

Connectors (including Eloqua Jobs)

This document is an introduction to the two **Connectors** pages in Certain, and the “Jobs” you run on them (which are described in general overleaf, on page 3).

It describes Certain’s pre-built jobs for connecting to the Eloqua marketing platform, which are provided as working examples for more advanced integrations.

See page 3 for details of those jobs.

The two **Connectors** pages (see page 6) are:

- **(Event) > Plan > Configure > Connectors** – *event-level* jobs, for Administrators and Event Builders
-   **Account Settings > Implementation > Connectors** – *account-level* jobs (Administrators only)



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Initial One-Off Setup (by Administrator)

In your account, Certain needs to have enabled **Eloqua** integration.

If you are using a sub-account, your Administrator needs to do the same:

1. Go to **Account Settings > Implementation > Products > Integration**
2. Select **Eloqua**

In the account (and/or sub-account), your administrator needs to set up the **Eloqua Plugin**, as described below.

NOTE: Before doing this, your administrator must contact Eloqua support for these two things:

- A. Request that the REST API be enabled on your Eloqua account.
- B. Confirm what the STANDARD REST API URL is for your Eloqua account.
(Example: <https://secure.eloqua.com/API/REST/1.0>)
This is necessary in step 6 below.

To configure the Eloqua plugin in Certain

1. Go to **Account Settings > Implementation > Products > Plugins**
2. Click **Add New**, and complete the following details for the new plugin:
3. **Third-party Account** – select “**Eloqua**”.
4. **UserID** – Enter your UserID in this format: **SiteName\username** (e.g. *Certain\John.Smith*)
5. **Password** – Enter the password associated with your Eloqua UserID.
6. **REST API URL** – Enter the STANDARD Eloqua REST API URL provided to you by Eloqua.
If you do not know this, contact Eloqua support. Examples:
<https://secure.eloqua.com/API/REST/1.0>, or <https://secure.p03.eloqua.com/API/REST/1.0>, etc.
7. **Certain Profile to Eloqua Contact Field Mapping** – Select which Profile fields in Certain map to which Contact fields in Eloqua. These will be used by integration jobs that add or update records in Certain based on data in Eloqua, or vice versa, as described in this guide.

A number of default mappings are provided. To edit one, select the relevant field in the drop-down lists of **Certain Profile Fields** and **Eloqua Contact Fields**.

To add a new mapping, click **Map a new field** and select a field in each of the two drop-down lists.

See **Caution** overleaf.

Caution: Once you have saved your field mappings:

If you need to change any of the credentials, such as **UserID**, save the new credentials first, and then map the fields again.

Otherwise your custom field mappings would be overridden by the original defaults.

Tip: After saving, edit the plugin. If the Certain to Eloqua field mappings are not displayed then there is an issue with your credentials; confirm your credentials are valid and then start over.

Jobs

What are Jobs?

Each "job" is a pre-defined program, developed using the Certain API, to connect to a target application – Eloqua is the target application in this document. A job runs in the background as a batch job, drawing data from that application into Certain, and/or sending data from Certain to that application.

A job which is an update to Certain includes the definition of the extraction from the target application, the mapping of fields in the target application to equivalent fields in Certain (configured in the plugin described on page 1), the logic involved, and the addition or update of data in Certain.

Vice versa, a job which is an update of the target application *from* Certain, still includes pre-configured field mappings and logic, and pushes data to the other application.

Each time you run a job, you choose whether to do so just the once, or on a recurring basis. If the latter, you have a lot of flexibility about when and at what frequency the job runs. For example, you might run an Import job from Eloqua into Certain once several months before an event in order to send out invitations to those people; and you might run outbound jobs from Certain to Eloqua regularly, starting after registration begins and ending after the event is over.

What Eloqua Jobs can I run?

Job	Level	Run from
1. Import Eloqua Contacts as Profiles	Account	Account Settings > Implementation > Connectors
2. Import Eloqua Contacts as Registrations	Event	Plan > Configure > Connectors
3. Update Eloqua Contact List	Event	Plan > Configure > Connectors
4. Create or Update Contacts in Eloqua	Event	Plan > Configure > Connectors
5. Upload Engagement Metrics to Eloqua	Event	Plan > Configure > Connectors
6. Upload Interest Metrics to Eloqua	Event	Plan > Configure > Connectors
7. Create Eloqua Activity upon Session Status Change	Event	Plan > Configure > Connectors
8. Create Eloqua Activity upon Reg Status Change	Event	Plan > Configure > Connectors
9. Create Eloqua Activity upon Agenda Item Status Change	Event	Plan > Configure > Connectors

What do these jobs do?

