BrightTALK Reporting: Eloqua Connector

User Guide

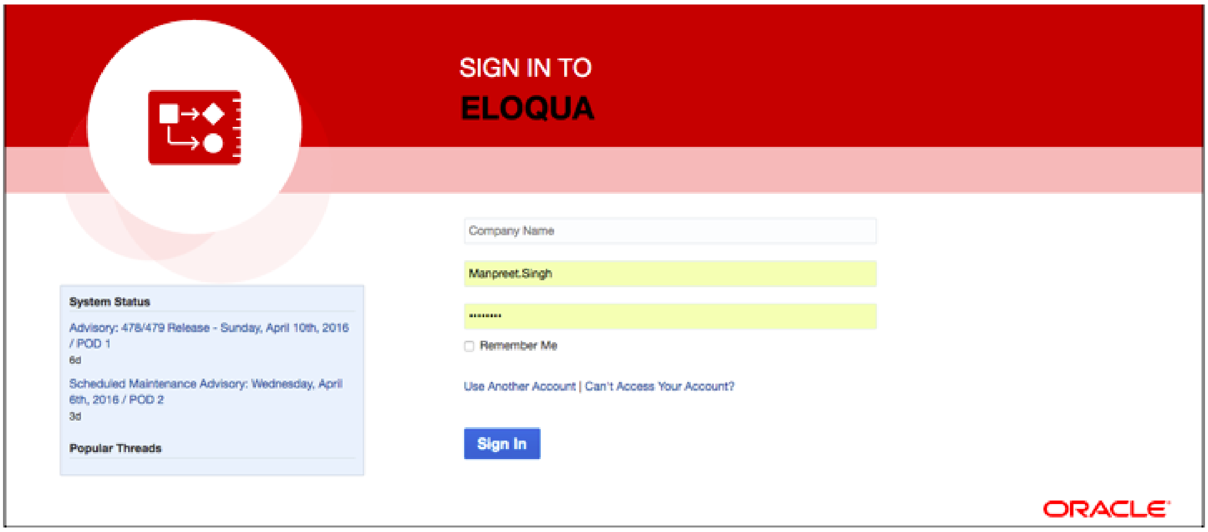
Overview

The BrightTALK Eloqua connector makes it easy to optimize sales and marketing performance by transferring the registration and engagement data from your BrightTALK Channel(s) to your records in Eloqua. Enable your sales team to respond rapidly to the buying behaviors of your audience and close business faster.

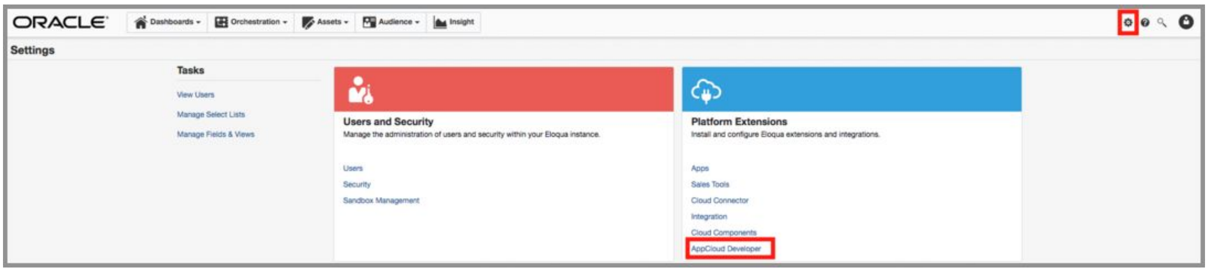
Eloqua Setup

The BrightTALK Eloqua connector communicates with Eloqua using the Eloqua API. The API is authenticated and authorized using a Eloqua **Client ID** and **Secret**. To acquire your **Client ID** you will need to create a new Eloqua App. The following steps will take you through the process of creating your Eloqua App.

