

Integrating iMIS with WordPress

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



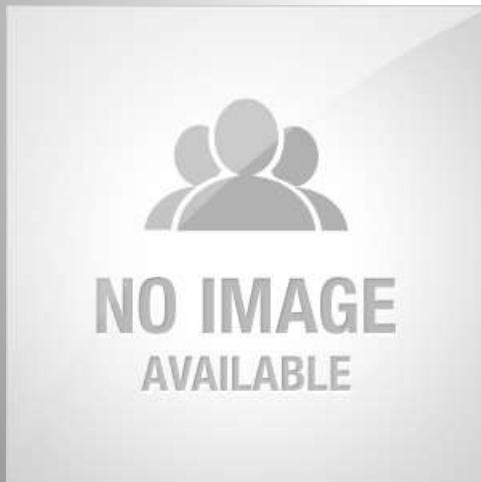
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Richard Banks

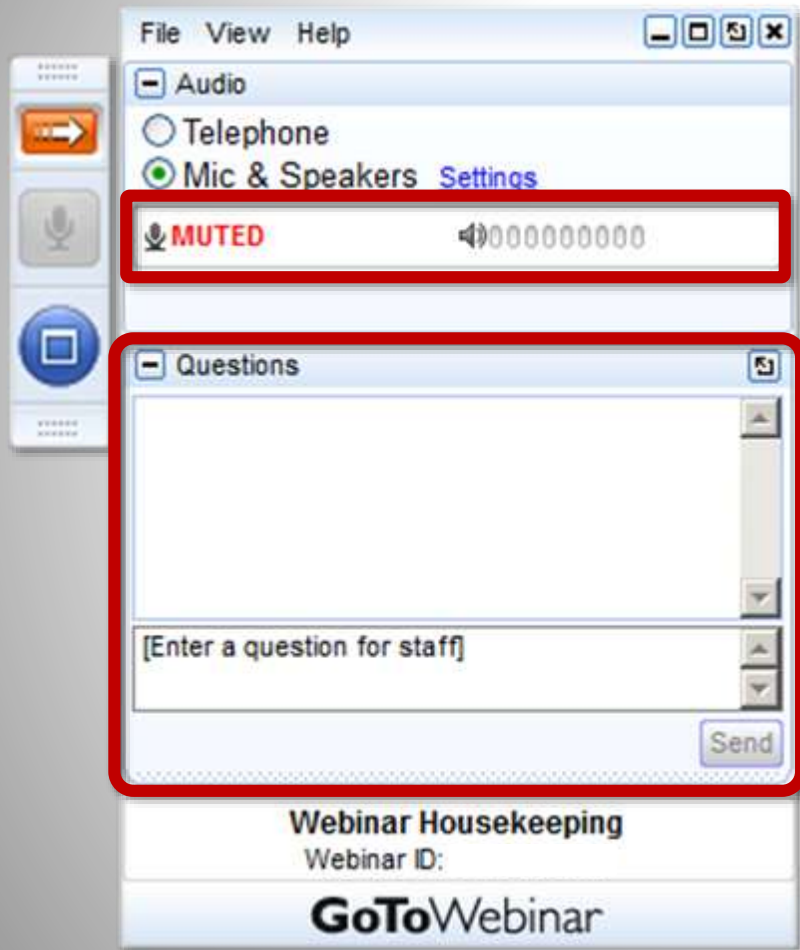
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Using GoToWebinar



- Attendees are muted to reduce background noise
- Remember to ask questions via the Questions panel
- Questions will be answered during Q&A after presentation is complete

Website Models: RiSE only

- Entire Website in RiSE
 - No integration needed
 - One design serves all web pages
 - Single URL
 - Responsive
 - Every page knows who you are



Website Models: RiSE and Third Party CMS

- RiSE and Third Party CMS
 - Results in two CMS solutions
 - Need to develop seamless member experience
 - Goal is that look and feel is identical

