

CIVIREMOTE

A POWERFUL FRAMEWORK FOR
ONLINE INTEGRATION

Jens SCHUPPE (SYSTOPIA),
Björn ENDRES (SYSTOPIA)
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AGENDA

1. Use Cases
2. The CiviRemote Framework - Components and Features
 - CiviRemote Contact
 - CiviRemote Event
 - CiviRemote Activity
 - CiviRemote Entity
3. Dependencies
4. Roadmap

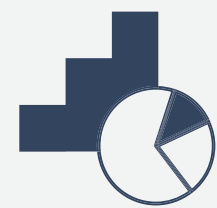


USE CASES



- ▶ Personalized Event registrations
 - anonymous/registered users
 - drafts/updates of registrations
- ▶ Listings of activities
 - filtered by type/status/etc.
 - personalized/restricted access
- ▶ Connecting user accounts of remote environments
 - front-end users matching CiviCRM contacts
- ▶ Restricted views of assignments / registrations
 - custom logic for event registration restrictions
 - display of personal statistics

COMPONENTS



CIVIREMOTE TOOLS

- Abstractions and tools for providing remote APIs for CiviCRM entities
- Contact matching, CiviRemote IDs, synchronization of CiviRemote Roles
- Localisation depending on requested language



CIVIREMOTE API

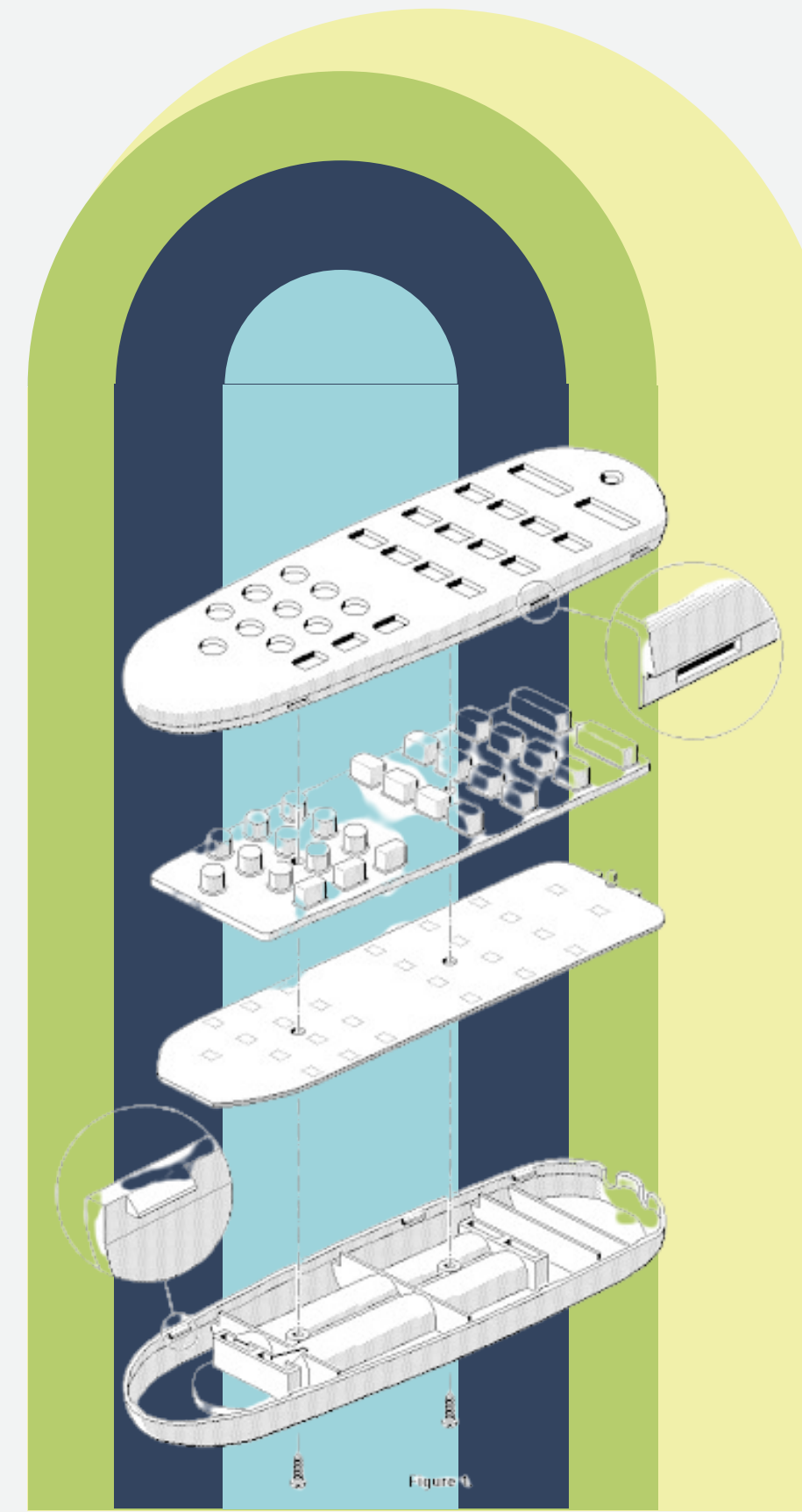
- Corresponding APIs for CiviCRM entities (e.g. RemoteContact, RemoteEvent, RemoteActivity) with configurable/customizable/extendable behavior
- Dedicated permissions and dynamic feature access (i.e. indicator flags for actions on remote entities)



