

# Certain EventStream – Quick Guide

This document is a brief guide to installing and using **Certain EventStream**. This native application sits in **Oracle Eloqua**, and enables you to manage all of your events and event campaigns from within your instance of Oracle Eloqua.

 **Videos:** To watch the EventStream training videos in Certain University, go to  Help and Support > Support > Certain University > [EventStream Course](#).

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## Prerequisites

Before installing EventStream:

1. You are an Oracle Eloqua customer.
2. You have purchased EventStream as part of your Certain bundle.
3. You have given Certain your Eloqua ‘Client Name’.
4. Certain enables EventStream in your Certain account, and makes it possible for you to download the app.
5. (For sub-accounts, an administrator can then enable EventStream by going to Account Settings > Implementation > Products > Integration, and selecting **EventStream Module**.)
6. Certain gives you the **Installation URL** from which you install EventStream in your instance of Eloqua. The URL is in a format like this:  
<https://login.eloqua.com/Apps/Cloud/Admin/Catalog/Add/.....>

Before using EventStream

7. Set up one or more Event Templates in your Certain account, if it doesn’t already have any.

## Installation

### Setting Up an Eloqua User

When you configure EventStream in the steps below, you'll specify one Eloqua User to be the EventStream user. (See step 7, **Eloqua Setup**, under **Configuring EventStream** on page 3 below.)

**Recommended:** Although you could select any existing Eloqua user, we recommend setting up a *separate* Eloqua user for this purpose. This will make obvious the source of Eloqua records coming from Certain.

For example, in setting that user up in Eloqua, you could make the First Name "Certain", and the Last Name "Integration".

**Password:** We also recommend setting that user's password to not expire.

**Security Group:** Ideally select "**Custom Administrator**", to ensure sufficient permissions. If you use custom security groups you should ask Certain for assistance.

### Setting Up a Certain User

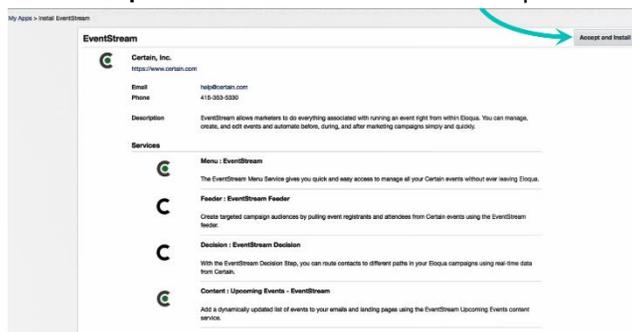
In the steps below you'll specify the Certain user to connect with EventStream. (See step 6, **Certain Setup**, under **Configuring EventStream** below.)

This user *must* have **API Access**. An administrator sets that for a user on Account Settings > Administration > Users.

### Installing EventStream in Eloqua

You only need to do this once.

1. Log in to Eloqua as the user you have set up to be your EventStream user.
2. In the same browser, go to the installation URL that Certain has given you: see [prerequisite 6](#) above.
3. Click **Accept and Install** in the window that opens. That installs EventStream.

