



(C)onnect

for iMIS and etouches

Release Notes
Version 7.0

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About Version 7.0

(C) Systems is pleased to provide version 7.0 of our (C)onnect software. This release includes a major set of new features affecting those clients using taxation models that include tax-inclusive and VAT. With version 7.0, etouches transactions under those taxation models will be transferred and properly recorded in iMIS, suitable for tax recognition and reconciliation.

(C)onnect version 7.0 also includes all of the features and enhancements made available since version 6.2. These include:

- Resolution to transaction date entries when posting or pushing older etouches transactions into iMIS. This can occur if etouches disconnects from iMIS – transactions sit in a que and wait until the systems are reconnected.
- Resynchronization of events with new sessions or categories added. Only available for events with unique registrant classes for etouches sub-categories.
- Staff and admin users have the ability to modify the category on a registration.
- New discount codes can be added by staff to an existing registration.
- Registration Payment Summary and Invoice Summary totals in iMIS now show correct amounts.

iMIS Version Support

The version 7.0 release of (C)onnect is supported for the following versions of the iMIS-300 platform.

Minimum Version	Maximum Version
20.1.1.4	20.2.26 (2015 Q4 Release)

If you do not meet these requirements, please contact the (C) Systems support desk for assistance.

Toll Free Phone: 866.687.8729 **Email:** support@cssystemsglobal.com

File Updates

The following files are included as part of this release.

File Name	Version Number
etouchesWebService.dll	7.0.0.11
etouchesWebService.pdb	N/A
etocuhesBridge.dll	1.3.0.0
etocuhesBridge.pdb	N/A
etouchesServiceHost.dll	7.0.0.11
etouchesServiceHost.pdb	N/A

Configuration Updates

While there are no changes to the web.config file for this version, please verify the following entries in the appSettings element are present and set to the appropriate values.

```
<add key="etAuthorizeUrl"
value="https://www.eiseverywhere.com/api/v2/global/authorize.xml"/>
<add key="etPostBridgeUrl"
value="https://www.eiseverywhere.com/api/v2/ereg/createAttendeeBridge.xml"/>
<add key="etLandingPage" value="https://www.eiseverywhere.com/ereg/bridge.php"/>
```

Installation Instructions

To install this release, please follow these steps.

1. Prior to updates, please make sure your iMIS database system contains the etouches_transaction_history table by running the following SQL script.

```
IF NOT EXISTS (SELECT * FROM sys.objects WHERE Name = 'etouches_Transaction_History')
BEGIN
CREATE TABLE [dbo].[etouches_Transaction_History](
    [TransactionID] [int] NOT NULL,
    [EventID] [int] NULL,
    [Secondary_AttendeeID] [int] NULL,
    [AttendeeID] [int] NULL,
    [Date_Posted] [datetime] NULL,
CONSTRAINT [PK__etouches__55433A4B24FDB547] PRIMARY KEY CLUSTERED
(
    [TransactionID] ASC
)WITH (PAD_INDEX = OFF, STATISTICS_NORECOMPUTE = OFF, IGNORE_DUP_KEY = OFF,
ALLOW_ROW_LOCKS = ON, ALLOW_PAGE_LOCKS = ON) ON [PRIMARY]
) ON [PRIMARY]
END
```

2. Backup the (C)onnect production and test folders, if applicable.
3. Copy the DLL files from the deployment page to the \bin directory of the applicable (C)onnect sites. Administrative access to overwrite the file content may be required.
4. Verify the settings in the web.config file for the etAuthorizeUrl, etPostBridgeUrl, etLandingPage entries (see *Configuration Updates*).

Please Note: The update process involving DLL updates will restart the (C)onnect web services and may impact etouches communications for up to 1 minute.

Version 7.0 Updates

This release of (C)onnect includes the following feature enhancements and issue resolutions.

Registration modifications for Tax Inclusive events

Resolution: Modifications made to event registrations where the event was using a tax inclusive configuration (event tax was set to GST-inclusive or the system was set to VAT-inclusive pricing) would result in incorrect financial updates to the registration record.

Background: In previous versions of (C)onnect, (C)Systems had advised users whose events were run using a tax inclusive (GST Inclusive or VAT inclusive) mode not to allow registration modifications. If modifications did occur and were passed to iMIS, the resulting change in iMIS would not take the tax inclusive nature of the function fees into account and result in incorrect financial records.