The logo for Ektron, featuring the word "ektron" in a bold, sans-serif font. The "e" is orange and the "ktron" is blue.The logo for Sitecore, featuring a red circular icon with a white "S" and the text "sitecore" in a bold, sans-serif font. Below it is the tagline "Own the experience™".The logo for WordPress, featuring a circular icon with a white "W" and the text "WORDPRESS" in a bold, sans-serif font.The logo for Kentico, featuring a white sunburst icon and the text "Kentico" in a bold, sans-serif font.The logo for Drupal, featuring a blue water drop icon with a white "D" and the text "Drupal" in a bold, sans-serif font.The logo for DotNetNuke, featuring a red and grey icon and the text "DOTNETNUKE" in a bold, sans-serif font.The logo for Sitefinity, featuring a colorful icon and the text "sitefinity" in a bold, sans-serif font.The logo for EpiServer, featuring the text "EPISERVER" in a bold, sans-serif font.

What is the ATS WordPress Bridge for iMIS?

- Includes a WordPress Plugin
- Includes a .NET webservice on your iMIS Application Server



WORDPRESS

Website Models: iMIS and WordPress

- Authentication
- Authorization
- Look and Feel
- What goes in iMIS and what goes in RiSE?

Authentication: Who is logging in?

- Single Sign on means having the person login once and only once. **After logging in the person will be logged into all systems and won't have to login again.**
- Two choices
 - Login with the RiSE login page (preferred) – This means you will be redirected to an iMIS login page
 - Login with a form on WordPress – This means that you will be presented with a login form in WordPress that will authenticate against iMIS credentials.
- Single Sign Out can take some work when you look across domains

[WordPress 4.7](#) is available! [Please update now.](#)

WordPress iMIS SSO

iMIS SSO Settings

ATS Webservice URL:

Unauthorized Page:

Unauthorized users will be redirected to this page. You may include the short tag [member-login] on this page.

Login Page Location:

If you select iMIS, the login will redirect to an ATS SSO page that will use a login page on your iMIS site. If you select WordPress, a login form will be generated for WordPress. Include the short tag [member-login] on this page

Save

Thank you for creating with WordPress.

[Get Version 4.7](#)

- Dashboard
- Posts
- Media
- Pages
- Comments
- Appearance
- Plugins
- Users
- Tools
- Settings
- iMIS SSO**

Collapse menu

WordPress 4.7 is available! [Please update now.](#)

WordPress iMIS SSO

iMIS SSO Settings

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WordPress Login Page:

Users will be redirected to this page to Login. You should include the short tag [member-login] on this page.

Username Label:

Password Label:

Login Button Label:

Logout Button Label:

Save

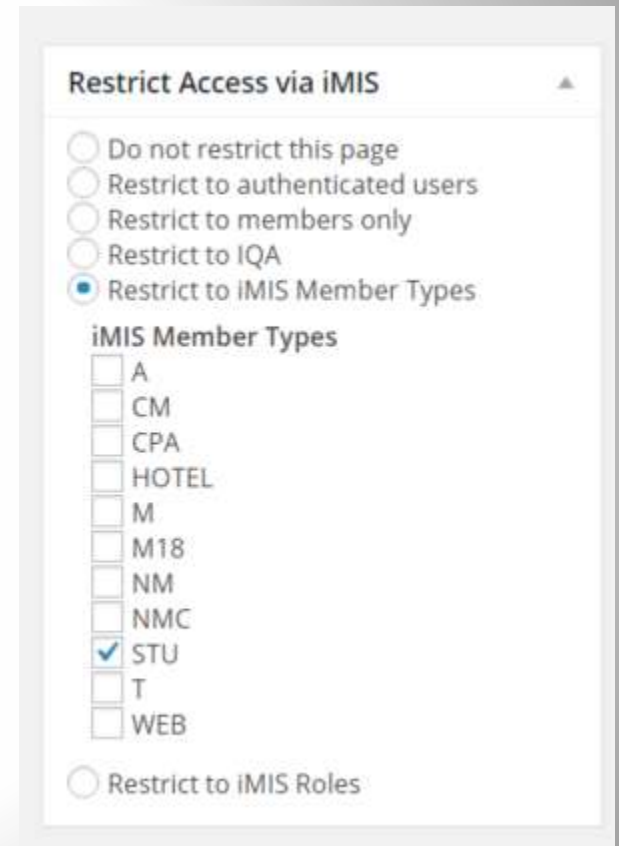


Short Codes

- **"MEMBER-LOGIN"** – This short code will generate the word press login box. It is used when your Login Page Location is set to WordPress
- **"MEMBER-WELCOME"** – This short code will generate a box that gives some context. When not logged in it will say "Sign In". When logged in it will say, "Hi Randy! Sign Out"

Authorization: Who can see what?

