

Higher Logic-iMIS Integration

1.0 Overview

This document details the integration between Higher Logic's Community and ASI's iMIS AMS. The integration between iMIS and your Higher Logic Community site drives object creation on the site from the vast amount of up to date member data that you already track in iMIS. The integration ensures that your members interact with the most up to date member data, boosting member participation, collaboration and retention. After the integration is in place, it is not necessary to complete any additional work to ensure that the data reflected on your community site remains synchronized with iMIS. Given that Higher Logic is a consumer of data from iMIS, a periodic check of changed records in iMIS (Periodic Refresh) coupled with a comprehensive refresh of each updated record (Member Refresh) yields a robustly integrated ecosystem. Optionally, activities from the community site can be written back to a member's record in iMIS. These activities can be reported on with other data in iMIS to find actionable business intelligence.

Higher Logic has been integrated with ASI's iMIS platform since 2009 and there are over 100 iMIS clients using Higher Logic's community platform to engage their members. This document describes the integration with iMIS 15 and higher. Integration with iMIS 10.6 and higher is also possible, that integration is different than what is described here.

2.0 Features

The Higher Logic-iMIS Integration has several integration points to create robust experience for your community members. The integration is accomplished by calling iMIS's methods for single sign-on (SSO) and iMIS Web services, as well as some custom Web services, developed and deployed by Higher Logic. There are no extra license charges for this integration from ASI and the setup of the integration does not require assistance from ASI. However, several database objects are installed for the integration and the client may elect to have ASI, or one of its partners, assist with the deployment and modification of these objects to include different business logic if the client does not have access to their iMIS database and/or the ability to modify SQL objects.

These database objects are supplied by Higher Logic, and work out of the box, however, they are extremely easy to modify to include extra fields and change their business logic.

Single Sign-On

Single Sign-On (SSO) provides a seamless Web experience across iMIS and other third party systems. It allows users to log on to your Web site once and gain secure, ready access to all related web sites, including your Higher Logic Community. Users use the same login credentials they would use with any iMIS web site and once authenticated, they will not be asked to login again during the browser session. The iMIS login also has a “remember me” function so the user will remain logged in on their computer for a set number of days. Functionality for a forgotten password and resetting of a password are handled through iMIS and not within Higher Logic’s Community.

Member Profile & Demographic Data

iMIS is your database of record. The integration generates a member’s profile in your community based upon data that is already in iMIS. This includes name, job title, company, address, email, phone, and social profiles. However, these can be changed during installation, or afterward by modifying the database objects used by the integration.

A member may change their information by using the iMIS web site My Account pages. Edit/Add links on a members profile in your community are directed to those iMIS web pages. Using your existing member self-service pages means you aren’t paying for someone to re-create functionality you already have. Plus any customizations you have made, or will make in the future, only needs to be done in one place, iMIS, your database of record.

Member Demographics

There are other demographic items you may want to bring over from iMIS that are stored on a member’s profile under demographics. These can range from a single value, like the number of employees or a job function code, to multiple values as would be stored in demographics or educational information. This can also include User Defined Fields in iMIS. These can be setup during the installation, and are easily modified later.

Member Community Groups

Member Community Groups in your community site drives membership and access to many of the features on the site including Discussion Groups, Libraries and Microsites. Each iMIS-integrated Community has a unique identifier, display name and limiting logic on the Higher Logic side that controls which users can view and access community content. Only the members of a Community as determined in iMIS can view the affiliated Resource Library and Discussion Group. Community groups are usually created around committees, chapters and events, but can really be derived from any field in iMIS.

For example, committees in iMIS can have a dedicated community, and members of the committee are automatically added to that dedicated community, and are members of it as long as their committee term is active. Those who are not members of the committee would not have access to this specific community.

These Community Groups can be setup during the installation, and changed afterwards by modifying the database objects used by the integration.

Security Groups

Security Groups can be thought of as “Roles” and are a powerful tool for limiting viewing and access for navigation and content items on your community site. On your community site, users are broadly batched into Security Groups. Individual users can belong to multiple Security Groups. Out of the box, your site will be configured with four Security Groups:

1. **Public** – Any user, regardless if they are logged in or not.
2. **Authenticated** – Any logged in user (they may or may not have member status)
3. **IsMember** – A logged in user with a single or combination of security groups defining membership. Content and functionality is routinely protected to Members as a benefit of membership. Those with **IsMember** privileges also belong to the **Authenticated** Security Group.
4. **HLAdmin** – Global administrators (SuperAdmins) with universal access and editing privileges. These users are designated with the Community Admin portal, not within iMIS.

Organizations with multiple types of memberships or roles can represent those types by adding additional Security Groups. The most common of these is the “Staff” Security Group for employees of the organization. Others include “Associate Member” or “Student Member.” Security Groups can also be used to assign members badges, or ribbons. Conference speakers, volunteers, and others can be awarded badges based on data in iMIS, by creating Security Groups and assigning badges to those groups.

These security groups, or roles, can be setup during the installation, and modified afterwards by modifying the database objects used by the integration.