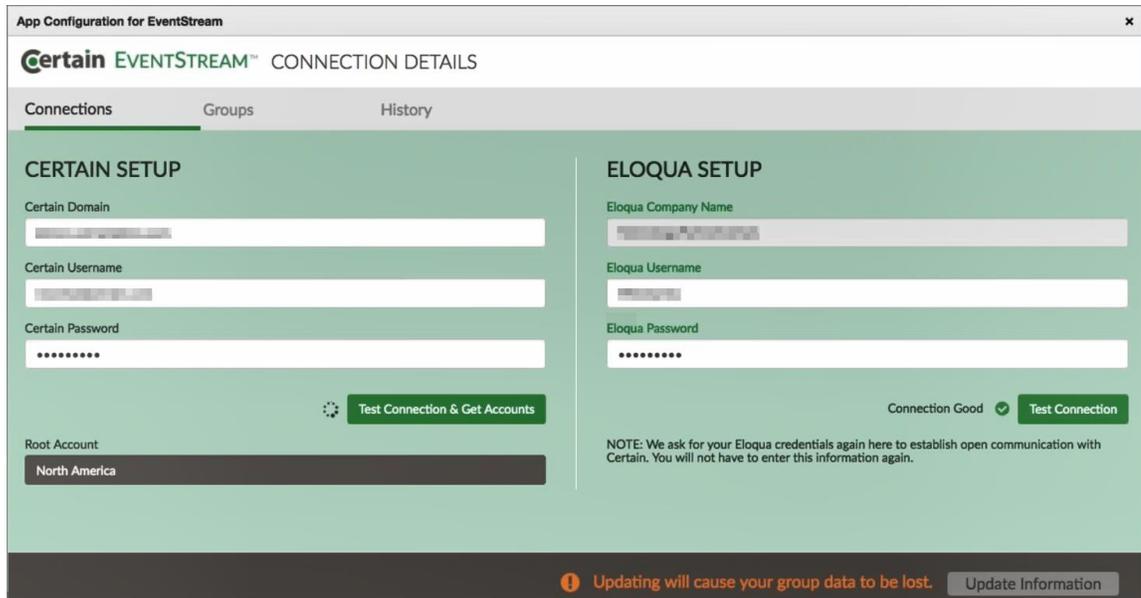


4. You can now configure EventStream, as described next.

### Configuring EventStream

1. In Eloqua, click the gear icon  to go to the administration area.
2. There, under **Platform Extensions**, click **Apps** to go to the **App Cloud Catalog**.

3. Click **EventStream** in your list of installed apps.
4. Click the  gear icon (at upper right) to go to the admin page. You'll be on the first tab, "**Connections**", which has two columns: "**Certain Setup**" on the left, and "**Eloqua Setup**" on the right.



5. Enter the details as follows:

## 6. **Certain Setup**

- **Certain Domain** – The domain via which you access Certain, *without* the https:\\ prefix.  
*Examples:* "app.certain.com" or "events.yourcompany.com"
- **Certain Username** – This user's permissions must include API access.
- **Certain Password** – That user's password.

Click **Test Connection & Get Accounts**.

The list of accounts displayed is all those to which the specified Certain user has access; that is, their "root account" and all its sub-accounts (if any).

If you want to restrict access to just one account, select it here.

## 7. **Eloqua Setup**

- Eloqua Company Name
- Eloqua Username
- Eloqua Password

Click **Test Connection**.