- Pages can be setup with the following options
 - Do not restrict this page.
 - Restrict to authenticated users
 - Restrict to members only
 - Restrict to IQA
 - Restrict to iMIS Member Types
 - Restrict to iMIS Roles



The screenshot shows a configuration panel titled "Restrict Access via iMIS". It contains several radio button options for restricting access:

- Do not restrict this page
- Restrict to authenticated users
- Restrict to members only
- Restrict to IQA
- Restrict to iMIS Member Types

Below these options is a section titled "iMIS Member Types" with a list of checkboxes:

- A
- CM
- CPA
- HOTEL
- M
- M18
- NM
- NMC
- STU
- T
- WEB

At the bottom of the panel is another radio button option: Restrict to iMIS Roles.

Example Member Types

The screenshot shows the WordPress admin interface for a page titled "Member Type Only". The page content is "This page is restricted to people with a member type of "STU".". The right sidebar shows the "Restrict Access via iMIS" settings, where "Restrict to iMIS Member Types" is selected. Under "iMIS Member Types", the "STU" option is checked, while others like A, CM, CPA, HOTEL, M, M18, NM, NMC, T, and WEB are unchecked. The "Restrict to iMIS Roles" option is also unchecked. The top navigation bar shows "ATS Wordpress Test" and "Howdy, wptester". The left sidebar lists various dashboard items like Dashboard, Posts, Media, Pages, etc.

WordPress 4.7 is available! [Please update now.](#)

ATS Wordpress Test 3 0 + New View Page Howdy, wptester

Screen Options Help

Dashboard Posts Media Pages All Pages Add New Comments Appearance Plugins Users Tools Settings iMIS SSO Collapse menu

Edit Page Add New

Member Type Only

Permalink: <http://wordpress.atsol.org/index.php/member-type-only/> Edit

Add Media Visual Text

/ link b-quote del ins img ul ol li code more close tags

This page is restricted to people with a member type of "STU".

Restrict Access via iMIS

- Do not restrict this page
- Restrict to authenticated users
- Restrict to members only
- Restrict to IQA
- Restrict to iMIS Member Types

iMIS Member Types

- A
- CM
- CPA
- HOTEL
- M
- M18
- NM
- NMC
- STU
- T
- WEB

Restrict to iMIS Roles

Publish

Look and Feel Through Scraping

- Leverage investment in third party CMS
- Provide a seamless look and feel to the members
- Eliminate need to manage look and feel in both CMS and iMIS
 - Maintain menus in one place
 - Maintain design in one place
 - Maintain images and CSS in one place

What is ATS Scraping?

- Setting up the RiSE template to dynamically apply the design of a third party CMS to the RiSE page in real time
 - If menus change in CMS they change on RiSE page
 - If CSS changes in CMS they change on RiSE page
 - If CMS page renders a **“Welcome Randy”** message at the top of the screen, RiSE also shows that message
 - Not an iFrame

Challenges

- Often hosted on separate servers
- Third Party CMS can contain JavaScript and other widgets
- Unified Searching
- Personalization
- Locking down access to pages

Considerations when Scraping

- Performance/Latency of CMS
- Primary CMS controls Menus not RiSE
- Primary CMS controls CSS not RiSE
- RiSE site will only be as responsive as third party CMS
- SSL Certificate for both sites (wildcard will work)
- Single Sign On with Login in iMIS

Approach

- Create a “template” page in your CMS that will be used to scrape from
- ATS installs a dll on your server that provides the scraping technology
- MasterPage in RiSE is modified
- Configurations are made to identify what page in the CMS to scrape from.
- Access to JavaScript and other components is configured manually

Examples

- Georgia Chamber of Commerce
- <http://www.gachamber.com/>
- Website built in WordPress
- Desire to use that design in RiSE
- Not Integrated with ATS WordPress SSO at this time
- Scraping using ATS Scrape Technology