1. Within your web browser, **navigate to**: https://login.eloqua.com/ and **sign in** to your Eloqua account.

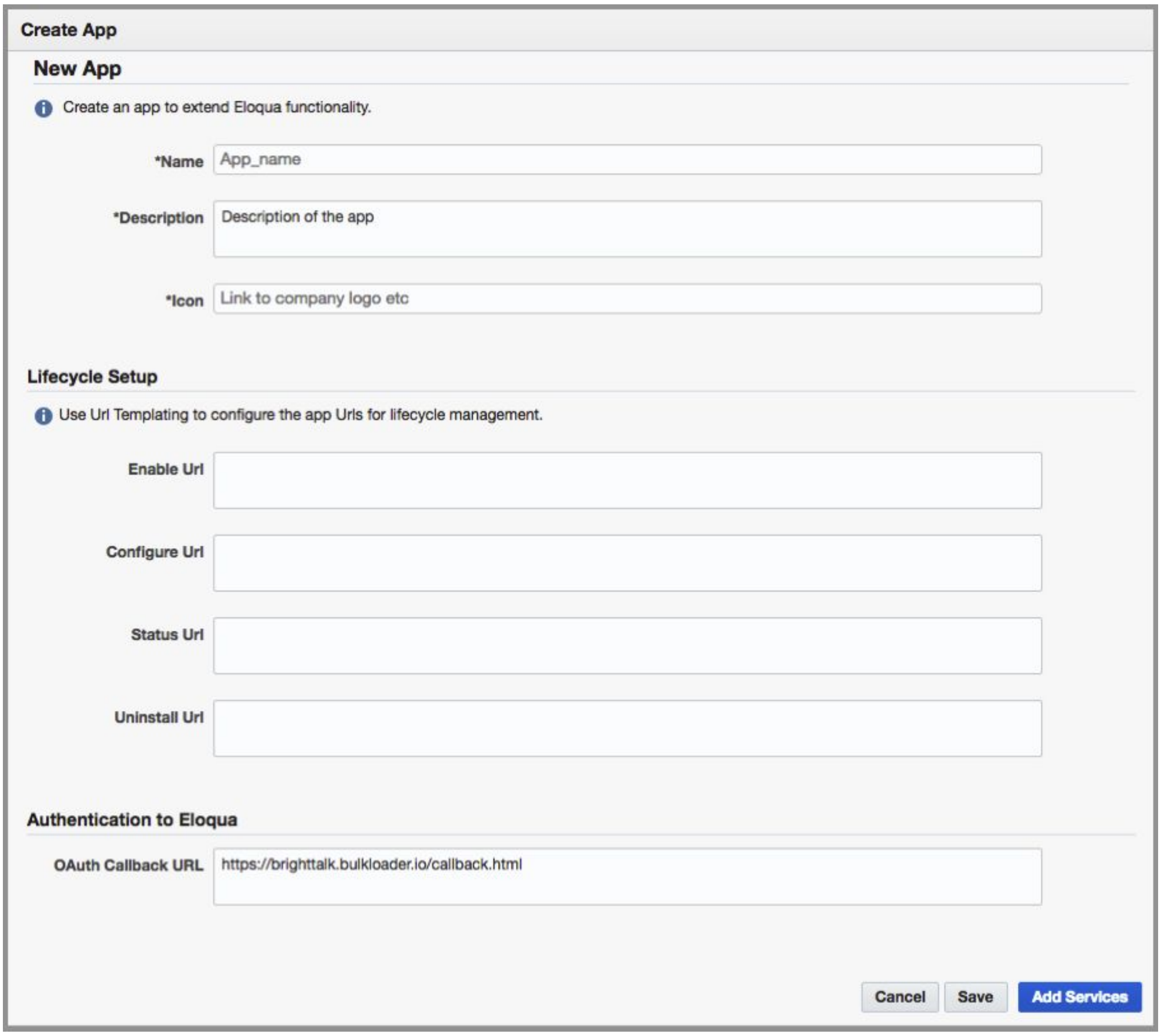


2. Once you've signed in, **click on the** "**Settings**" Icon and **select "AppCloud Developer"**.



3. Now you can create App.

4. Enter details as shown in following screenshot and click Save.



5. App is now created.

6. Click on the app to retrieve Client ID and Secret.

Now that you’ve created your Eloqua App/s, we can take a look at how to configure your field mapping relationships between BrightTALK and Eloqua.