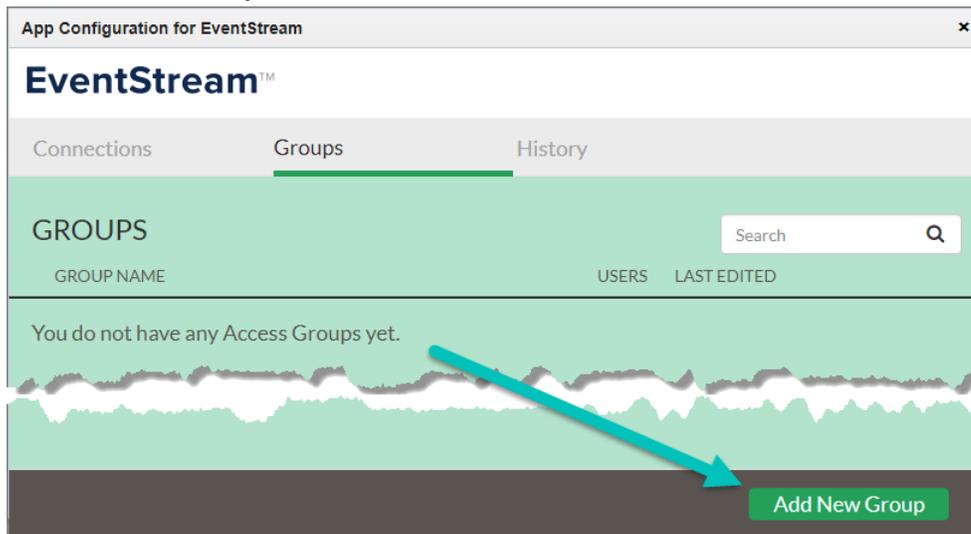
8. Click **Complete Installation**

## Adding Access Groups

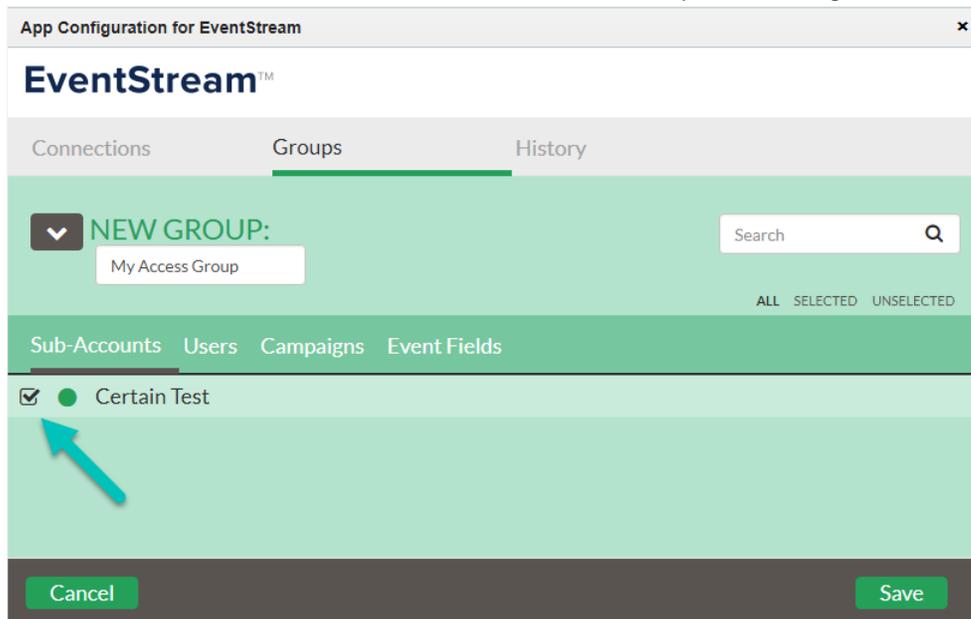
Once you've created the connection, you need to add access groups.

Click the **Groups** tab on the **EventStream** configuration page. (AppCloud Catalog > EventStream > ⚙️.)

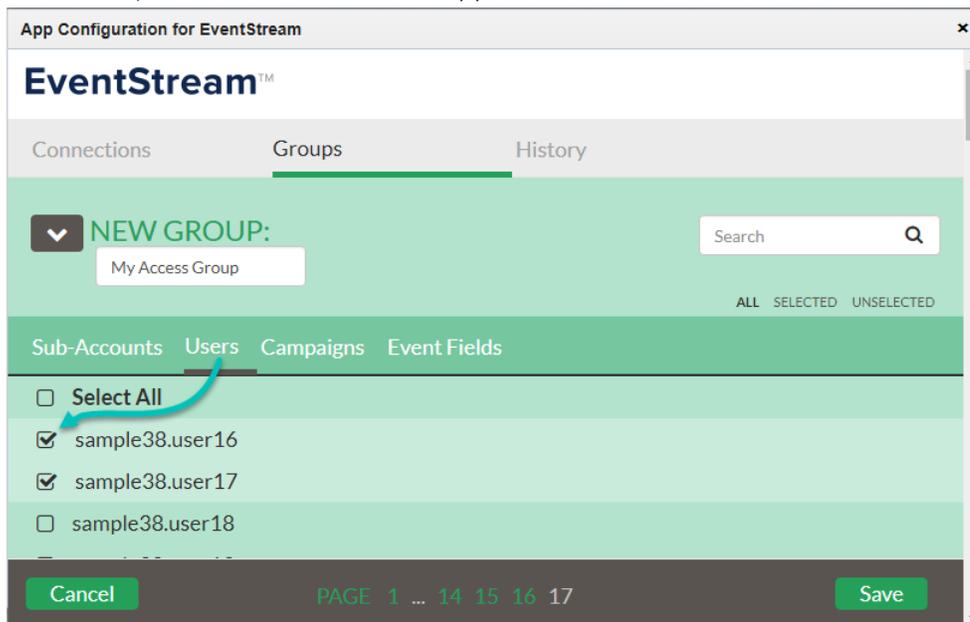
1. Click **Add New Group**.



