



Request for proposal: Abstract Mentor Programme platforms

Summary:

This request for proposal is sent to potential suppliers of abstract handling services and ICT companies to develop platforms dedicated to the Abstract Mentor Programme (AMP) for the 23rd International AIDS Conference (AIDS 2020), the 11th IAS Conference on HIV Science (IAS 2021) and the HIV Research for Prevention conference (HIVR4P).

Proposal submission deadline:

Friday, 14 June 2019

- No proposals will be considered after the appointed deadline.
 - An electronic version of the proposal is required.
 - Incomplete proposals will not be considered.
-

Submit your complete proposal to:

International AIDS Society

Attention: Sophie Andriol, Associate Project Manager, Scholarship
Avenue de France 23
CH-1202 Geneva, Switzerland

Direct line: +41 22 710 08 08

Email: sophie.andriol@iasociety.org

22 May 2019 | IAS Conference Secretariat

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1 General

1.1 International AIDS Society

The IAS is the custodian and lead organizer of the International AIDS Conference, IAS Conference on HIV Science, and HIV Research for Prevention.

1.2 The Conferences

This request for proposal (RFP) covers three separate conferences: the International AIDS Conference, the IAS Conference on HIV Science and the HIV Research for Prevention conference. In this document these three conferences are referred to as the “Conferences.”

The IAS Conference on HIV Science is usually referred to as the “IAS Conference” when talking about the conference in general. When talking about a specific conference, it is referred to, for example, as “the 11th IAS Conference on HIV Science” or abbreviated as “IAS 2021.”

The International AIDS Conference is usually referred to as the “AIDS Conference” when talking about the conference in general. When talking about a specific conference it is referred to as, for example, as “23rd International AIDS Conference” or abbreviated as “AIDS 2020.”

HIV Research for Prevention is the only global scientific conference focused exclusively on the challenging and fast-growing field of biomedical HIV prevention research and it is commonly referred to as “HIVR4P”.

1.3 Project scope

The supplier is responsible for providing, setting up and maintaining an abstract mentoring platform, including a mentor sign-up form, a feedback form, a draft abstract submission form¹, a mentoring management system (back-office), and reporting tool.

These systems are hereinafter referred to as collectively as the “submission systems” or “systems” and shall be integrated with the IAS profile platform.

The IAS profile is a CMS platform directly linked to our Dynamics 365 CRM platform, it allows IAS external users to create an account and register to our conference and participate in related programmes (ie. submit an abstract, apply for a scholarship, etc.).

The IAS profile is integrated with external providers through http redirection and webservice for the synchronization with the CRM.

The actual setup, integration and testing of the systems will be done together with IT developer from IAS. The supplier is responsible for setting up their side of the integration and making all necessary adjustments to the system. It is essential that the supplier is able to make this integration as described in this document in order to be considered (please check [Appendix 1](#) for a more detailed description).

¹ Which is distinct from the conference abstract programme.

The supplier will directly handle any technical issues reported by users through a dedicated email address throughout the AMP opening period.

The supplier will not be responsible for administering the system.

1.4 Format of the proposal

1.4.1 Pricing model

All costs for systems, services, system adjustments, system integrations and other activities mentioned in this document, shall be included in a “per abstract” fee. For purposes of this RFP, an “abstract” is defined as any submission that goes through the mentoring process (ie. assigned to a mentor and receiving feedback).

Only abstracts going through the mentoring process should count towards the total number of “chargeable” abstracts. Duplicate abstracts, test abstracts, abstracts in draft form, withdrawn abstracts and other abstracts that have not been mentored shall not count towards the total.

1.4.2 Currency

All prices should be given in USD. All invoices shall be issued in USD based on the proposed costs in USD, or issued in another currency converted from the proposed costs in USD. If an invoice is issued in another currency the amount will be converted from USD to the used currency based on the exchange rate of the day that the invoice is issued.

1.5 RFP – proposal – final agreement

The proposal should be based on the RFP (this document) and clearly refer to it. The proposal only needs to contain prices, based on the pricing model described above, and deviations from /additions to this RFP. This means that parts of this RFP that cannot be fulfilled or will be performed differently or additional services that are included in the proposal but not mentioned in the RFP, should be clearly specified. Parts of the RFP that will be fulfilled as described in this document do not need to be mentioned.