Add Contact Field to Store the User Email

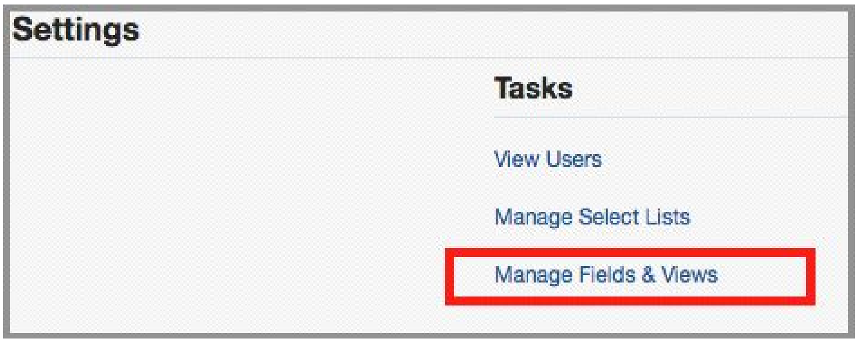
BrightTALK subscribers are identified by a unique email address. In order to use the BrightTALK for Eloqua connector, you will need to add a custom Contact Field, named e.g. “BrightTALK User Email”. Of course, you can also use the existing “email” field in your Eloqua instance.

Many of BrightTALK’s standard user fields will be automatically mapped to Eloqua.

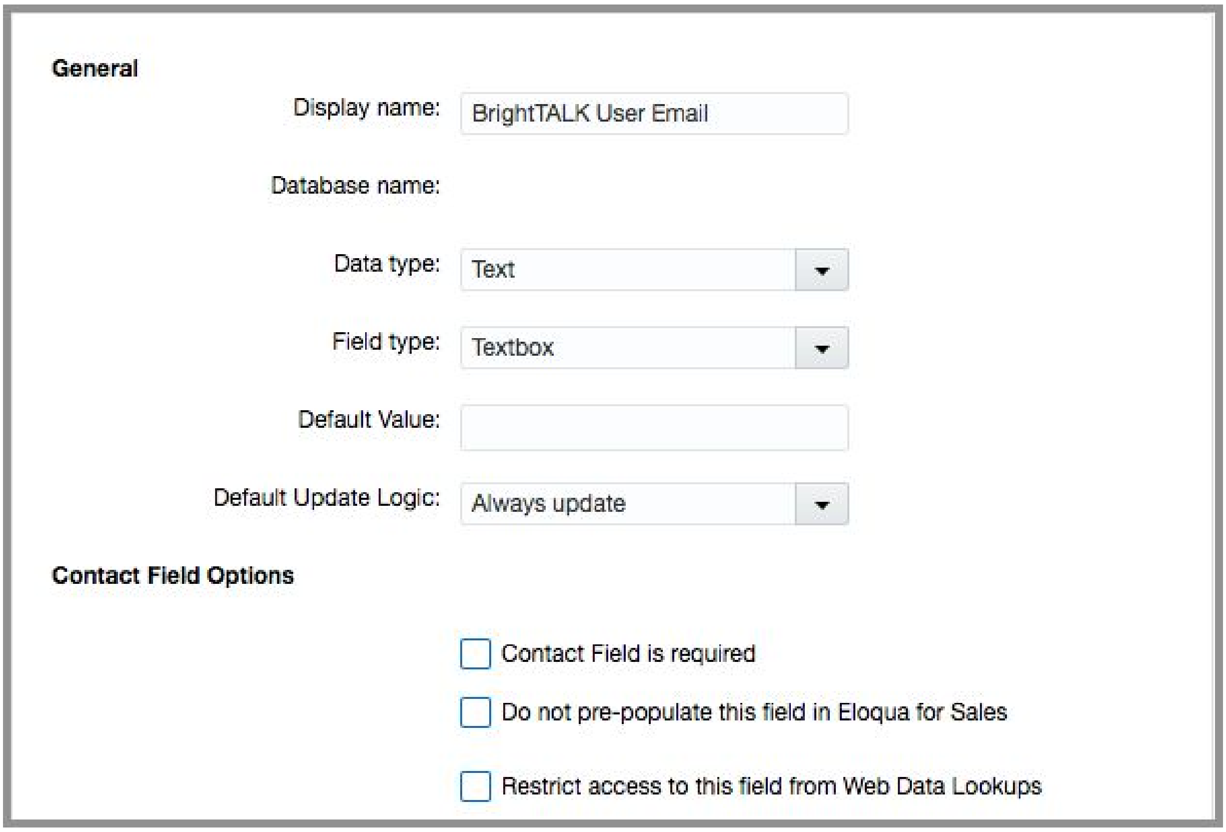
Please note: The full list of BrightTALK fields are available in the Field Mapping spreadsheet sent along with this document.