CIVIREMOTE FRONTEND

Implementations of CiviRemote APIs (currently Drupal only):

- CiviMRF Views
- CiviRemote Event, CiviRemote Activity



CIVIREMOTE CONTACT



- Separate Permissions for RemoteContact API actions (get, get_self, update, match, etc.)
- Customizable request profiles for RemoteContact entities, defining accessible attributes, pre-/post-query filtering, sorting, attribute mapping, etc.
- Configurable CiviRemote Roles to use in remote system (e.g. as Drupal roles for access in Views)
- Contact matching/resolving using CiviRemote ID
- Part of CiviRemote Tools

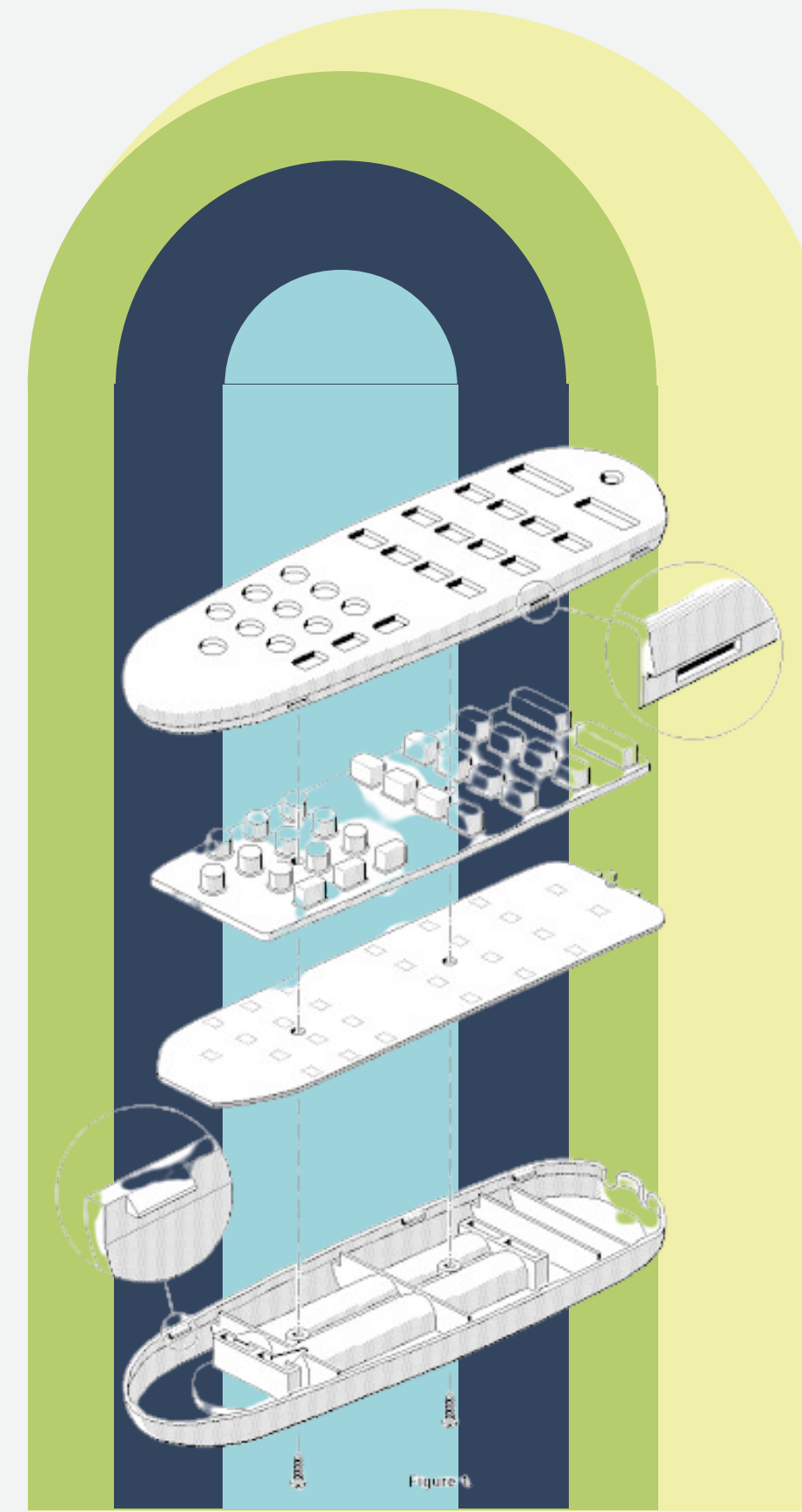
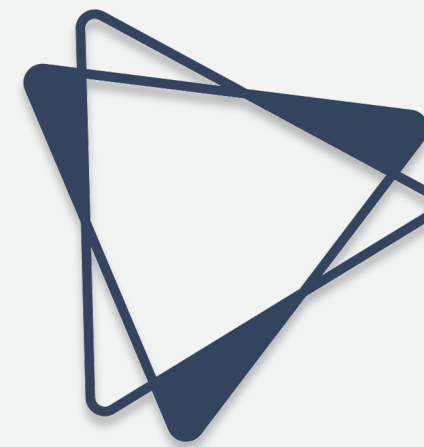


