CIVIREMOTE
A POWERFUL FRAMEWORK FOR ONLINE INTEGRATION

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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/uploads 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
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
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
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
“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
Standardized persisting of different contact identities

Tracking history of identities

API for identification

Matching rule for XCM

DEPENDENCIES

IDENTITY TRACKER

https://github.com/systopia/de.systopia.identitytracker
Uhhm...

How does it work?

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

CIVIREMOTE - 2024-06-03
QUESTIONS, IDEAS?

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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