Member Refresh

It is important that a member’s profile and related groups be up-to-date, so they have the correct access and their profile information is correct when the member, and others searching the directory, view the profile. Thus the profile will be completely refreshed on 2 occasions: upon the member logging in to the community and during a periodic refresh.

The periodic refresh can be scheduled to be at any interval based on your organization's needs; every 30 minutes works well for most groups.

Event Calendar

The Event Calendar in your community can include meeting products from iMIS. The iMIS meeting products shown can be limited to given event types in iMIS. These events are refreshed at the same interval as the Member Refresh.

Activity Sync

Higher Logic uses its optional Activity Sync module to write back members' community activities to iMIS, creating a single source of valuable data and generating useful business intelligence that can be used to inform the overall engagement strategy of your organization. Activity Sync is a powerful tool that gives you a 360-degree view of member engagement within iMIS, enabling you to generate engagement reports, create targeted marketing campaigns, gain valuable insights on member activities and use that information to inform future engagement strategies and to find actionable business intelligence. Around 100 different activities are automatically written back to iMIS using Activity Sync in the following areas:

- announcements;
- automation rules;
- blogs;
- communities;
- contacts;
- discussions;
- events;
- glossary;
- mentoring;
- resource libraries; and
- volunteering.

Results	Record History	Activities-All	Change Log	Roster	Letters	Notes	AR/Cash	Billing	Events	Orders	Exhibition	Certification	Guild	Awards	Industry Activity	Speaker	Coupon Usage	PERS	PERS Rating
Date	Type	Product Code	Description	Note	Thru Date	Amount	Units	Attachment(s)											
5/28/2014 11:36:41	nPOST		Community Group=NetVU Staff subject=RE: test -please disregard			0.00	0	0											
5/28/2014 11:09:29	nPOST		Community Group=NetVU Staff subject=test -please disregard			0.00	0	0											
5/23/2014	COMMITTEE	COMMITTEE/DISAST	Disaster Committee		12/31/2014	0.00	0	0											
5/9/2014 8:30:00	PrnPOST		Community Group=NetVU HUB subject=Website maintenance May 12th			0.00	0	0											
5/9/2014 7:29:59	PrnPOST		Community Group=NetVU HUB subject=Website maintenance May 12th			0.00	0	0											
5/9/2014 7:25:27	PrnANNOUNCE		Title=Website maintenance May 12th			0.00	0	0											
5/2/2014	COMMITTEE	COMMITTEE/INTEGR	Integration Task Force		3/31/2015	0.00	0	0											
4/8/2014	COMMITTEE	COMMITTEE/DR-ED	WorkSmart Education and R&D Committee		3/31/2015	0.00	0	0											
4/4/2014 7:05:00	PrnPOST		Community Group=NetVU HUB subject=My Vertafore and PERS site upgrades			0.00	0	0											
4/4/2014 7:05:00	PrnPOST		Community Group=NetVU HUB subject=My Vertafore and PERS site upgrades			0.00	0	0											
4/4/2014 6:05:03	PrnPOST		Community Group=NetVU HUB subject=My Vertafore and PERS site upgrades			0.00	0	0											
4/3/2014	COMMITTEE	COMMITTEE/DR-APVAMS360	Research & Development Committee		3/31/2015	0.00	0	0											
4/3/2014	COMMITTEE	COMMITTEE/DR-BEN/BenefitPoint	Research & Development Committee		3/31/2015	0.00	0	0											
4/2/2014	COMMITTEE	COMMITTEE/DR-SAG	Sagitta Research & Development Committee		3/31/2015	0.00	0	0											
3/19/2014	APPLICANT	COMMITTEE/ADVISC	NetVU Advisory Council			0.00	0	0											
3/7/2014 11:49:47	PrnPOST		Community Group=2014 NetVU Conference - Nashville, TN subject=Session E			0.00	0	0											
3/7/2014	MEETING	14INC/LIVESTREAM	14INC - Live Streaming Participation			0.00	0	0											
3/6/2014 10:23:18	PrnPOST		Community Group=2014 NetVU Conference - Nashville, TN subject=RE:NetVU			0.00	0	0											

Once these activities have been added to iMIS, they can be included in reports with other data in iMIS to find actionable business intelligence. These activities are useful when developing in marketing campaigns or when looking for volunteers.

These activity write backs occur in near real-time. As activities occur in a community, they are put into a service queue to be written back to iMIS. Thus, the timing depends upon the load and performance and could be near instantaneous or take several minutes.

Activity Sync can be done with iMIS 10.6 and higher.

Higher Logic Test Instance

In general, test instances of Higher Logic communities are not created. While most AMS companies supply a test instance of their application, it is not really needed for a Higher Logic community. iMIS is your database of record, and all member data in your community will come from there, and any issues with the data only need to be updated in your system of record, iMIS, to be updated in the community. Moreover, your community's launch will be several weeks after the integration has been setup so you will have time to review and fix any data issues.

During upgrades to your AMS, please supply Higher Logic with any updated URLs and methods so that we can test that they are still returning the data as expected. Please note that there will be a nominal fee for this testing.

If you do wish to have a separate test instance of your community, you can pay for this, but the fees are similar to having another community site.