Figure 1

CIVIREMOTE EVENT



- Contact/User-dependent flags for permitted actions (register, update, cancel)
- Profiles for registration/update forms; Form editor
- Configurable “workshops”/”sessions”
- Optional de-activation of public Core online event forms
- Configurable public-facing texts and descriptions
- Contact matching via Extended Contact Matcher (XCM) profiles
- Spawn new events remotely

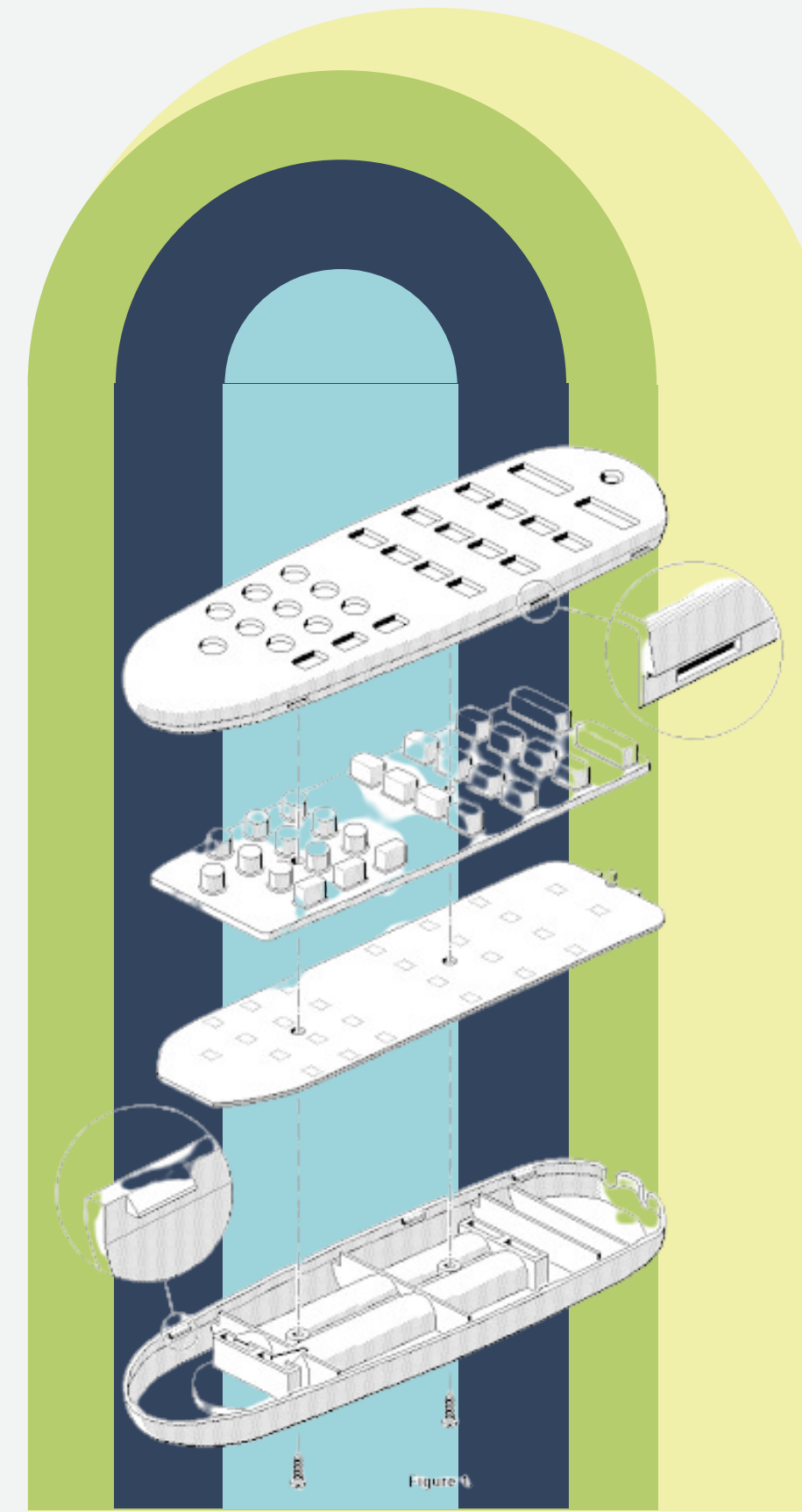
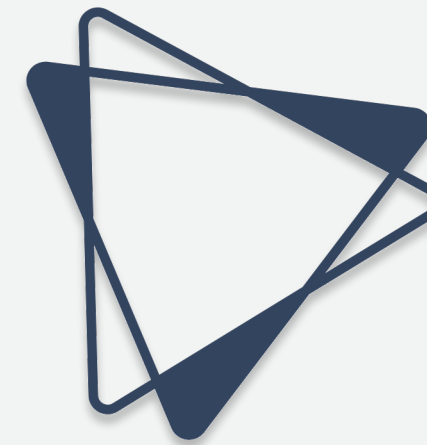


