



NOAH INTEGRATION TO INFORMZ

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INTRODUCTION

NOAH is integrated with Informz from Higher Logic, in order to provide an automated transfer of your subscribers, interest groups and opt-in preferences from NOAH to Informz. In addition, basic email history for each subscriber from Informz is displayed within the contact's profile in NOAH.

All transfers to Informz of interest group subscribers and opt in/out preferences occur within the NOAH Reporter module, via your self-created Library Card selection queries. You continue to build groups based on all data stored in NOAH so that you can target them to your exact purposes. When you have created the group you then transfer it to Informz with the click of a single button. In addition, all of the Opt-In lists that you maintain that are specific to email communications are sent to Informz all at once with a single click. You will then manage which group, and which opt in categories apply to each group, within Informz as part of your marketing automation processes and mailings.

The following describes how to execute the various Informz integration functions within NOAH.

TRANSFERRING A GROUP TO INFORMZ

You continue to use Library Cards within the NOAH Reporter to build selection queries against all of the data in NOAH. Please refer to the NOAH Reporter chapter of the NOAH User Guide for more information on using the Reporter module itself.

Once you have created a library card you will have a standard export to use in the Outputs section of the card that is pre-formatted for use within Informz. By default the export contains the individual's name, their company name and title, their key communication info and their key membership info. This export can be customized to include additional information if desired. When you first initialize your integration we will discuss the data to be included in this export. If you wish to have it modified once live please reach out to our support team for assistance.

If you select to add an Export output product you will notice that the export called "Informz Export" will be one of the choices. Select this to add it to



each library card you wish to transfer to Informz. Once selected you will see it listed in your group of outputs as shown in the following example.

You are here: Contacts » Reporter



Output Product Selections

Emails

[New Product Setting](#) [Return to Library Card](#)

[Run this Job](#) [Go to And/Or's](#)

View	Edit	Delete	Output	Rpt Format	Entry Date	Heading
			Export			Informz Export

Before proceeding, if you wish to make sure your target group is current based on real-time data be sure to click on “Run this Job”. Otherwise your group will be preserved based on the last time you did so. This is intentional as many clients wish to preserve their group as is regardless of changes in the database. If you know you always want the real-time results of your selection query then always click on “Run this Job” when you first come to this page.

To begin the transfer process click on the magnifying glass icon in the first column of the export row to view the Informz Export. You will then see the following screen with the information from your specific library card.



View Library ID: #55 for Export

Category: eMail
Query: Library Card 55, All Members, Informz Export, as of 3/22/2018
1st Heading: Informz Export
2nd Heading:

[Edit](#) [Delete](#) [Return to the List](#) [View Results](#) [Export to Informz](#) [Update OptIn to Informz](#)

Excel - xls [Export](#)



It is strongly recommended that you first click on “View Results” to verify the individuals included in the group is correct. If not, you can adjust your criteria in the library card query to select the correct individuals.

Once you are certain your group is correct, click on the “Export to Informz” button. Your session will be suspended while the transfer takes place, and when finished you will be presented with the message “All records for this library card have been transmitted to Informz”. The transfer is a complete replacement of the group, thus anyone that may have been in the group previously that are no longer in it will not remain. Any that are now in the current group will appear.

If you then login to your Informz account you will be able to view your target group. Within Informz go to Target Groups, then select Interests from the list of target group types. You will then see a screen similar to the following.

The screenshot shows the Informz Target Groups interface. At the top, there is a search bar for Target Group Names and a 'CREATE' button. Below the search bar, there is a table with columns for Target Group Name, Type, Count, Description, and Create Date. The table contains six rows of data:

Target Group Name	Type	Count	Description	Create Date
NOAH55 - All Members	Interests	7		2/5/2018 3:55:53 PM
NOAHOptIn - ADNOTICE - Advertising Notices	Interests	952		2/14/2018 5:59:17 PM
NOAHOptIn - CONFUPDATE - Conference Updates	Interests	953		2/14/2018 5:59:18 PM
Opt-Ins	Interests	0		1/2/2018 4:14:42 PM
Sample Interest 1	Interests	0		2/5/2018 2:34:33 PM
Sample Interest 2	Interests	0		2/5/2018 2:34:34 PM

All groups from Library Cards in NOAH become Interests Target Groups in Informz. The name of the group is “NOAH” plus the Library Card ID, followed by your description of the Library Card. In the example above the Library Card ID is 55, and its description is “All Members”. Thus the Interest Target Group in Informz is “NOAH55 – All Members”. The number of individuals in the group and the date and time you last transferred the group from NOAH is displayed for each group. You can select the group to view each individual and its data transferred from NOAH via the export.