Service providers answering to this RFP are encouraged to come forward with suggestions on the mentoring process and innovative technical solutions for the systems.

Should the supplier be selected, the RFP and the proposal will constitute part of the final agreement. The final agreement will, apart from standard contractual arrangements, only contain deviations/additions/clarification from the proposal and the RFP. In case of conflicting information between these documents the final agreement shall prevail, then the proposal shall apply and lastly the RFP shall apply.

The final agreement will be based on the IAS’ standard agreement with suppliers.

1.6 Reports and data

During the entirety of the AMP period and for up to 1 year after the closing, the supplier shall render available all data from the programme to IAS – ie. statistics and raw data. A specific part of the back-office should be available to this effect.

Specific reports must also be made available, such as:

- Mentors who applied, including timestamps, area of expertise and demographic data,
- Submissions to the AMP, including timestamps, track categories and demographic data of participants,
- Allocation of abstracts to mentors, including turn-around time between abstract submission and reception of feedback,
- Mentor evaluation.

All reports should be made available as web pages displaying live data. The supplier is encouraged to suggest ways to render the data available.

On request, the supplier shall provide IAS with the mentor and abstract databases in a database format as defined by IAS.

1.7 Timeline, planning and monitoring of the process

The supplier shall actively assist IAS during the planning and development of a timeline for the AMP mentor sign-up and AMP submission system, and monitor the process in close cooperation with IAS.

For AIDS 2020, the mentor sign-up is scheduled to open on 15 October 2019 and the AMP abstract submissions will open on 4 November 2019 and close on 19 December 2019.

1.8 Aim and objectives

The supplier should work toward getting as many submissions as possible with the fastest possible turn around time between submission and mentor feedback. Data should be gathered and stored accurately and as completely as possible. AMP participants and mentors should get the best possible service and have a positive experience.

1.9 Conference and programme representation

Generally, this means that the company name of the supplier should be very discreet when corresponding with participants in the AMP, whether they are abstract submitters or mentors. For example, all correspondence with participants should be done by the conference as the sender. All staff working on the AMP at the supplier should represent and belong to the “Abstract Mentor Programme team”.

1.10 Confidentiality

The supplier or any subcontractors shall not give out any information received during the bidding process (including this document) to a third party without prior written consent of IAS.

All content submitted to the AMP, including draft abstracts, persons involved (whether they are participants or mentors) and feedback given on the draft abstracts must remain strictly confidential.

2 Email inbox

2.1 Maintaining an email inbox

The supplier is responsible for staffing and maintaining an email inbox for the AIDS 2020 AMP. It is the supplier's responsibility to read and reply to all emails sent to this inbox that refer to technical issues. These email addresses will be set up by the IAS and will either be forwarded to the supplier or the supplier will get web mail access.

2.2 Staffing

The email inbox should be staffed and maintained by the supplier at no extra cost. All staff should be trained on the specific procedures for this programme and also get all basic information needed to be able to answer general questions about the programme. Emails should be replied to within 48 hours or on the next working day.

2.3 Staff requirements

All staff manning the email inbox shall write English fluently. Other languages are an asset.

3 General system requirements

The below indicated functions are not the complete technical specification but should at this stage be seen as minimum requirements which will be further specified by IAS. The supplier must be able to and agree to fulfil all of these requirements in order for the proposal to be considered.

3.1 General

The supplier shall have an online management system where all submissions (abstracts and mentor applications) are saved. No extra costs for the system itself shall be put on IAS.

The supplier shall describe their technical solution to support the systems.

The supplier shall provide a staging environment as well as a production environment

3.2 Design of online platforms

The supplier shall provide 3 online submission systems and other related web pages such as the administration back-office, based on detailed specifications by IAS each year: 1) mentor sign-up form, 2) AMP submission form, 3) mentor feedback submission form².

Any improvements and/or modifications to submission systems will be charged at a previously agreed rate as set out in the contract.

All submission systems should only be accessible after login on the IAS profile platform.