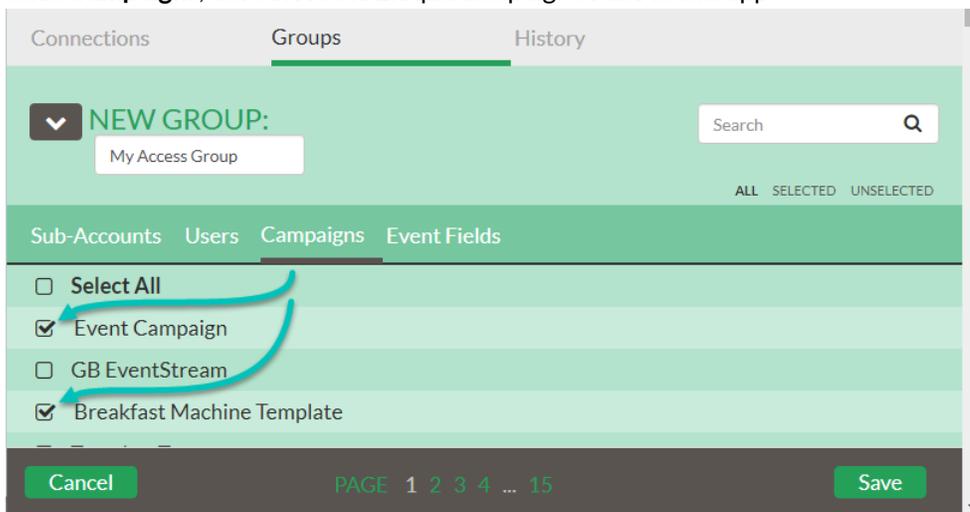
2. Name your access group. This is "My Access Group" in the example below.
3. Click **Sub-Accounts**, and select the Certain sub-account(s) you'll be using.



- Click **Users**, and select the Certain user(s) to have access.



- Click **Campaigns**, and select the Eloqua campaign to use in this app.



- Click **Event Fields**, and select the event fields to use.  
You can also rename any of them by changing the **Title**, and choose whether they are **Required** or **Read-Only**.
- If you haven't already entered the **Name** of the new group, as we did in step 2, do so now, and **Save**.

The list of groups now includes that new group. You can click the pencil icon to edit it, or the black cross to delete it.

Your Eloqua user is now able to use the Event Stream app, as described below.

## Using EventStream

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### Opening EventStream

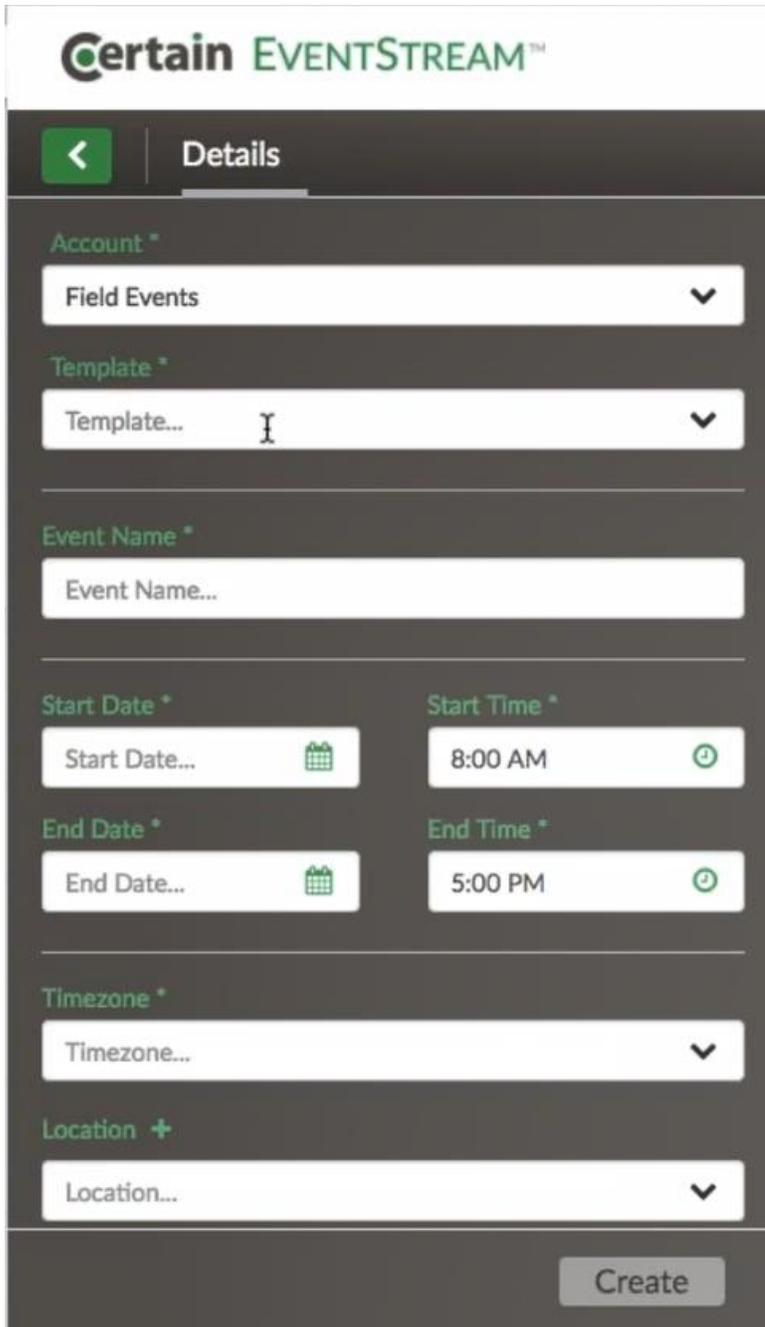
To open EventStream:

1. In Eloqua, click the **cloud menu** icon  , which floats in the upper right corner of many pages.
2. Click **EventStream** in the list of apps installed in your instance of Eloqua.
3. The default account is selected.
4. To work in a different sub-account, select it in the list.

## Creating an Event

To create an event in Eloqua:

1. Open EventStream.
2. Select the account to create the event in.
3. Click **Create Event**.
4. The **Details** panel opens



The screenshot shows the 'Details' panel in the Certain EventStream application. At the top, there is a back arrow and the title 'Details'. Below this, the form contains several fields:

- Account \***: A dropdown menu with 'Field Events' selected.
- Template \***: A dropdown menu with 'Template...' selected.
- Event Name \***: A text input field with 'Event Name...' as a placeholder.
- Start Date \***: A date picker with a calendar icon, showing 'Start Date...'.
- Start Time \***: A time picker with a clock icon, showing '8:00 AM'.
- End Date \***: A date picker with a calendar icon, showing 'End Date...'.
- End Time \***: A time picker with a clock icon, showing '5:00 PM'.
- Timezone \***: A dropdown menu with 'Timezone...' selected.
- Location +**: A dropdown menu with 'Location...' selected.

At the bottom right of the form is a 'Create' button.

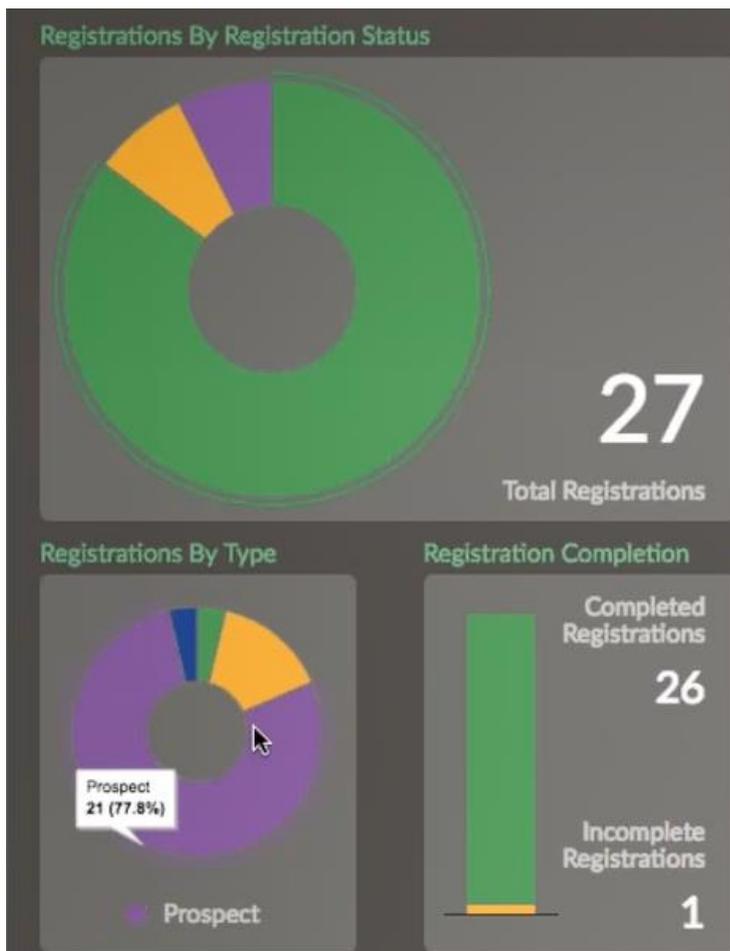
5. Select the event **Template** to use. (The list is determined by the sub-account selected.)  