ACCESS THE SPREADSHEET TEMPLATE BY ***CLICKING HERE***

1. To create new fields in your Eloqua, select **Manage Fields & Views** from **Settings**



2. Click the “**+**” button located at the bottom left corner to add a new field to the Contact Fields. These custom fields will represent each of BrightTALK’s bespoke data fields. Let’s start by adding a new custom field called **“BrightTALK User Email”.**



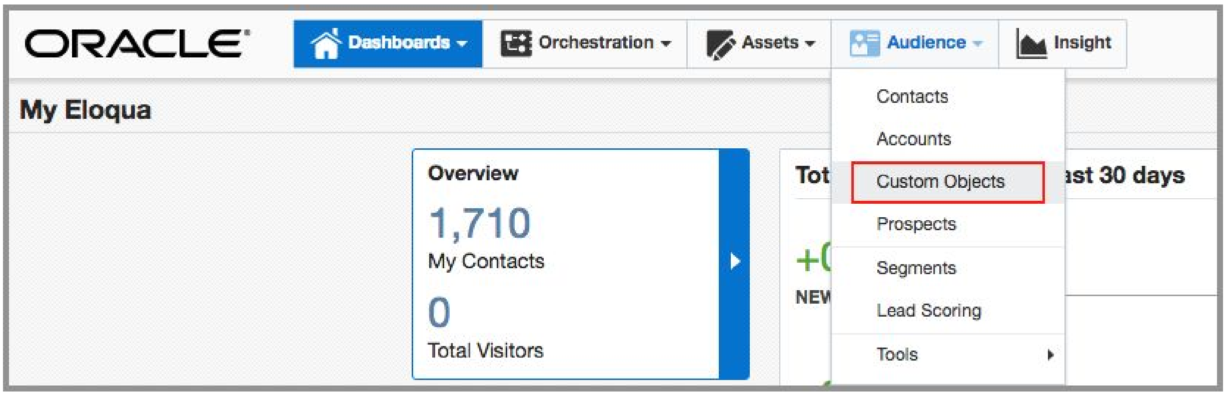
A list of all available BrightTALK fields is included in the Field Mapping spreadsheet sent along with this document
Once you have completed the above, you can click **"Save"**.

3. You can repeat step 2 to add as many of BrightTALK's properties as you require.
Ideally, you should add all fields in the spreadsheet, in order to provide as much data as possible to Eloqua.