3.3 System customization and changes

The design of all web pages and online forms shall in detail comply with the conference graphical profile and the content of the pages should comply with the Conference Style guide.

IAS will specify in detail how they should be built, designed and laid out; what functionality the online pages should have, and what integrations should be made.

IAS will also specify what data should be gathered and how it should be stored.

IAS will test and approve all systems before they may be launched. Even after the initial launch, the supplier shall make smaller changes to the systems, web pages and online forms at any time without any additional cost. The supplier is entitled to charge IAS based upon an hourly or daily fee for new technical developments including programming and new logic.

3.4 Integration with the IAS Conference Profile System

The systems above shall be integrated with the IAS Conference Profile System. The Web Services are used to acquire user data from the profile as well as to update the profile of the user's status in the AMP submission systems.

The integration will use "Web services" integration technology and the setup should be based on the interface specified by IAS. The actual setup and the testing of this will be done together with IAS' ICT team. (Please check Appendix 1 for a more detailed description).

The supplier is responsible for setting up their side of the integration and making all necessary adjustments to the submission systems.

3.5 Data transfer

The supplier shall deliver all submitted abstracts data as well as the mentors data on a weekly basis during the abstract submission period, as well as once the AMP is closed.

² Details are provided in the following sections of this document.

The data shall be sent as a database, maintaining all links between tables. The format of the data will be defined by IAS.

3.6 System capacity

The system must be able to handle a minimum of 100 requests per seconds without a noticeable performance reduction. Over 60% of the abstracts are likely to be submitted in the last week before the deadline.

3.7 Bandwidth

The internet bandwidth for the submission web pages should be dimensioned in such a way that no obvious delays appear for the users even around deadlines when peaks arise. The display time of all webpages must be inferior to 300 milliseconds.

As many participants in the AMP may be located in lower and middle income countries, particular consideration should be given towards having pages that are light and for which the latest version of browsers and/or the fastest connection is required.

3.8 Backups

All submissions received shall be stored and kept safe. Daily backup of all submission data (including uploads and attachments) is required, and the backup data should be stored in a different physical location than the live data.

Daily back-ups have a duration of 7 days. Every 7 days, a weekly back-up is done with a duration of 1 month. Every month, a monthly back-up is done with a duration of 12 months.

3.9 Information to gather

The online form shall gather all information required for the mentoring and links to other systems. IAS will specify what data should be gathered and in which format it should be stored.

3.10 Hosting and maintenance

The supplier shall host and maintain the AMP submission pages and systems. The supplier may outsource the hosting and maintenance to a third party after approval by IAS.

3.11 System availability

The supplier shall guarantee system accessibility (system uptime) on an annual average of 99.7%. Excluded from this guarantee are planned interruptions that have been approved by IAS in advance.

In any case, service interruption that has not been planned with IAS and lasts more than two hours entails hourly financial penalties.

3.12 Response to failures

The response time to system failures should be less than one hour in the standard case for the entire submission period, during working days from 09:00 to 18:00 (Central European Time).

The response time to in-house failures should be less than four hours in the standard case for the entire submission period outside of office hours.

Close to deadlines (not standard case) the response time to in-house failures should be less than one hour outside of office hours.

3.13 Usability

The online submission systems shall be easy to use and understand.

Clear technical instructions as well as submission guidelines should be available to guide the user through the system.

3.14 User experience

The user interface should be built using the latest release of [Bootstrap](#), currently v4.3.1, ensuring a seamless user experience across all major browsers and popular screen sizes. They must comply with standard design rules³.

3.15 Redundancy

Redundancy solutions should be in place for all systems (hardware and software) involved in the handling process.

This redundancy must be transparent and the user should not notice a case of system failure.

3.16 Security

To ensure maximum security of the data, the supplier shall put all possible technical means to secure the entire submission process, the database and the backups.

This applies to possible hack attempts, as well as hardware failures.

All communications and passwords must be encrypted. Databases cannot be directly accessible via Internet.