Details: The update includes a new registration modification routine specifically for GST-inclusive events or systems running in VAT-inclusive mode. This update does not require any configuration changes. However, as with previous versions of (C)onnect, it is important that the tax settings in iMIS are set manually after the event is synchronized from etouches,

For VAT Inclusive systems upon a registration update separate VAT distribution (DIST) lines will be created in the iMIS **Trans** table for each registration function change. It should be noted that, by comparison, the native functionality of the iMIS desktop would attempt to create one line per VAT rate applied to the event. This difference does not affect the financial reconciliation and is equally correct in accounting terms for representation the tax attributable to the registration change.

Modifications to registrations where the original registration included dues (Member Join)

Resolution: Modifications to registrations where the original registration had included a dues payment (member join) would result in an additional payment being properly recorded.

Background: (C)onnect provides the ability to include a membership join as part of the registration process for instances where (C)onnect and the event were configured accordingly. If a registration that included dues was subsequently edited, (C)onnect would record an additional payment against the registration equivalent to the dues fee.

Details: As part of the registration modification process, a check is made to identify the inclusion of dues in the registration, as well as to see if these dues already exist within the system. If the criteria are met, the system will ensure that they are not re-created and that the dues amount is not re-included as part in the event registration payment.

This change requires no configuration changes.

Addition of support for calendar year dues

Resolution: This version of (C)onnect introduces support for dues cycles corresponding to the calendar year (1st January to 31st December).

Background: Previous instances of (C)onnect only supported anniversary-based dues renewal date processing.

Details: To enable calendar year dues the web.config entry for the **duesElements** entry should be changed to "FIRSTOFYEAR". An example of a complete web.config dues configuration element is shown below.

```
<duesElements newMemberType="M" start="FIRSTOFYEAR">
  <dues>
    <add duesCode="ANNUAL" defaultPrice="210" duesType="DUES" />
  </dues>
</duesElements>
```

Issue with not populating work phone and email address on systems where address flow-down was not configured

Resolution: For systems where flow-down is not configured (C)onnect will now populate these fields with the phone number and email address passed from etouches.

Background: The work phone number and email fields are typically populated by address flow-down rules within iMIS or by the use of the etouches Bridge to update extended demographic data following the creation of a registration for a new contact

Details: This change requires no configuration changes to iMIS or (C)onnect.

Issue with invoices not being created for previously complimentary registrations when a priced function is subsequently added.

Resolution: Accurate AR accounting operations are performed for modifications that include fees where the originating registration was complimentary.

Background: In the scenario where a registrant selects only a complimentary registration item on initial registration (C)onnect correctly created no entry in the invoice table for the registration. However if a function was subsequently added which did have a fee associated with it an invoice entry was not always created causing incorrect AR reporting.

Details: This issue has been resolved to ensure that an invoice is correctly created in this scenario.

Optionally Create Account Credentials upon creation of contacts and/or registrations

Resolution: When configured, (C)onnect will create account credentials according to an organization's rules with the creation of a new contact record.

Background: At the end of the registration process account credentials were not created for iMIS users when new contact records were created or in cases where there are no credentials for an existing contact.

Details: (C)onnect can now be configured to create account credentials (username and password) according to rules configured in a SQL stored procedure. This can also optionally occur at the end of the registration process, after the registration has been saved to iMIS. This check includes the option to re-enable a previously disabled account.

The functionality contained within this change is controlled via a number of settings in the (C)onnect web.config file, described below.

Element
<code><add key="CreateNewContactCredentials" value="true"/></code>
Description
Include this setting if account credentials should be created at the same time as creating new contact records within iMIS.

Element
<code><add key="UserCredentialsProcedure" value="MySqlProc"/></code>
Description
If the setting above is included (and the value is true) then this setting must also exist. The procedure must accept 4 parameters as follows: <i>@id</i> - Input parameter taking the ID of the newly created contact record <i>@UserID</i> - Output parameter returning the username to be used when creating the account. <i>@Password</i> - Output parameter returning the password to be used when creating the account. <i>@Result</i> - Output parameter - used to return an error message from the procedure should it not be possible to generate a username and password.

Element
<code><add key = "LogNewAccountCredentials" value="true"/></code>
Description
This setting will cause (C)onnect to save the details of the newly created account in a table named ConnectNewAccountCredentials - This table will be created automatically if it does not exist.

Element
<code><add key = "CreateAccountForExistingContacts" value= "true"/></code>
Description
This setting will cause (C)onnect to check whether the registrant has an account and depending on the rules set up in the associated procedure (see below). The procedure identified in the following setting will be executed and depending on whether the user has existing credentials or the account is to be re-enabled, or no action to be taken.