**Note:** Template events must therefore already be set up in Certain.
6. Select or enter details in the fields shown, where most selections are type-ahead.  
(**Note:** When you are editing an event rather than creating one, these are *live* fields from Certain: if you edit them here, they are updated in Certain, and vice versa.)
  - a. **Event Name**
  - b. **Start Date and Time**
  - c. **End Date and Time**
  - d. **Time Zone**
  - e. **Description.**  
This is not only for internal use. You can use it in Eloqua emails, for example.  
*Note:* You can use HTML tags in the text.
  - f. **Location**  
**Note:** You can select or add a location. This is at the *account* level in Certain, so if you edit details here they apply to *all* Certain events in the same account that use that Location.
7. Click **Create**.
8. Additional fields are shown, depending on the template selected, with values prefilled based on the event template.  
*Example:* the Registration Form URL, which you might want to copy.

## Using the Status Page

To see information about an event you've created in EventStream:

1. Open EventStream.
2. Select the sub-account, if the event isn't in the default account.
3. Select the event.  
(You can **Search** for the event to save scrolling through a long list.)
4. Click the **Status** tab.
5. You see the following Pie charts. Hover over a segment for details (such as number and percentage).
  - a. Registrations by Registration Status.
  - b. Registrations by Attendee Type.
  - c. Registration Completion (number "Complete" vs. "Incomplete").



## Launching a Campaign

**Note:** You first need to have configured campaigns to be used for EventStream. For example:

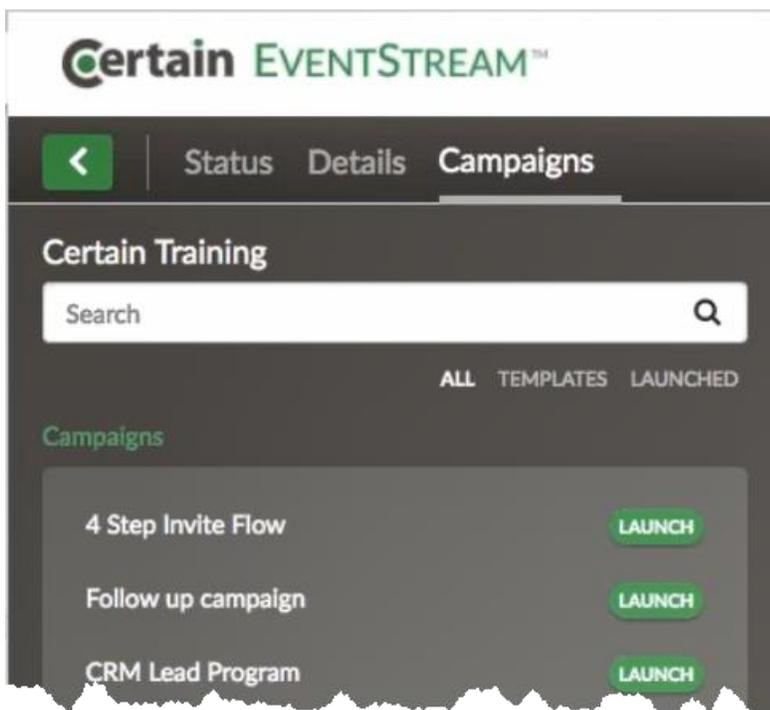
- “Four-Step Invite Flow”
- “Follow Up Campaign”
- etc.

See page 11 for how to use the **EventStream Feeder** and **EventStream Decision** elements in your campaigns.

EventStream makes it possible to launch Eloqua campaigns for events you’ve created in EventStream.

To take advantage of this major benefit:

1. Open EventStream.
2. Select the sub-account, if the event isn’t in the default account.  
(You can **Search** for the event to save scrolling through a long list)
3. Select the event.
4. Click the **Campaigns** tab.
5. Click **Launch** next to the Campaign to launch.



## Using EventStream Decision and Feeder Elements

EventStream adds two elements you can use as steps in your campaigns:

- EventStream **Feeder**
- EventStream **Decision**

### EventStream Feeder



An **EventStream Feeder** pulls registrants' records from Certain and loads them into Eloqua. This creates new contacts if they don't already exist in Eloqua, and updates any that do. They are then part of the flow of this campaign.