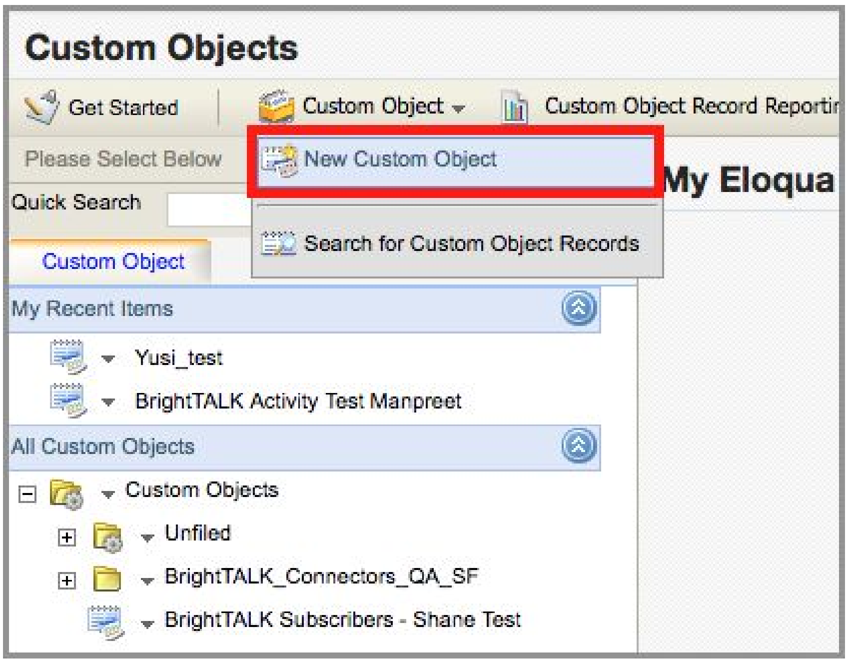
Adding Fields to your Custom Object

For **Subscribers Webcast Activity** and **Attachment Access** fields, we will be sending the data through your Custom Object. You can choose to create new fields or add existing fields to your custom object. We will go through the process of these below.

1. To find your Custom Objects, go to the main page of your Eloqua instance, hover over to the **Audience** tab on the top of your screen, and select **Custom Object**.



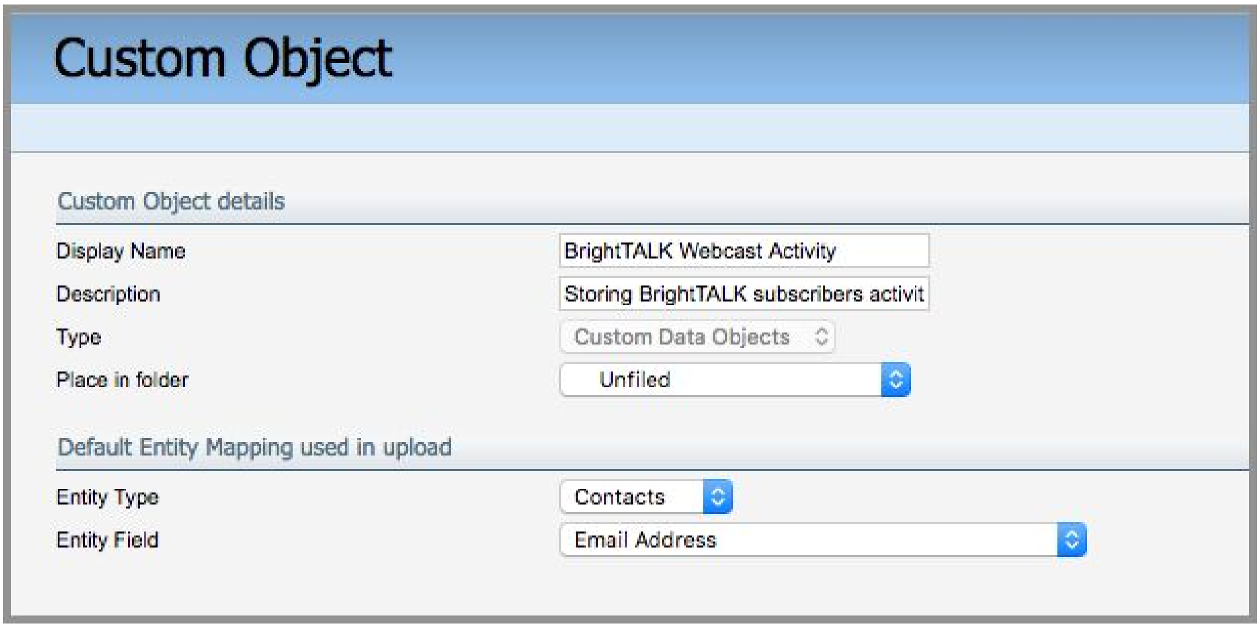
2. If you have your own Custom Object that you would like to use, please skip this step.
If not, you will need to create a new Custom Object.



We'll use BrightTALK Subscribers Activities as an example for creating Custom Object.