1. Import Eloqua Contacts as Profiles

This job enables you to specify a static list of contacts in Eloqua and import those contacts into Certain as profile records.

2. Import Eloqua Contacts as Registrations

This job enables you to specify a static list of contacts in Eloqua and import those contacts into Certain as registrations and profile records. If a Certain profile does not exist for a lead (based on email address or Eloqua ID), then a new profile is created. If a Certain profile *does* already exist for a lead (based on email address or Eloqua ID), then the registration is associated with that profile.

3. Update Eloqua Contact List

This job enables you to specify the prefix for the name of an Eloqua Contact List to be created (if it doesn't already exist), and add contacts into that list upon the change of a registration status in Certain (from *Invited* to *Pre-Registered*, for example).

The **Contact List Name** that you enter will be appended with the Certain account code and event code. The first time you run the job using that Contact List Name, it will create the Contact List in Eloqua.

For example: *Pre-Registered_MKTG_CPUG2018*

In this example,

- “*Pre-Registered*” is the **Eloqua Contact List Name** that you've provided,



The image shows a screenshot of a form with two input fields. The first field is labeled 'Eloqua Contact List Name' and is empty. The second field is labeled 'Pre-Registered' and contains the text 'Pre-Registered'.

- “*MKTG*” is the **Account Code** of the Certain account you are in, and
- “*CPUG2018*” is the **Event Code** of the event in which you are running the job.

Once this list has been created (by the job when it is first run), if you want to append additional contacts to it, you run the same job and again enter just “*Pre-Registered*” as the **Eloqua Contact List Name** to update. Since the Account Code and Event Code are appended to that name each time the job is submitted, the job will again update the *Pre-Registered_MKTG_CPUG2018* Contact List in Eloqua.

What unique identifiers are used to trigger a campaign in Eloqua?

When a contact is imported from Eloqua, the **Eloqua ID** is placed in the Certain **External Profile ID** field and the **Source of Profile** is set to *Eloqua*.

For the **Update Eloqua Contact List** job to work, both of those fields must be populated correctly. Therefore, all of those leads must originate from Eloqua via the **Import Eloqua Contacts as Profiles** job (see page 4), the **Import Eloqua Contacts as Registrations** job (page 4), or the **Create or Update Contacts in Eloqua** job (described next).

4. Create or Update Contacts in Eloqua

This job enables you to create new Eloqua contacts, and update existing ones (matched on email address), from event registrations of specified statuses. Any blank fields in Certain do not affect the equivalent fields in Eloqua, since blank fields are not sent to Eloqua.

The job also updates the profile in Certain, setting its **External Profile ID** to the **Eloqua ID**, and its **Source of Profile** to “Eloqua”; the Update Eloqua Contact List job can therefore include registrations for these profiles.

5. Upload Engagement Metrics to Eloqua

This job enables you to upload numbers and average ratings of attendees' sessions and appointments from Certain to Eloqua, where they inform behavioral scoring.

Several of the statistics require particular modules to be enabled for the event in Certain. For example, whilst the numbers of sessions registered and attended are always uploaded, such numbers for appointments require the Appointments module to be enabled, and average ratings (for sessions and appointments) require the Event Views and or Certain Mobile modules. For full details, please see the separate guide to **Interest and Engagement Metrics with Certain and Eloqua**.

6. Upload Interest Metrics to Eloqua

This job enables you to upload interest-based metrics per account-level tag assigned to agenda items for which the attendee is registered in the event, using the numbers of points assigned to the agenda items. This is explained in more detail in the separate guide to **Interest and Engagement Metrics with Certain and Eloqua**.

7. Create Eloqua Activity upon Session Status Change

8. Create Eloqua Activity upon Reg Status Change

9. Create Eloqua Activity upon Agenda Item Status Change

These three jobs create external activities in Eloqua when attendees' registrations for the event or for the selected sessions or agenda items change status to one of the statuses you select.

Two Connectors Pages

There are two **Connectors** pages in Certain: one at the account level, and one at the event level, as described below.

1. **(Event) > Plan > Configure > Connectors** – The *event-level* page, for Administrators and Event Builders.
2. **Account Settings > Implementation > Connectors** – The *account-level* page, for Administrators only.

When you go to either of them, you see a list of the jobs at that level. You can add new jobs (see below, page 7), see more details of existing jobs (page 10), or remove jobs from the list (page 10).