Figure 1

CIVIREMOTE ACTIVITY



- Separate Permissions for remote API (RemoteActivity)
- Read-only remote entity (for now)
- Customization with profiles
- Based on APIv4 abstract remote entities (example for implementation)
- <https://github.com/systopia/de.systopia.remoteactivity>

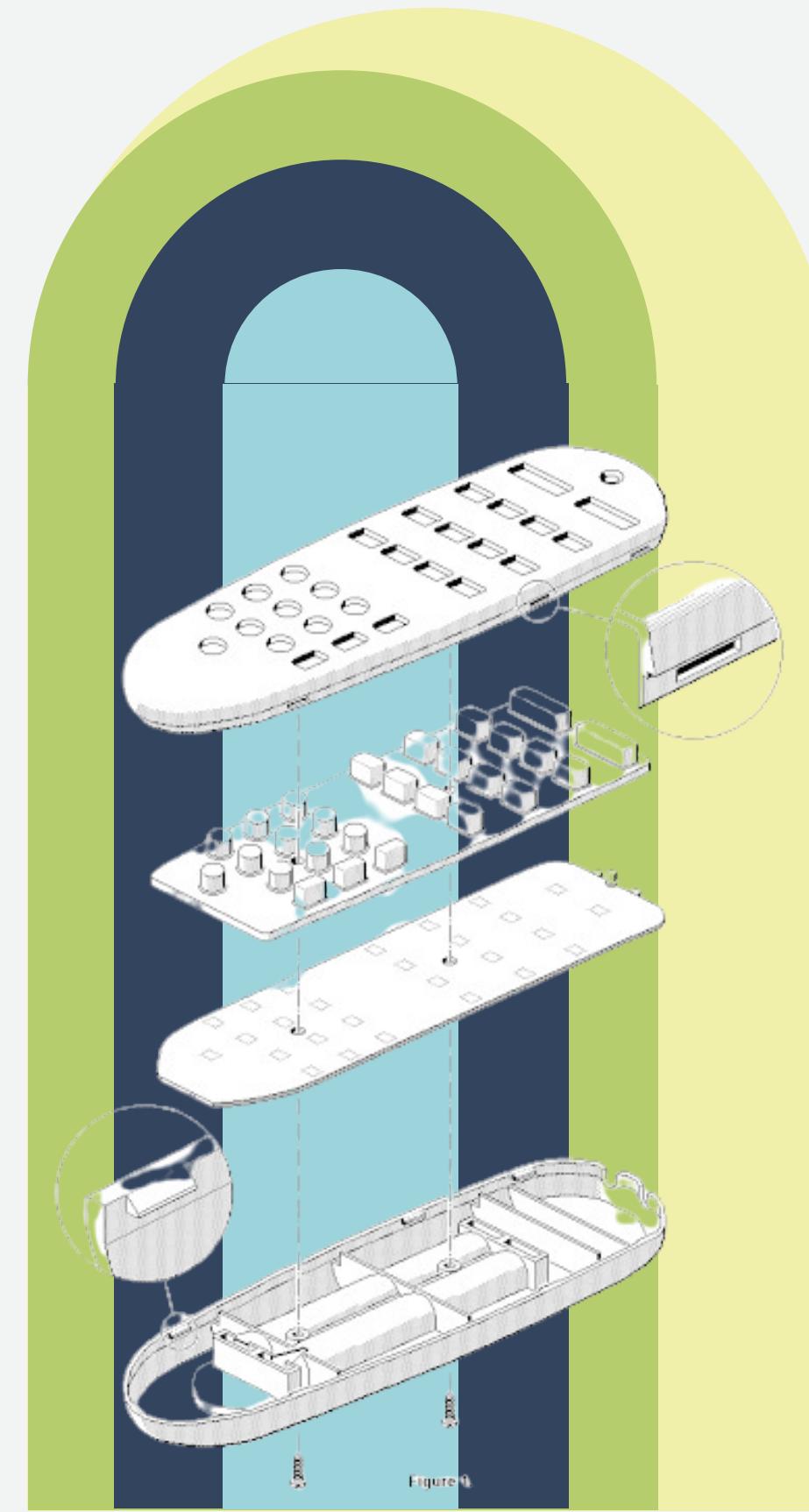
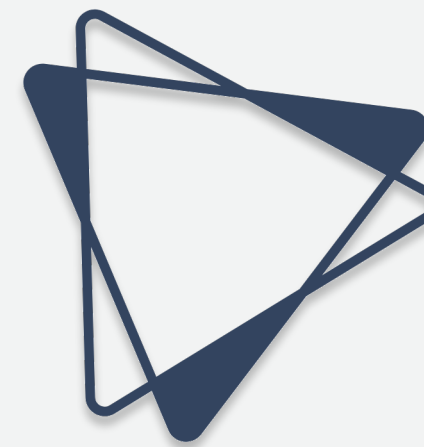


Figure 1

CIVIREMOTE ENTITY

- Abstract remote entity
- Implements common concepts
 - CiviRemote Contact ID
 - Mandatory attributes
- Easy adding of remote entities
- Example: RemoteActivity
 - API only adds permissions
 - adds a default read-only profile