4 Mentor sign-up process

4.1 Mentor sign-up form

The mentor sign-up form is only available on the IAS profile platform, once the person is logged in. The form shall be designed to collect information regarding mentors publications and participation in previous AMP editions, and select track and categories of expertise. The sign-up form can only be submitted once. Acceptance,

³ As defined [here](#) for instance.

declination and request for more information should be administered from the back-office.

4.2 Mentor sign-up e-mail confirmation

An e-mail confirming the choices made shall automatically be sent to the person upon completion of the form.

4.3 Mentor sign-up status

The status of the mentor application shall be synchronized with IAS' CRM platform (ie. "pending", "rejected", "accepted", "more information requested").

4.4 Personalized AMP mentor section

The number, title, status and deadline of each allocated abstracts must be available for the corresponding mentors on the AMP should be synchronized with IAS' CRM platform.

5 Specific AMP system functions

The below indicated functions are not the complete technical specification but should at this stage be seen as minimum requirements which will be further specified by IAS. These are subject to change from one conference to another.

5.1 Validation code

In order to enter the AMP submission system for the first time, participants must Log in the profile platform and enter a code obtained upon completion of the abstract writing course. The AMP submission platform should offer this functionality to check the code obtained.

5.2 Drafts

The system shall provide possibility for AMP participants submitting an abstract to start submissions in draft form and then log in to the system at a later stage to finalize the submission.

5.3 Tracks and track categories

For each submitted abstract, the submitter must select one track and at least one track subcategory (provided by IAS) which will allow the project manager to assign said abstract to a qualified mentor.

5.4 Maximum length of submission text and title

The form must enforce rules of maximum length for submission text, maximum length for the submission title and other information to be specified by IAS.

5.5 Submission confirmation

All submissions to the AMP shall be confirmed by an automatic emails response that summarize the data entered in the submission process. The contents of all those email shall be approved by IAS.

5.6 Tables and images

Tables and images must be allowed in submissions. Inclusion of tables and images shall count towards the maximum number of characters allowed. There must be a possibility of controlling the number of tables and images included in each submission. IAS shall specify a maximum number of characters.

5.7 Special characters

The submission title and text must allow scientific and special characters that are coded in such a way that they do not get “lost in translation” in the various steps of the submission process.

5.8 Validation of required fields

It shall not be possible to submit any online forms without completing all mandatory fields. Whenever it is possible all input values should be checked by the system. Error messages should be clear, consistent and follow IAS specifications.

5.9 Maximum number of submissions

One participant can only submit:

- One abstract, for two rounds of review
- Two abstracts, for one round of review each.

In total, there cannot be more than two submission per participant.

5.10 Submission withdrawal

Participants should be able to withdraw their submission before it is assigned to a mentor. Once the abstract is assigned to a mentor, the participant should not be able to withdraw the submission anymore, and this can only be done from the back-office.

5.11 Submission consultation

Abstracts submitted to the AMP should be synchronized in real time with IAS' CRM platform.

5.12 Feedback consultation

Once feedback is received, participants should be notified via email and this feedback should be synchronized with the CRM platform..

6 Abstract allocation process (back-office)

The process of abstract allocation to mentors is a manual one, as abstracts and feedback contents must be checked and allocation to mentors can be based on more information than merely expertise.

6.1 Allocation of abstracts to mentors

The IAS is responsible to manually allocate submissions to mentors based on the mentor's and abstract's track and categories of submission or expertise.

One abstract is allocated to one mentor through the back-office. For each abstract, only mentors in the relevant track can be assigned.

The staff member administering the AMP shall also be able to change the mentor for an abstract at any given point, regardless of the fact that feedback has been provided. If feedback was already provided and the mentor is changed, feedback is erased.

An email is sent automatically to the mentor once he/she is assigned an abstract.

6.2 Timeline of allocation and feedback

Time shall be recorded and available in the back-office for:

- Abstract submission
- Abstract assigned to a mentor
- Feedback submitted by the mentor
- Feedback sent back to the participant

6.3 Feedback content

Mentors must be able to provide feedback (text) on each of the four sections of an assigned abstract. In addition, mentors must be able to enter free text comments.

Mentors cannot submit feedback if all four sections are not complete. Mentors must be able to save a draft version of their feedback.

Once feedback is submitted and before it is sent back to the submitter, the system administrator must be able to enter/change feedback manually.

