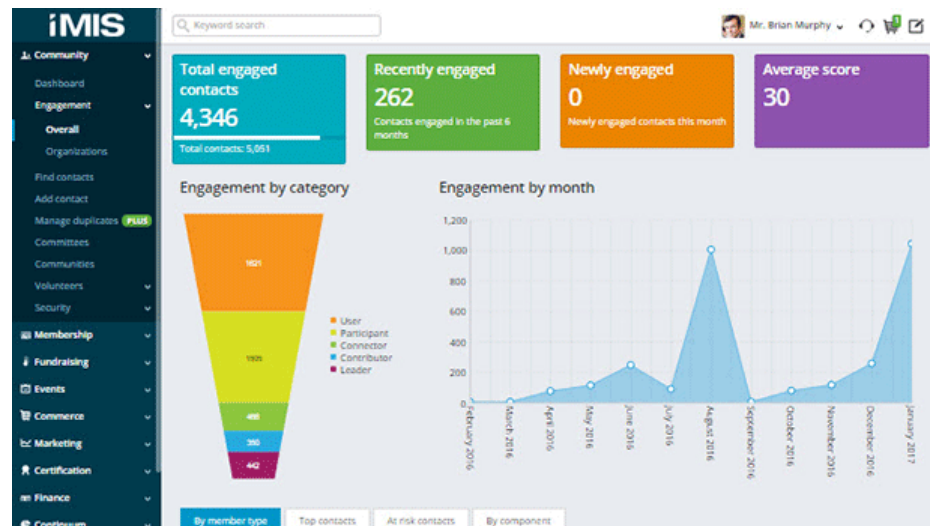
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- ✓ Two major components
  - ✓ Authentication – Can you login so we know who you are?
  - ✓ Authorization – Are you authorized to login to the third-party system?
- ✓ Can be licensed separately for custom applications
- ✓ Can include writing of an activity when someone logs in
- ✓ Can redirect users to a custom “you are not authorized page”
- ✓ Can allow for editing of the profile or reviewing required fields before completion of the SSO.

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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 click on a link in an email?
  - ✓ 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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## Typical Implementation

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- ✓ Use cases are discussed in pre-sales
- ✓ Agreement is signed
- ✓ Kickoff call with client and vendor (when applicable)
- ✓ ATS installation and configuration. This includes creating of general lookup tables, activities, standard IQA's, SSO, etc.)
- ✓ Client configuration as necessary (e.g., configuration in the vendor application, custom IQA's, etc.)
- ✓ Testing
- ✓ Go Live

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## What if I am already using the third-party vendor?

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- ✓ Integration points are based on best practices as developed jointly with the vendor
  - ✓ May require modification to the SSO technology
  - ✓ May require changing where data is stored at the vendor (e.g., where the iMIS ID is stored)
  - ✓ May require changing where data is stored in iMIS (e.g., where course completion data is stored)
  - ✓ May require “backfilling” of data at third-party vendor or in iMIS
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- ✓ ATS has transition plans for these scenarios based on your particular use cases

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## What are some of the things we hear?

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- ✓ I will just export the data and transfer it to the vendor
- ✓ I will just use an import tool to bring the data back
- ✓ I can move data using an automation tool
- ✓ I will write my own integration
- ✓ The vendor says that they have their own SSO

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## Realities of these approaches

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- ✓ Require human intervention
- ✓ Still have to dedupe in some instances
- ✓ Still have to connect tools together
- ✓ Have to train the vendor on how iMIS handles SSO
- ✓ Error handling isn't always addressed
- ✓ Changes to API's need to be addressed in both iMIS and third-party vendor

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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 can be created as prospect records

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## Example Use Case – Map Your Show and MCI

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- ✓ SSO to Map Your Show
- ✓ Booth sales occur in Map Your Show
- ✓ Map Your Show writes back booth rentals to iMIS
- ✓ SSO to MCI (registration)
- ✓ MCI pulls lists of contacts at the exhibitor and other information to allow for 2 free registrations
- ✓ Registration of booth personnel occurs at Map Your Show

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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

- ✓ 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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## Popular Solutions

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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



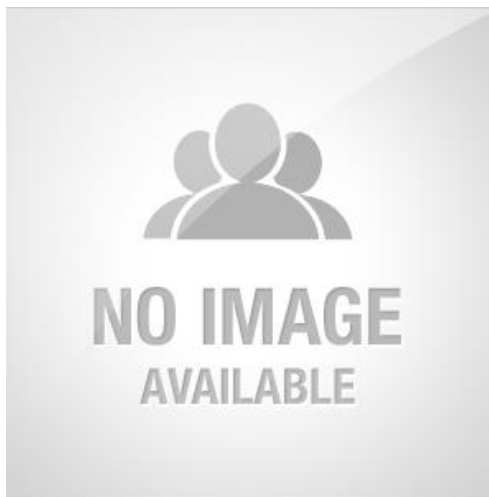
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