At the event level

To see a list of all jobs in the current *event*, go to:

- **(Event) > Plan > Configure > Connectors**. (This is available to Event Builders and Administrators.)

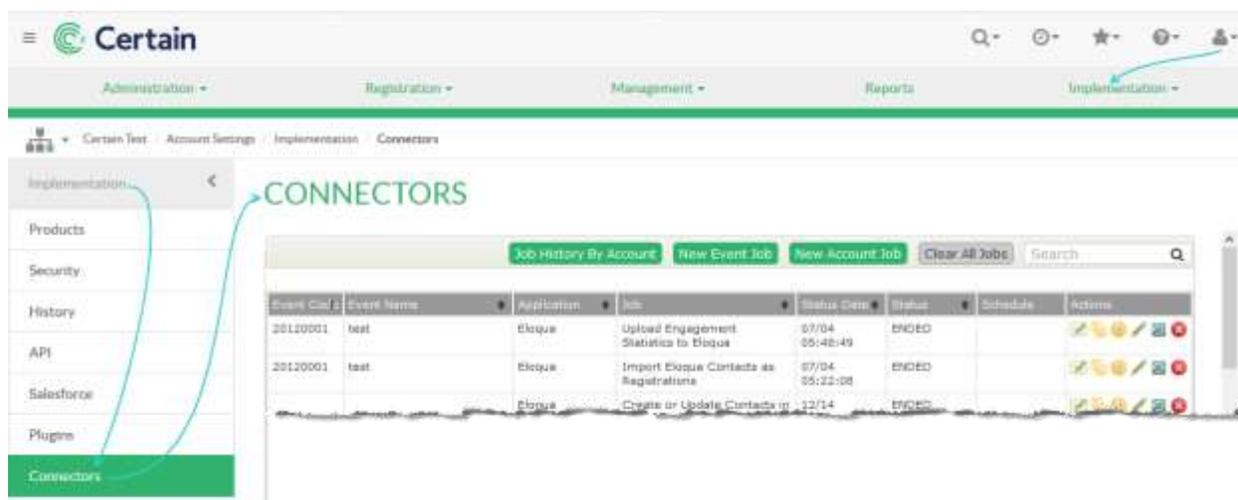
For more about this page, see the account-level screen page described next, since they have so much in common. And the use of the **New Event Job** button is described in the following section, “Running a Job” on the next page (page 7).



At the account level

To see a list of all jobs in the current *account*, go to:

- **Account Settings > Implementation > Connectors**. (This is only available to Administrators.)



The information shown about each job is the same in both pages: the **Event**, the target **Application**, the **Job** description, the **Date** its **Status** last changed, its current **Status**, and the nature of its **Schedule** (if any – see **Scheduling a Recurring Job** on page 9).

In addition, there is an **Actions** column: see page 10 for details of the actions you can take on a job.

Above the list of jobs are some buttons: including one or two to run a **New...Job** (see the next section, “Running a Job”) and one to **Clear All Jobs** (which removes the “Terminated” jobs from the list).

Running a Job

You run a job from the relevant **Connectors** page, depending on whether it is an event-level or account-level job, and whether you are an Event Builder or an Administrator.

1. To run an *event-level* job (especially as an Event Builder):
 - a. In that event, go to **Plan > Configure > Connectors**
 - b. Click **New Event Job**
2. To run an *account-level* job:
 - a. As an administrator, go to **Account Settings > Implementation > Connectors**
 - b. Click **New Account Job**
3. To run an *event-level* job (as an Administrator) from the account page:
 - a. As an administrator, go to **Account Settings > Implementation > Connectors**
 - b. Click **New Event Job**
 - c. You see a list of the account’s events.
 - d. If the list is long, you can filter it by typing any part of a name in **Filter Events by Name**.
 - e. Select the event in which to run the job, and click **Next**.

In each case, the **New Job Configuration** section is displayed, as illustrated and described next. The only difference is which jobs are available to be run. (See the list on page 3.)

New Job Configuration

Enter the details in the **New Job Configuration** section, illustrated below, and click **Submit Job**.