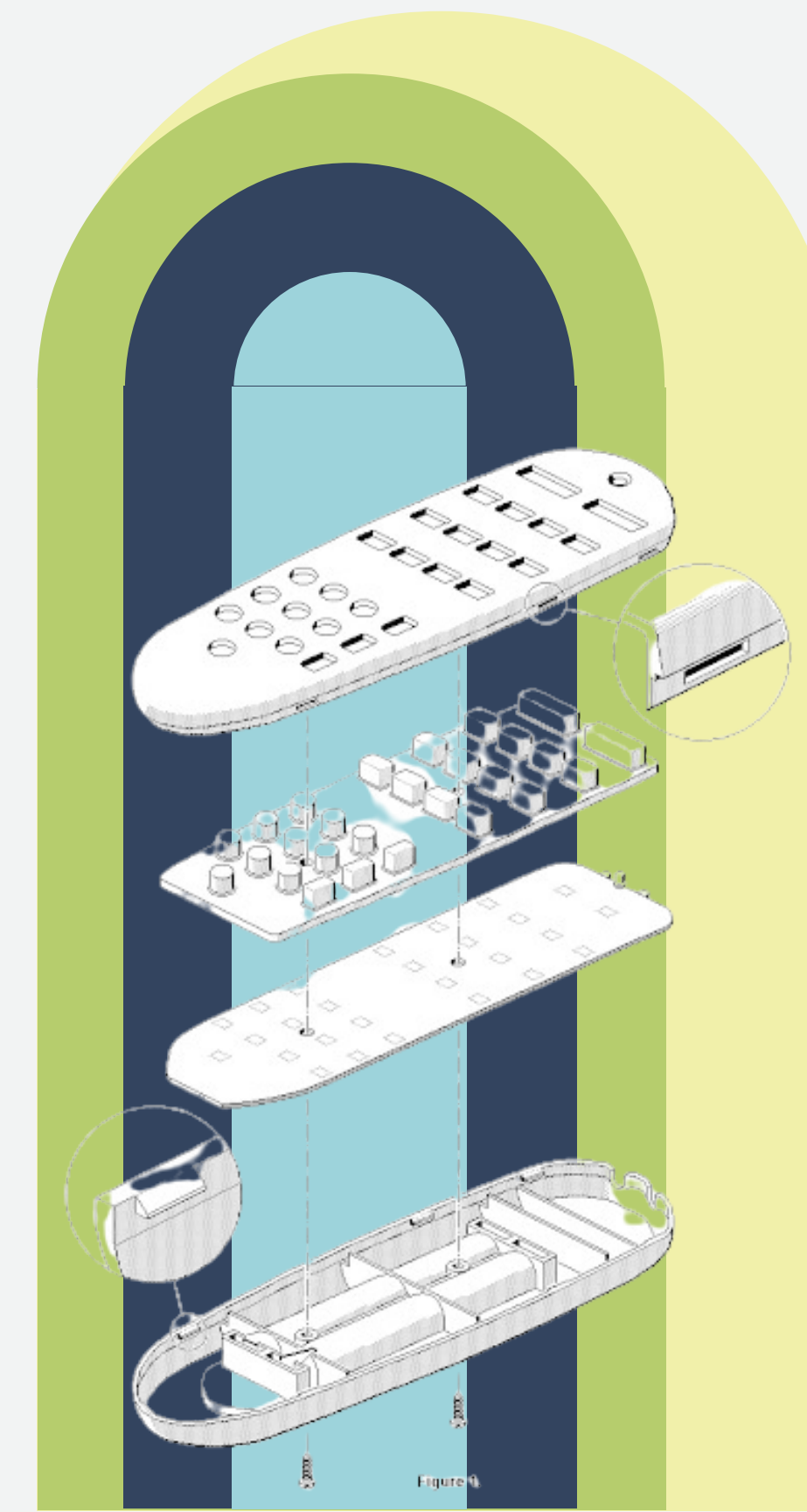
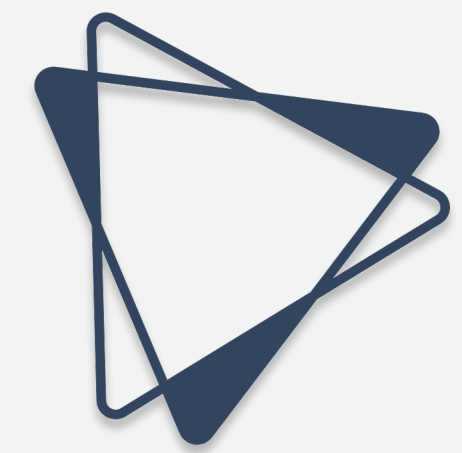


Figure 1

DEPENDENCIES

CIVICRM MODULAR REMOTE FRAMEWORK

drupal/cmrf_core

- ▶ “CiviMcRESTFace”
Generic implementation of the CiviCRM REST API
- ▶ Configurable connections to CiviCRM via profiles (environments) and connectors
- ▶ Support for Views (cmrf_views)
- ▶ Add-on modules
 - CiviMRF Form Processor and CiviMRF Reference (for Webform) - CiviCoop
 - CiviRemote - SYSTOPIA
 - CiviCRM Newsletter - SYSTOPIA





DEPENDENCIES

EXTENDED CONTACT MATCHER (XCM)

<https://github.com/systopia/de.systopia.xcm>

- ▶ Extensive contact matching configuration
- ▶ Add/update contact attributes
- ▶ Create missing contacts
- ▶ Track changes
- ▶ Specific configurations per use-case via profiles