Next you will need to update the Opt In subscribers for all email options. To do so, click on the “Update OptIn to Informz” button. Your session will be suspended while the transfer takes place, and when finished you will be presented with the message “All Opt In/Out preferences have been transmitted to Informz”. You can perform this task from any Informz Export on any Library Card, and the entire group of Opt In lists will be processed each time.



The Opt In groups are created as Interests Target Groups in Informz as well. From the screen shot above, the two Opt In groups that were created by NOAH are “NOAHOPtIn – ADNOTICE – Advertising Notices” and “NOAHOptIn – CONFUPDATE – Conference Updates”. The names are taken directly from your description for each opt in category. In this example our categories are those wanting advertising notices and those wanting conference updates. Within Informz you would then apply whichever Opt In group you wish depending on the specific email you are sending.

Please note, the Opt In group is the list of those opting IN, regardless of the default settings for your list in NOAH. Thus if your default for a list is that they are IN unless they opt OUT, then all individuals are included except those that opted out. If the default is they are OUT unless they opt IN, then only those that have opted in are included. You would then combine your selected target group in Informz with the applicable Opt In group in Informz, and only send email to those in BOTH groups. Please see the Informz user documentation for more help on using these features in their system.

You will continue to use your Opt In/Out lists in NOAH to manage all subscriber preferences via the online profiles of your individuals in your NOAH website. The unsubscribe link you will use in your emails sent within Informz will direct them to their profile in NOAH. Depending on your NOAH configuration the unsubscribe link that you will compose within all emails in Informz will differ. The exact link to be used will be given to you as part of your setup when initializing your use of the NOAH integration for Informz.

AUTO UPDATING THE GROUP IN INFORMZ

Once you have added the export and first pushed your group to Informz you can set the library card to auto-sync with Informz on a nightly basis. This allows for your group and all automation rules in Informz to be based on the most recent members of the group automatically on a daily basis.

In the export settings, click on the checkbox labeled “Sync nightly with Higher Logic” to include it in the overnight sync.



Category: * ⓘ eMail ▼

Query: * ⓘ Informz Export ▼

Sync nightly with Higher Logic?:

1st Heading: ⓘ Informz Export

2nd Heading: ⓘ

Cancel

GLOBAL UNSUBSCRIBE UPDATE

Both NOAH and Informz maintain a global setting for individuals unsubscribing from all email. In NOAH it is managed by unchecking the “OK to Broadcast” checkbox in each email record. In Informz the individual emails are marked as having “Unsubscribed”. NOAH executes an automated update of all emails that are set to not broadcast to set them as unsubscribed in Informz on a nightly basis. There is nothing you need to do to update this list in Informz.

If an individual has globally unsubscribed in NOAH, they will not be included in any group export from any library card at the time you transfer the group to Informz as described above. Thus even if the overnight update has not yet occurred, if you transfer the group to Informz they will not be included when exported to Informz. As stated above, the transfer is a complete replacement of the group, thus if they have been globally unsubscribed they will not be in the group after the transfer. They will not yet be in the “Unsubscribed” list in Informz until the next overnight update, but as they are not in the group they will not be sent an email.

If you schedule your email for delivery at a later date in the future it is possible that a global unsubscribe may have occurred that day, thus you can refresh your target group from NOAH near the time of the email delivery if you wish. They will be processed as a global unsubscribe with the next overnight update.



INFORMZ EMAIL HISTORY

You can view all email history from Informz for an individual via their profile in the NOAH AMS. When on a person's profile, click on the "Informz History" tab. The default data view includes the date and time the email was sent, the mailing name of the email and whether the email was clicked, delivered and opened.

<u>Date</u>	<u>Name</u>	<u>Delivered</u>	<u>Opened</u>	<u>Clicked</u>
9/21/2018 1:11:32 PM	Update Email Preferences	Yes	Yes	No
10/5/2018 11:35:45 AM	New Mailing 2018-09-21 12 -04:00	Yes	Yes	Yes
10/5/2018 12:33:11 PM	New Mailing 2018-09-21 12 -04:00	Yes	Yes	Yes
10/16/2018 1:06:01 PM	181016A Op-Ed Writing Training Available	Yes	Yes	Yes
10/16/2018 2:28:12 PM	181016A.1 Op-Ed Writing Training Available	Yes	Yes	No
10/18/2018 2:12:21 PM	AA181018A	Yes	Yes	No
10/19/2018 12:43:19 PM	C181019A	Yes	Yes	No