6.4 Reminder function

The system shall have a reminder function that will automatically notify via email mentors who have not submitted their review 24 hours before the deadline and on the day of the deadline.

6.5 Mentor evaluation

Once they received their feedback, participants are invited to rank the mentors' feedback via a dedicated webpage. Ranking consists of a score and comment and can only be provided once per feedback received.

Appendix 1 – Profile Technical Specification – Contact System

Summary

This document specifies the technical parts of the Profile's Contact system and tie together the various documents that make up the complete technical specification for the 23rd International AIDS Conference (AIDS 2020) and the 11th IAS Conference on HIV Science (IAS 2021).

General

1 Web API

The Web API implements new OData v4 protocol, an OASIS standard for building RESTful APIs over rich data sources.

2 Authentication

2.1 Scenarios

For online deployment scenarios, OAuth 2.0 authentication is used. To use Web API, first access token needs to be retrieved by OAuth process. After that every call to Web API needs to have this valid OAuth access token. Azure Active Directory Authentication Library (ADAL) is recommended authentication API for use with CRM Web API.

Documentation: <https://docs.microsoft.com/en-us/dynamics365/customer-engagement/developer/connect-customer-engagement-web-services-using-oauth>

Development environment: (those keys are likely to change)

API url: <https://iasocietytest.crm4.dynamics.com/api/data/v9.0>

Client ID: 6c872d6b-dcbe-452d-9169-30fd46ac1f8e

Secret: e2c1DFO4i6Bbcflhfflx3Uar1vgaBU+VQmNb579DYNk=

Production environment:

API url: TBC

Client ID: TBC

Secret: TBC

Example of authentication in C#:

```
string api = "https://xxxxxxxxxxxxxxxxxxxxx.crm4.dynamics.com/api/data/v9.0";
ServicePointManager.SecurityProtocol = SecurityProtocolType.Tls11 |
SecurityProtocolType.Tls12 | SecurityProtocolType.Tls;
AuthenticationParameters ap =
AuthenticationParameters.CreateFromResourceUrlAsync(new Uri(api)).Result;

var creds = new ClientCredential("client id", "secret");
```

```
AuthenticationContext authContext = new AuthenticationContext(ap.Authority);
var token = authContext.AcquireTokenAsync(ap.Resource,
creds).Result.AccessToken;
```

3 Querying data

Example of query in C# :

```
using (HttpClient httpClient = new HttpClient())
{
    httpClient.Timeout = new TimeSpan(0, 2, 0);
    httpClient.DefaultRequestHeaders.Authorization =
    new AuthenticationHeaderValue("Bearer", token);
    httpClient.DefaultRequestHeaders.Add("Prefer", "odata.include-annotations=\"*\");
    HttpResponseMessage response = await httpClient.GetAsync(api +
"/contacts(emailaddress1='john.smith@iasociety.org')?$select=ias_id,firstname,lastn
ame,ias_gender,birthdate,emailaddress1,telephone1,mobilephone&$expand=ias_co
untryofresidence($select=ias_isocodealpha2),ias_nationality($select=ias_isocodealp
ha2)");

    if (response.Content != null)
    {
        Debug.WriteLine(await response.Content.ReadAsStringAsync());
    }
}
```

Available properties of the contact:

Name	Schema name	Description
ID	ias_id	ID of the contact
First Name	firstname	First Name of the contact
Last Name	lastname	Last Name of the contact
Gender	ias_gender	Gender of the contact
Birthday	birthdate	Birthdate of the contact
Country of residence (ISO Code)	ias_countryofresidence/ias_isocodealpha2	Country of residence of the contact (ISO Code)
Nationality (ISO Code)	ias_nationality/ias_isocodealpha2	Nationality of the contact (ISO Code)
Email	emailaddress1	Email address of the contact
Phone Number	telephone1	Phone Number of the contact
Mobile phone	mobilephone	Mobile phone number of the contact