"About Us" Page in WordPress

About The Georgia Chamber

For over 100 years the Georgia Chamber of Commerce has worked to keep, grow and create jobs to make Georgia a better state for business. Our advocacy, policy and thought leadership help us ensure Georgia's economic competitiveness, attract new investments as well as promote growth and prosperity for all business. As the state's largest business advocacy organization our areas of focus include the following:

GEORGIA CHAMBER IMPACT AND INFLUENCE

The size of our network matters and impactful. We represent investors in every county of our state with a diverse cross section of over 500 industry sectors. Our membership includes both small storefronts and large corporations-no matter the size or type of business. We provide proactive policy, aggressive advocacy and meaningful investor services that impact your bottom line.

- Employees of Members – 2,000,000+
- Grassroots Network – 80,000+
- Chamber Members – 40,000+
- Board of Directors – 400+
- Government Affairs Council – 250+
- Board of Governors – 75
- Executive Committee – 7

About the Georgia Chamber

[About The Georgia Chamber](#)

[Executive Leadership](#)

[International Advisory Council](#)

[Board Members](#)

[Chamber Affiliates](#)

[Staff Directory](#)

[Small Business Advisory Committee](#)

[Small Business Webinars](#)

[Georgia Business Action Network](#)

[Government Affairs Council](#)

[Georgia Chamber Political Action Committee \(PAC\)](#)

OOTB RiSE Login using Template

The screenshot shows the login page for the Georgia Chamber of Commerce Member Site. At the top, the logo for the Georgia Chamber is displayed, followed by navigation links: [Sign In](#), [Create Account](#), [Home](#), [About the Chamber](#), [Blog](#), and social media icons for Facebook, Twitter, and LinkedIn. A search bar with the placeholder text "Keyword Search" is also present. Below the navigation is a menu with links for [ADVOCACY](#), [MEMBERSHIP](#), [SMALL BUSINESS](#), [ECONOMIC DEVELOPMENT](#), [EVENTS](#), and [PRESS ROOM](#). A "JOIN THE CHAMBER" link is located below the menu.

Welcome to the Georgia Chamber of Commerce Member Site

Please sign in below to access members-only content

Username

Password

Remember me on this computer

[Sign in](#)

[Forgot my password](#) or [my username](#)

[Create a new account](#)

For questions regarding your log-in, please call 404.223.2264

[Investor Benefits](#) [Events](#)

[Community List](#)

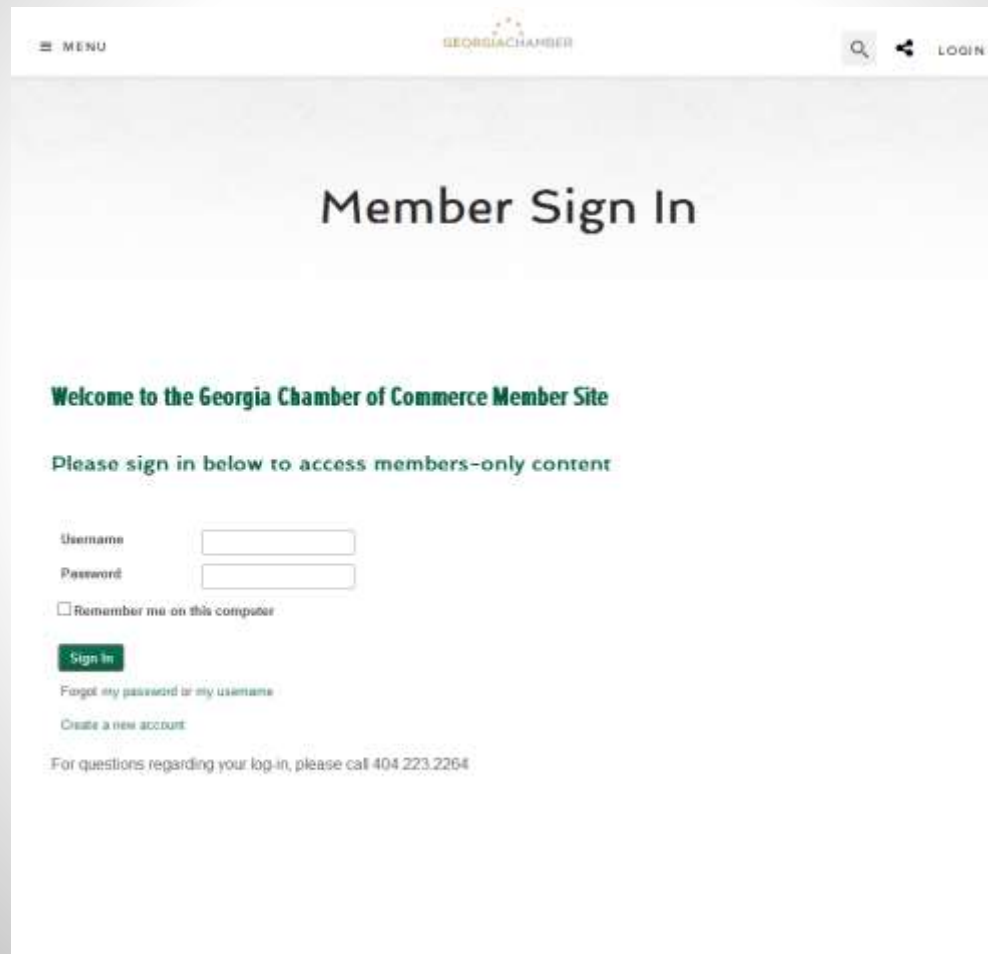
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Contact Us
info@advisot.com