Step 1:

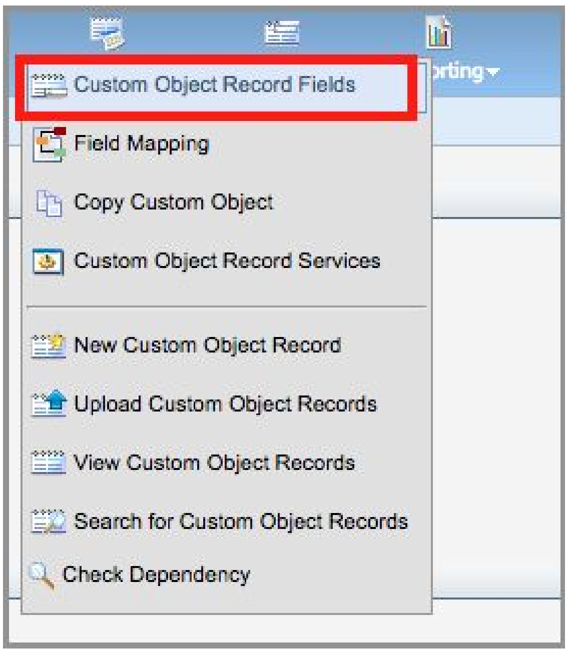
Enter a Display Name and Description for the Custom Object.
Set the Entity Type to “Contacts” and Entity Field to “Email Address”. Click “Next”.

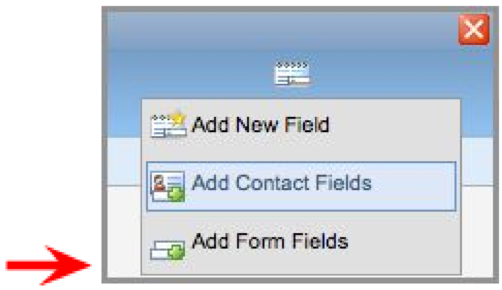


Step 2:

Add fields to the Custom Object to store the supported reported BrightTALK activity data you require. (The full set of available activity data is listed in the field mapping spreadsheet). To do this as part of adding a new Custom Object, click the dropdown link with the label “Custom Object Fields” at the **top-right hand side** of the screen and click on “**Add New Field**”.

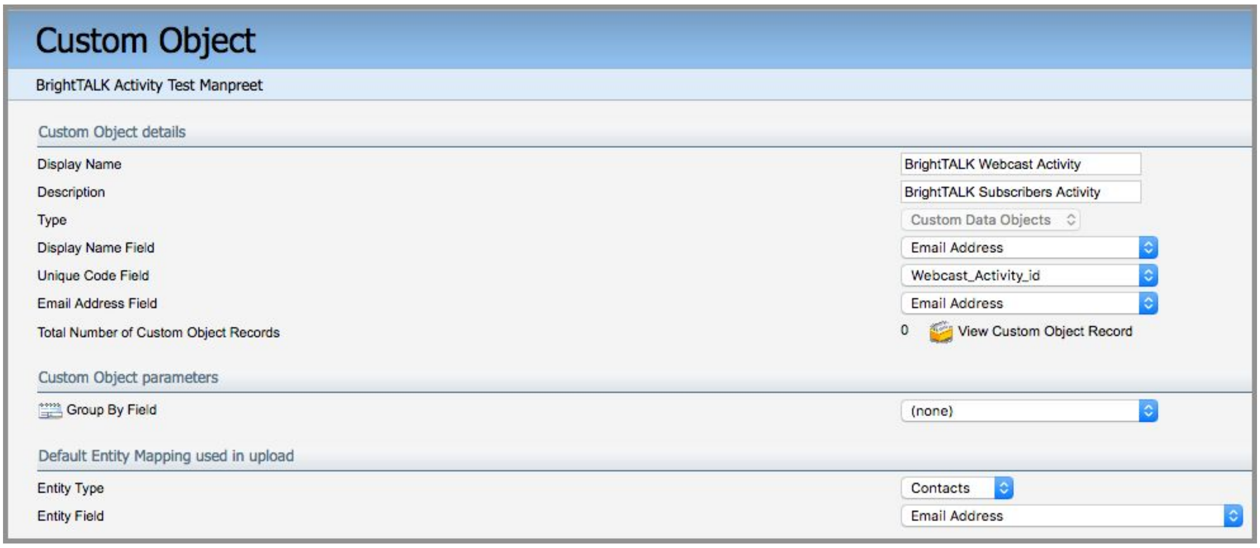
Note that while mapping the PreRegistered field, the value for checked should be “true” and the value for unchecked should be “false”.