Example of return:

```
{
  "@odata.context":
  "https://xxxxxxxxxx.api.crm4.dynamics.com/api/data/v9.0/$metadata#contacts(ias_id,firstname,lastname,ias_gender,birthdate,emailaddress1,telephone1,mobilephone,ias_promotion_code,ias_countryofresidence(ias_isocodealpha2),ias_nationality(ias_isocodealpha2))/$entity",
  "@odata.etag": "W/11524759",
  "ias_id": "000026",
  "firstname": "John",
  "lastname": "Smith",
  "ias_gender": 1,
  "birthdate": "1986-12-25",
  "emailaddress1": "john.smith@iasociety.org",
  "telephone1": "0041227100800",
  "mobilephone": null,
  "contactid": "93075ec1-e656-e911-a95d-000d3ab64750",
  "ias_countryofresidence": {
    "@odata.etag": "W/3620806",
    "ias_isocodealpha2": "CH",
    "ias_countryid": "53cb4a88-d3ec-e811-a869-000d3ab53bae"
  },
  "ias_nationality": {
    "@odata.etag": "W/3620806",
    "ias_isocodealpha2": "CH",
    "ias_countryid": "53cb4a88-d3ec-e811-a869-000d3ab53bae"
  }
}
```

Appendix 2 – Profile Technical Specification – AMP System

Summary

This document is meant to specify the technical parts of the Profile's AMP system and tie together the various documents that make up the complete technical specification for the 23rd International AIDS Conference (AIDS 2020) and the 11th IAS Conference on HIV Science (IAS 2021).

1 Introduction

1.1 Profile Portal

The IAS Conference Profile Project has as overall objective to maintain a single point of entry for all IAS conference's subsystems. The user has an overview page where all available subsystems can be found and his personal status for the different systems.

2 System Overview

2.1 Profile System

2.1.1 Web interface

The web interface consists of two major parts

1. Sign in/Sign up page.
2. Overview page. This page contains links to all subsystems.

2.1.2 Profile Database

The Profile System is a CMS platform connected to our CRM Dynamics 365 platform

The subsystems providers keep their version of the different profile data and may copy data from the Profile System. The user should however only be allowed to modify his personal data from the Profile. All personal information displayed in the subsystems should be read-only.

2.2 AMP System

The AMP System works independently from the profile portal.

Once all mandatory data have been filled, the user can then access the remote AMP System using specific links on the profile portal.

User data feeding the AMP system comes anyway from the profile system.

Please see 4.2.1 Profile System ↔ AMP System for details of the communication.

3 Architecture

3.1 Software

External subsystems may use any preferred software platform as long as they can communicate via HTTPS and REST Web Services (JSON format).

4 Communication

4.1 General

All communications between the Profile System and the external subsystems handling data transfer will be done using REST Web Service's architecture and JSON formatting.

4.2 Points of interaction

The following lists show the events where communication between Profile System and external subsystems needs to take place.

4.2.1 Profile System ↔ AMP System

- Profile System passes user's email to AMP System.
(When user clicks the link to access the external system.)
- AMP System pull user's data from our CRM platform.
- AMP System push change with the CRM platform according to IAS specifications

4.3 Profile checksum

When the user browses from the Profile to an external subsystem, the delegate email address is sent as a parameter in the URL. To prevent the user manipulations a hashed key has been added to the URL.

This checksum is calculated using the 128-bit MD5 hash algorithm (see References) on the delegate email address, the subsystem ID, and a "secret" hash keyword as follows:

MD5(SubsystemID + HASH_KEYWORD + email) = checksum

The checksum for the AMP System (ID 4) and the delegate email address (john.smith@iasociety.org) would be calculated as:

MD5("4TBCjohn.smith@iasociety.org") → "TBC"

SubsystemID	Name
4	AMP System

Hash Keyword
TBC

4.4 Data structures

4.4.1 Submitter data

The procedure to get user's data is defined in "Profile WebService - Contacts.pdf" attached.

4.5 Web Service Specification

Users' Contact System: (cf. Profile WebService - Contacts.pdf)

API url : TBC

Production Profile Portal: <https://profile.aids2020.org/>

5 References

5.1 MD5

This web site contains information about the MD5 hash algorithm and links to implementations in different programming languages.

http://en.wikipedia.org/wiki/Md5#MD5_hashes