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New RiSE Login using Scraping



The screenshot shows the 'Member Sign In' page of the Georgia Chamber of Commerce. At the top, there is a navigation bar with a 'MENU' icon on the left, the 'GEORGIA CHAMBER' logo in the center, and a search icon and 'LOGIN' link on the right. The main heading is 'Member Sign In'. Below this, a green heading reads 'Welcome to the Georgia Chamber of Commerce Member Site', followed by the instruction 'Please sign in below to access members-only content'. The sign-in form includes fields for 'Username' and 'Password', a checkbox for 'Remember me on this computer', and a green 'Sign In' button. Below the button are links for 'Forgot my password or my username' and 'Create a new account'. At the bottom, a note states: 'For questions regarding your log-in, please call 404.223.2264'.

New RiSE Site using WordPress Design



☰ MENU

GEORGIA CHAMBER

🔍 🌐 LOGIN

Annual Conference

This year's Annual Conference is approaching fast! Register today!

●○○○



Going Mobile Workbook

The Going Mobile Workbook has everything you need to know to get your mobile strategy up and going. Members receive a 10% discount on this book.

[Learn more >](#)



Annual Conference

This year's Annual Conference is fast-approaching. Sessions this year include tips for industry success and a technology exhibit. Don't miss out!

[Register now >](#)



Become a Member

Members enjoy many benefits including networking opportunities, discounts on events and in the shop and up-to-date information on industry news. Join us today!

[Join now >](#)

Summary

- Consider using RiSE for everything
- If you are using iMIS and WordPress, decide what goes into RiSE and what goes into WordPress
- Scraping technique can pull in a real time design into RiSE
- Design is managed in one system
- Consider SSO to lock down pages in WordPress based on iMIS login credentials

Questions & Answers



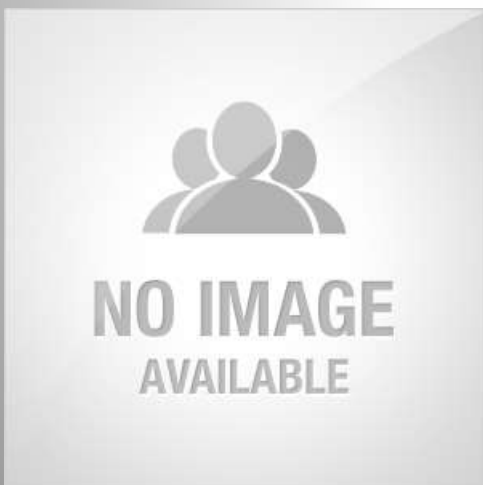
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