Step 3:

After the Custom Object field definitions have been created, return to the Custom Object details page and configure the Display Name field to “BrightTALK User Email”, Unique Code field to “Webcast Activity ID”, and Email Address field to “Email Address” as seen in the figure below and save the changes.

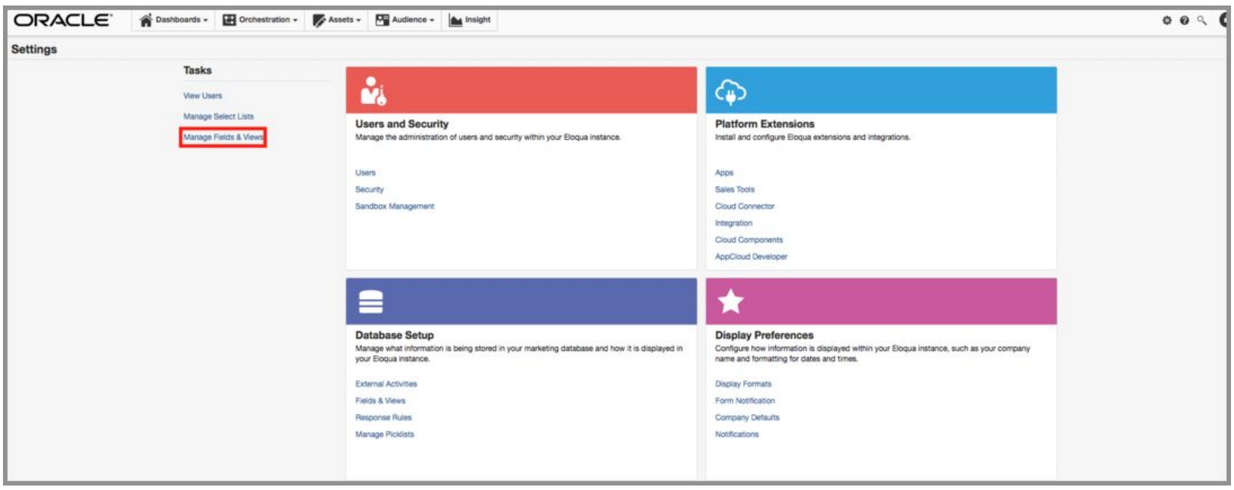


Next, we’ll look at how to add a field for a channel which contains a survey.

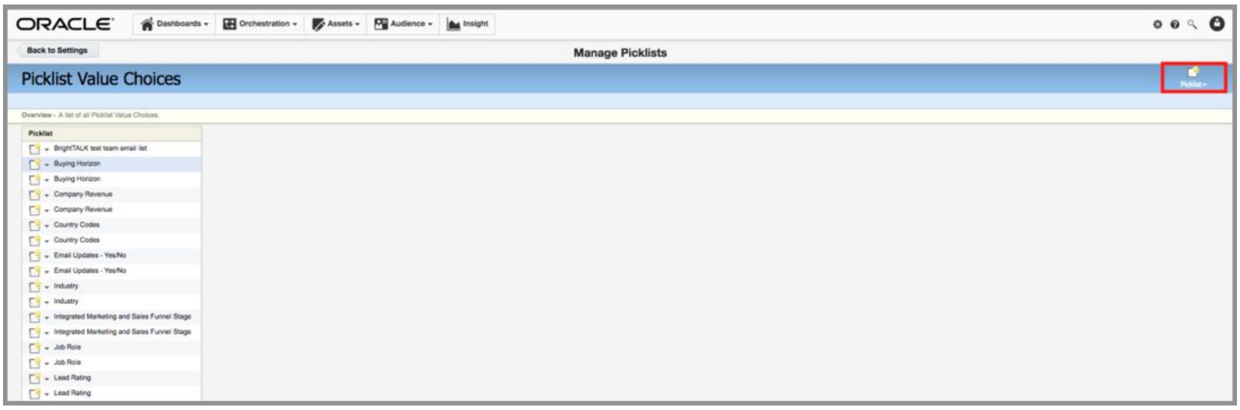
Creating a Multiple checkbox field for your channel survey

If your BrightTALK channel includes a **survey that contains multiple choice options** then you’ll also need to know how to configure a multi checkbox field in order to capture your survey responses in Eloqua.