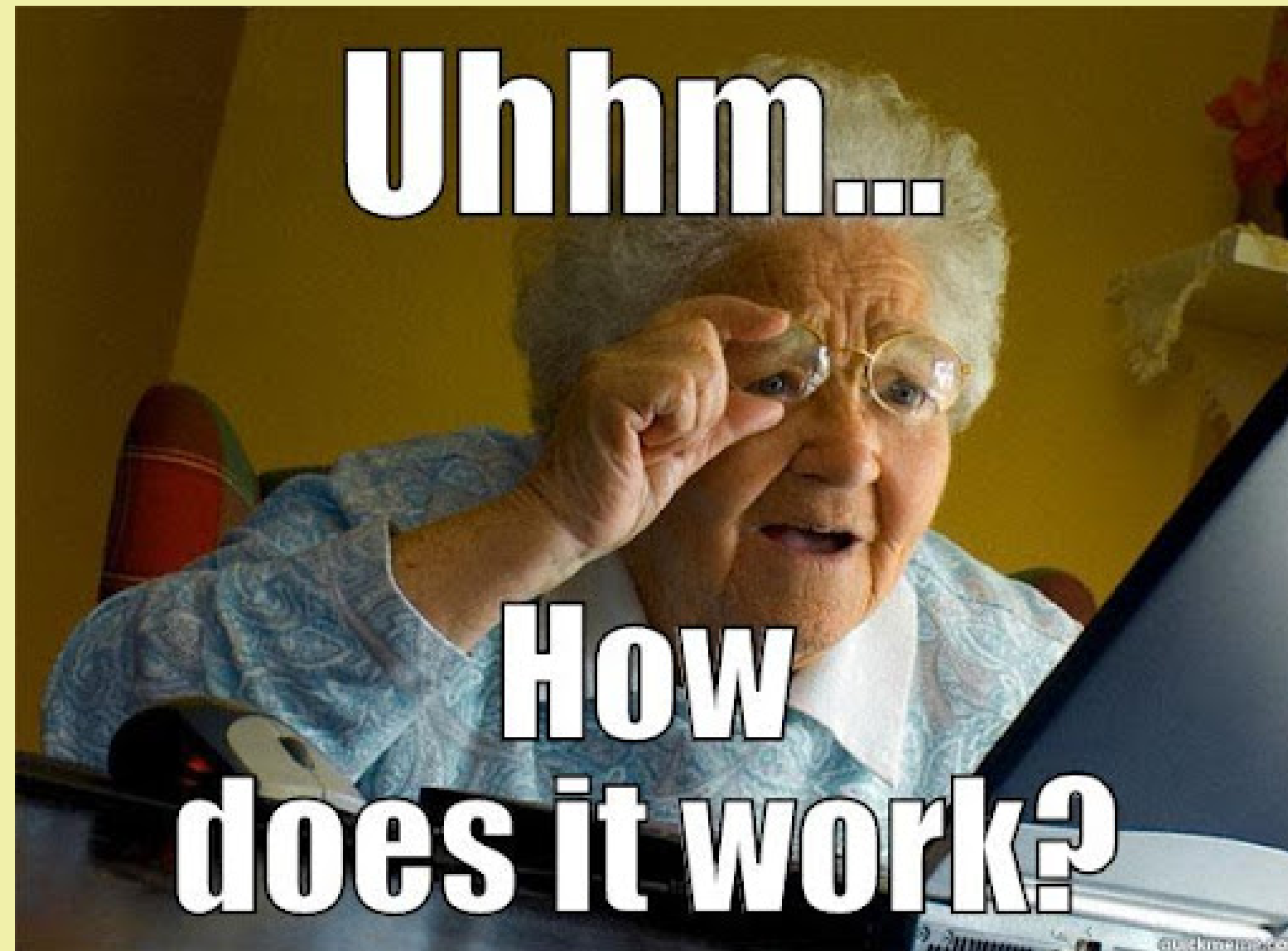
DEPENDENCIES

IDENTITY TRACKER

<https://github.com/systopia/de.systopia.identitytracker>

- ▶ Standardized persisting of different contact identities
- ▶ Tracking history of identities
- ▶ API for identification
- ▶ Matching rule for XCM





LIVE DEMO



ROADMAP

SUPPORT FOR MONETARY EVENTS

- Planned for version 1.3
- Using Price Sets
- Contributing to implementing/refactoring the Order APIv4 - sprint with us!
- future: external payment processors during remote event registration

REFACTORING / CODE QUALITY

- More tests
- More abstraction
- More documentation
- Caching

REMOTE CONTACT EDITING

- Self-service forms
- Management of “my contacts” for human resources managers etc.
- Multi-client access to a single CiviCRM instance’s data

YOUR IDEAS?

- Read the docs
- Try for your use-case
- Contact us

QUESTIONS, IDEAS?

