

# Best Practices for Building Directories in RiSE

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
- 2015 Authorized iMIS Solution Provider (AiSP) of the Year

# Hosted by

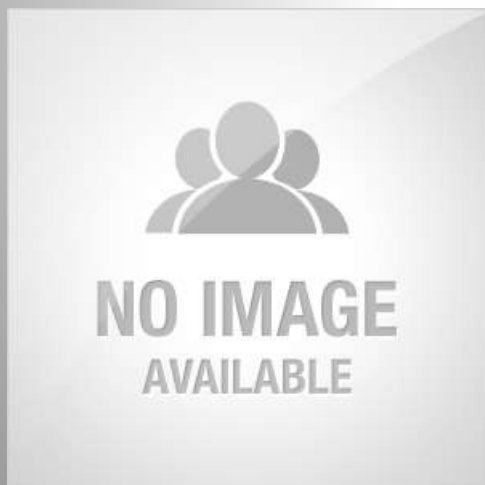


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# Directory Types

- Searchable Member Directories (Individuals and Companies)
  - Find other members
  - Physician Search
  - Buyers' Guide
  - Dining Guide (restaurant searches)
- People/Company Listings
  - Staff List
  - Committee Members List
  - Sponsor Lists

# When to Use Each Directory Type

- Searches
  - Large number of records
  - Many different filter options
  - Search by location/distance
- Lists
  - Smaller number of records
  - No filter options
  - Data doesn't change often

# Common Concepts

- Searching
  - by Name
  - by Type of Record
  - by Specialty
  - by Location
- Results
  - Display just a few key pieces of information
  - Sorted in a logical way
  - Link to profile page with more information
  - Maintain search results
  - Use pagination

# Common Concepts cont.

- Profile Page
  - Members Only Data?
  - Google Map
  - Clickable Categories
  - Link to Update My Profile

# Available Tools

## Out-of-the-box tools

- ContentHtml iPart
  - Allows you to add data to a RiSE page using HTML
  - Contains a WYSIWYG editor
  - Utilizes Link Manager and Image Manager
- Query Menu iPart
  - Allows you to display any IQA query on a RiSE page
  - Allows users to search and filter results
  - Ability to link to other pages from results
  - Results will be displayed in a Grid View or a Google Map (configuration option)



# Available Tools cont.

More out-of-the-box tools

- \* Panel Editor iPart (profile page)
  - Used to display data in the iMIS database on a webpage
  - Highly Configurable
  - Uses default iMIS security to allow (or not allow) editing data
- Summary Display iPart (profile page)
  - Used to display results from an IQA with the look and feel of a panel instead of a grid
  - Only works when the result of the IQA is one row
  - Read only
- \* Address Mapper iPart (profile page)
  - Displays the address of the record in a google map

# Available Tools cont.

Custom tools offered by ATS

- Custom Query Display iPart
  - Used to display IQA query results
  - Filter options specified in the IQA
  - Can be used to accommodate any look-and-feel requirements
- Geocoding Module
  - Used to update back-end iMIS addresses with latitude and longitude for each address
  - Set it and forget it
  - Configurable
- Custom Development
  - Time and materials basis

# Inspiration

Out of the box

- [IAPD Directories](#)
- [ATS Staff List](#)
- [ASLRRRA Staff List](#)

Out of the box with Custom ATS modules

- [NiUG Committees](#)
- [LOC City Search](#)
- [ASLRRRA Supplier Search](#)

# Inspiration cont.

Mostly Custom Directories

- [OPW Doctor Search](#)
- [Aging Life Care Expert Search](#)
- [NIRSA Buyers' Guide](#)

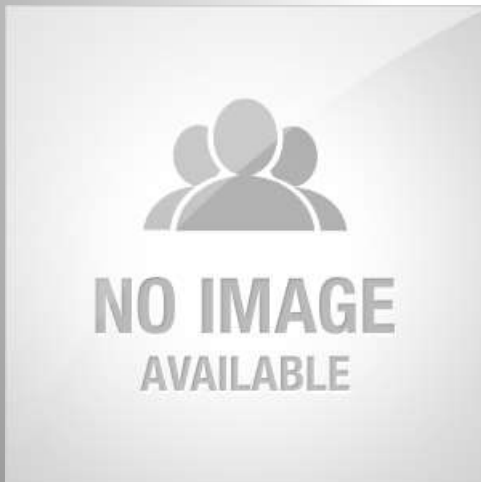
# Questions & Answers



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## Other Questions?

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