*Note:* This does *not* require the Connectors module in Certain, it's completely independent of that.

To configure an **EventStream Feeder** element:

1. Add an **EventStream Feeder** to a campaign canvas
2. Give the step a **Name** and click the pencil icon to configure it.
3. Edit the fields as necessary:
  - a. Sub-Account
  - b. Event
  - c. Registration Status
  - d. Attendee Type  
(*Note:* You *must* enter a Status or a Type, but you *can* enter both.)
  - e. Check Frequency
4. Click **Save**

The **History** button displays the history of this feeder. You can search within a date range, and restrict the records to successes or errors.

For each one it shows you the Date, Status, Records, and Details.

### EventStream Decision

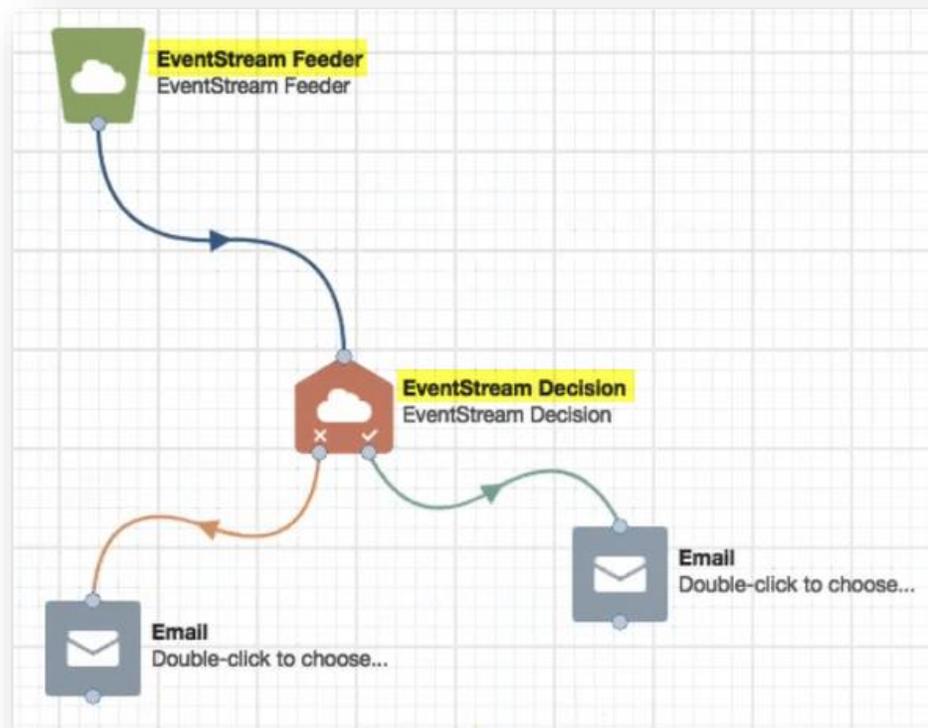


An **EventStream Decision** element enables you to route contacts to different paths in your Eloqua campaigns using real-time data from Certain.

To configure one:

1. Add an **EventStream Decision** to a campaign canvas.
2. Give the Step a **Name** and click the pencil icon to configure it.
3. Edit the fields as necessary. These are the same as for the EventStream Feeder, but with Path instead of Check Frequency.
  - a. Sub-Account
  - b. Event
  - c. Registration Status
  - d. Attendee Type  
(As for the feeder, you *must* enter a Status or a Type, but you *can* enter both.)
  - e. **Path:** Select **Yes** or **No**.

4. Click **Save**.

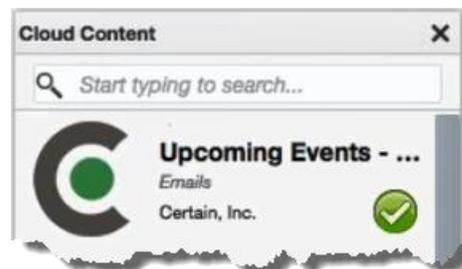


Campaign Canvas

## Using the “Upcoming Events” Content Element

To insert a dynamic list of upcoming events from Certain into an Eloqua email or landing page:

1. Open the email or landing page in Eloqua.
2. Click **Cloud Content** on the left.
  - a. Choose the Sub-Account
  - b. Choose how many events to include



The email or landing page will include that number of upcoming events from Certain, listed in date order.