Element
<code><add key = "ExistingAccountCredentialsCheckProcedure" value= "SqlAccountProc"/></code>
Description
<p>This setting specifies the stored procedure to be called if the CreateAccountForExistingContacts setting is set to true. The procedure must be set up with the following parameters.</p> <p>@ID - Input parameter taking the ID of the newly created contact record @EnableAccount - Boolean output parameter specifying whether or not an already existing account should be re-enabled @CreateAccount - Boolean output Parameter specifying that a new account should be created.</p> <p>Note that this procedure must not return a value of true for both the output parameters. This will be treated as an error condition by connect and no further action will be taken. If the result of the procedure indicates that a new account should be created the procedure specified in the UserCredentialsProcedure setting will be used to determine the username and password and LogNewAccountCredentialsvalue will be used to determine whether the new account should be logged.</p>

Improved event definition modifications

Resolution: The discounting mechanism within (C)onnect meant that when resynchronizing an existing event, if the function name exceeded a certain number of characters the addition of "DISCOUNT - " which (C)onnect adds to the discount version of the functions, caused (C)onnect to error and not apply the event definition updates to iMIS.

In addition, if the discount function (DISC) is removed from the event definition, (C)onnect will recreate it.

Background: When resynchronizing an existing event, errors would occur for long function names and also the presence of the default discount function was not checked.

There was also an issue where the default discount function (function code DISC) was manually deleted from the iMIS system this was not being re-created by (C)onnect. This function is essential to the functioning of (C)onnect and would prevent registrations and updates to registrations saving correctly.

Details: This change requires no configuration or usage changes to (C)onnect or etouches.

Etouches bridge allows demographic changes to fields in the iMIS Name table

Resolution: Extended demographic information which affected fields in the iMIS Name table is now being saved.

Background: (C)onnect permits extended demographic information (etouches attendee information or additional questions) to be written back to iMIS as part of the registration process via the etouches bridge. An issue existed where although changes to most iMIS tables worked correctly, demographic questions whose results were should be saved in the **Name** table did not persist correct. This was caused by an incorrect save order resulting in the changed values being overwritten by the original values.

Details: This change requires no configuration or usage changes to (C)onnect or etouches.

etouches Bridge Authentication iPart

Resolution: A RISE-compliant iPart is available to handle single sign on operations between iMIS RISE and etouches.

Background: In earlier releases it was necessary to either use content HTML iParts or custom ASPX pages hosted on the iMIS server to deliver authentication pass-through functionality between iMIS and etouches. With this release an iPart is now available which simplifies this process and allows quick configuration options for setting up this functionality.

Details: This iPart is not included as part of the base (C)onnect release, however it is available to all etouches bridge users free of charge. Please contact us regarding installation or configuration of this component.

Documentation regarding the features and functions of the iPart are available upon request. Please contact (C) Systems at support@cssystemsglobal.com for more information.

Prior Release Updates

This release of (C)onnect includes all updates and features provided in earlier releases including those from the latest release. Those recent modifications include:

Transaction Date Updates (previously available as a hotfix)

Resolution: Transaction date entry for etouches updates to iMIS now indicates the correct transaction and payment date.

Background: It was identified that those registrations and updates which were created on etouches one day or more prior to the post to (C)onnect, through administrative push or sending, would record the current date for the batch and transactions rather than the date of the actual transactions recorded in etouches.

Details: The update includes modifications to the registration persistence and update logic to reconcile with etouches on all financial transactions. These transactions will now be verified against the date etouches has recorded. The date recorded in iMIS will reflect the actual transaction date for sessions with cost and any payments. If necessary, a new batch will be generated for the dates if an open (C)onnect batch is not available.

Additional Information: The process will not accommodate payments that have been back-dated administratively. This capability is being reviewed for a future release.

How to Receive the Update

In order to receive this release of (C)onnect, please contact the (C) Systems help desk to arrange for an update session. (C) Systems team members will schedule a time with your team to perform the installation of the update. In many cases these updates can be performed remotely without taking up any of your team's time in the process.

If you prefer to perform the installation yourself, please let us know. If you are up to date with the latest release then we can provide you with the modified (C)onnect service files. We will just need you to verify your version of iMIS and the date of your last (C)onnect update with your request.

You can contact the (C) Systems help desk for scheduling updates and other (C)onnect queries using the contact information below.

Toll Free Phone: 866.687.8729

Email: support@cssystemsglobal.com