New Job Configuration for Eloqua Test_Session

Application*	<input type="text" value="Eloqua"/>
Job Name*	<input type="text" value="Import Eloqua Contacts as Registrations"/>
Job Description*	<input type="text" value="Import Eloqua Contacts as Registrations"/>
Profile Entry Deduplication*	<input type="radio"/> Create or update profiles - use email address as unique identifier <input type="radio"/> Create or update profiles - use Eloqua ID/External Profile ID as unique identifier
Attendee Type Code*	<input type="text" value="-- Select Option --"/>
Registration Status*	<input type="text" value="-- Select Option --"/>
Registration Status overwrite*	<input type="radio"/> Change above selected registration status for existing registrations <input type="radio"/> Do not change above selected registration status for existing registrations
Eloqua List Name Containing Contacts*	<input type="text"/>
Eloqua Retrieval Page Size*	<input type="text" value="1000"/>
Eloqua Starting Page*	<input type="text" value="1"/>
Eloqua Ending Page*	<input type="text" value="2"/>
Email for Job Notifications	<input type="text"/>
<input checked="" type="radio"/> Run Once <input type="radio"/> Schedule Recurring Job	

Note that the actual fields displayed depend upon the **Application** and **Job** selected, so any screenshots and descriptions here are only indicative examples.

The example above is for an event-level job that imports contacts from Eloqua, adding them as registrations in Certain.

When you are submitting a job, some of the fields always present, but most are specific to the selected job, such as in the screenshot above and described below.

For all Jobs:

- **Application** – Select **Eloqua** as the target application.
- **Job Name** – Select the job to be submitted. (The jobs available are those specific to the **Application** selected, as listed for Eloqua on page 3.)
- **Job Description** – Enter a description, to be seen in the list of jobs. The initial default value is the name of the job.
- **Email for Job Notifications** – If the job fails, details will be emailed to this address

Job-specific fields:

Each job has a number of fields specific to it. If they're not self-explanatory, see details in the online help for that page. For example, for the job illustrated above:

- **Profile Entry Deduplication** – Select an option to determine how potential duplicate profile records are to be identified and handled.
- **Eloqua List Name Containing Contacts** – Enter the exact name of the Static List in Eloqua containing the contacts you'd like to import.
NOTE: The list name should not contain any spaces; if it does, the list will not be found.
- **Eloqua Retrieval Page Size** – We recommend leaving this at the default value of **1000**, which is the maximum value allowed by Eloqua
- **Eloqua Starting Page** – We recommend leaving this at the default value of **1**.
- **Eloqua Ending Page** – We recommend leaving this at the default value of **2**.
- **Attendee Type Code and Registration Status** – Select the Attendee Type and Registration Status to be used for the registrations created by the import.

For all jobs:

- **Run Once** – If selected (as in the screenshot), the job is run when you click **Submit**.
- **Schedule Recurring Job** – If this is selected instead of **Run Once**, additional fields are displayed: see **Scheduling a Recurring Job** below for details.

Note that in the present implementation, nearly *all* fields are required.

Click **Submit Job** to submit your job. It is then included in the list of jobs.

Scheduling a Recurring Job

If you select the **Schedule Recurring Job** radio button, instead of **Run Once**, then additional fields are displayed, as explained below (for event-level jobs).

First Run Date and Last Run Date – Define the period for which the job should run.

For each of those two, select one of the four options:

- **Event Start Date** – Select + or -, and enter the number of days.
Example:
 - Your event's **Start Date** is June 1
 - You select "-" and enter "3"
 - The job will first run or last run on May 29; that is, three days before the event starts.
- **Event End Date** – Select + or -, and enter the number of days.
Example:
 - Your event's **End Date** is June 3

- You select "+" and enter "7"
- The job will first run or last run on June 10; that is, seven days after the event ends.
- **Job Create Date** – Enter the number of days. The job will first run that number of days after the date you create the job.
Example:
 - You create the job on May 30, and accept the default of "0" (days)
 - The job will first run on May 30
- **Fixed Date** – Click the text box to select the date from the calendar that's displayed. The job will first

run or last run on that date.

You can then select the frequency at which the job must run: **Every ... hour, day, week, or month:**

And based on that choice you provide more detail about when the job must run:

- For **Every hour**: the number of minutes past the hour (00 to 59).
- For **Every day**: the time at which to run the job.
- For **Every week**: the day of the week (Sunday to Monday), and the time on that day.
- For **Every month**: the day of the month (1st–31st), and the time on that day.

Actions

The **Actions** column in the list of jobs on the **Connectors** page includes the following icons for each job.

-  – View the job's event log. ("Event" here is a technical term, referring to the things that happen during the execution of a job.)
-  – View the job's messages
-  – View the job's errors if it failed
(*Note:* When a job fails, the same details are emailed to that job's **Email for Job Notifications.**)
-  – Edit the job
-  – Check the job's history. (The history opens in a new browser window.)
For example, the history of "Create or Update Contacts in Eloqua" job would list the contacts created and those updated.
-  – Remove the job from the queue (even if it is running!), and delete it from the list.