GET IN CONTACT

Jens SCHUPPE

schuppe@systopia.de

Björn ENDRES

endres@systopia.de

 www.systopia.de

 www.linkedin.com/company/systopia

 systopia@mastodon.social

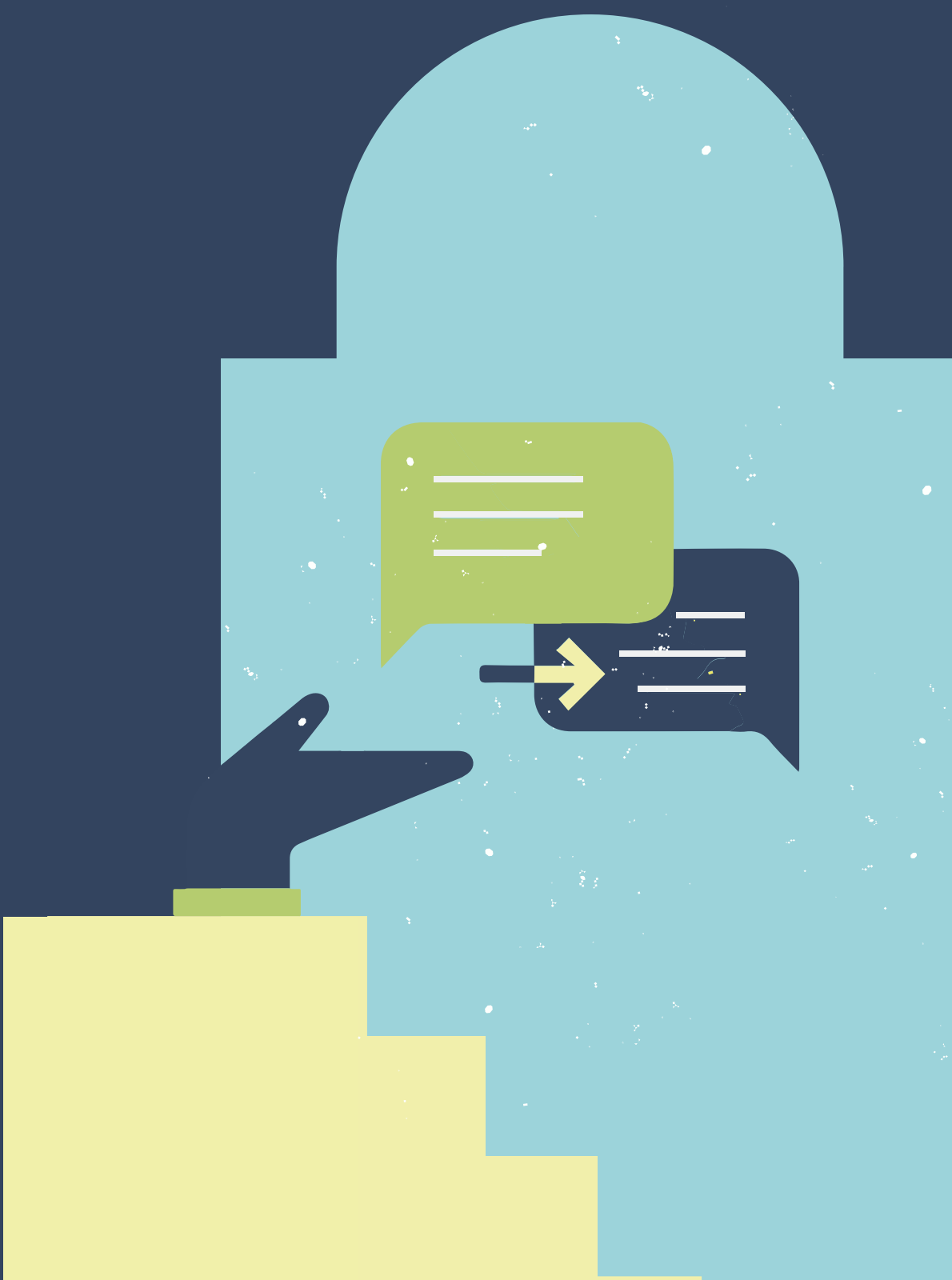
SYSTOPIA

Adenauerallee 12-14

53113 Bonn

Germany

+49 (0) 228 966985-0





ABOUT SYSTOPIA

WE CREATE FREE SOFTWARE.

- ▶ over 10 years of CiviCRM consulting and implementation
- ▶ ~150 non-profit clients
- ▶ over 100 CiviCRM extensions and modules published with free license
- ▶ 21 employees
- ▶ CiviCRM Gold Partner and Contributor