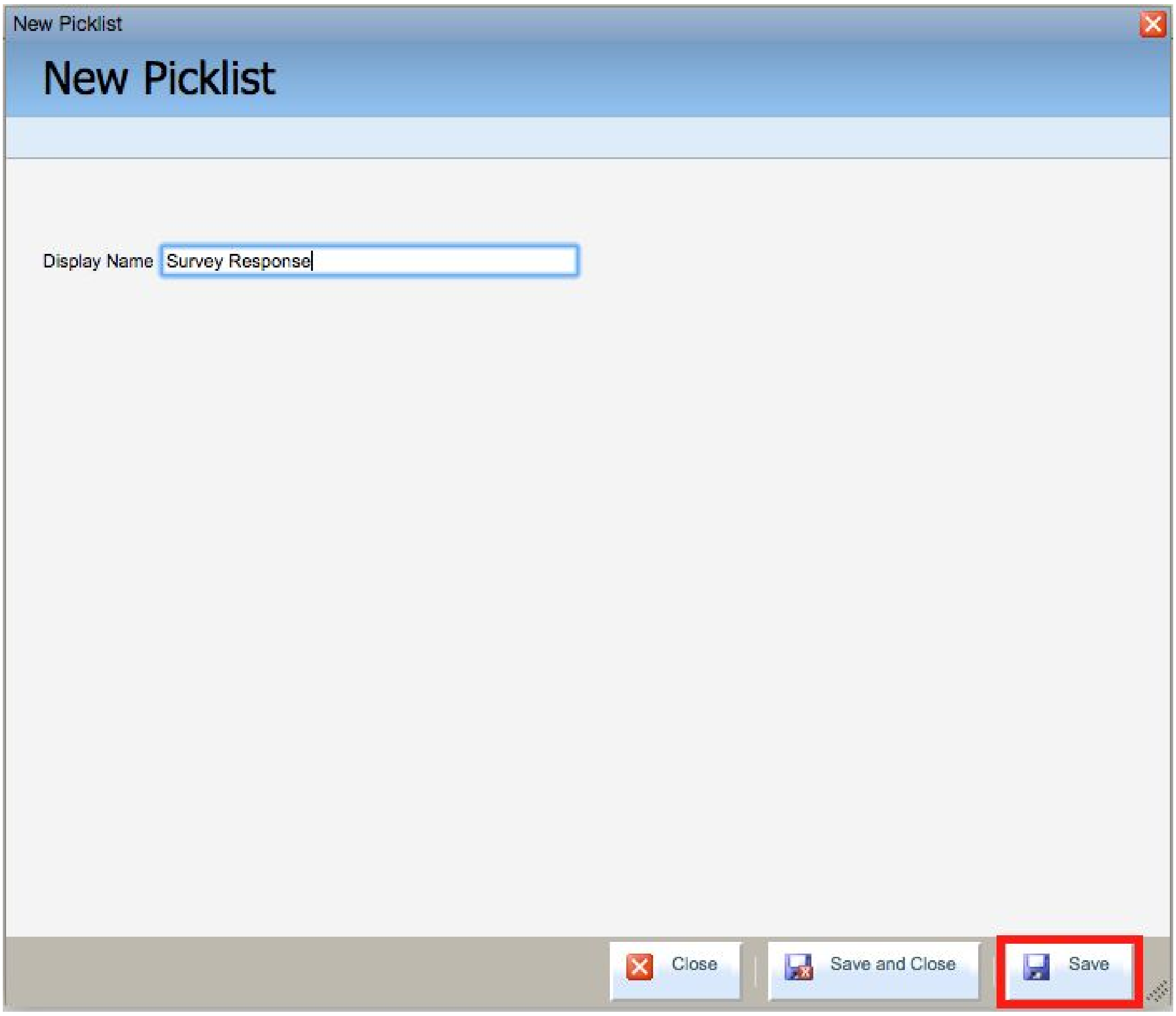
1. First we need to add a new picklist for your survey question. Go to the “**Settings**” icon in your Eloqua and click “**Manage Select Lists**” on the left sidebar.



2. On the upper right corner of the Manage Picklists screen, you can select **Picklist -> New Picklist**

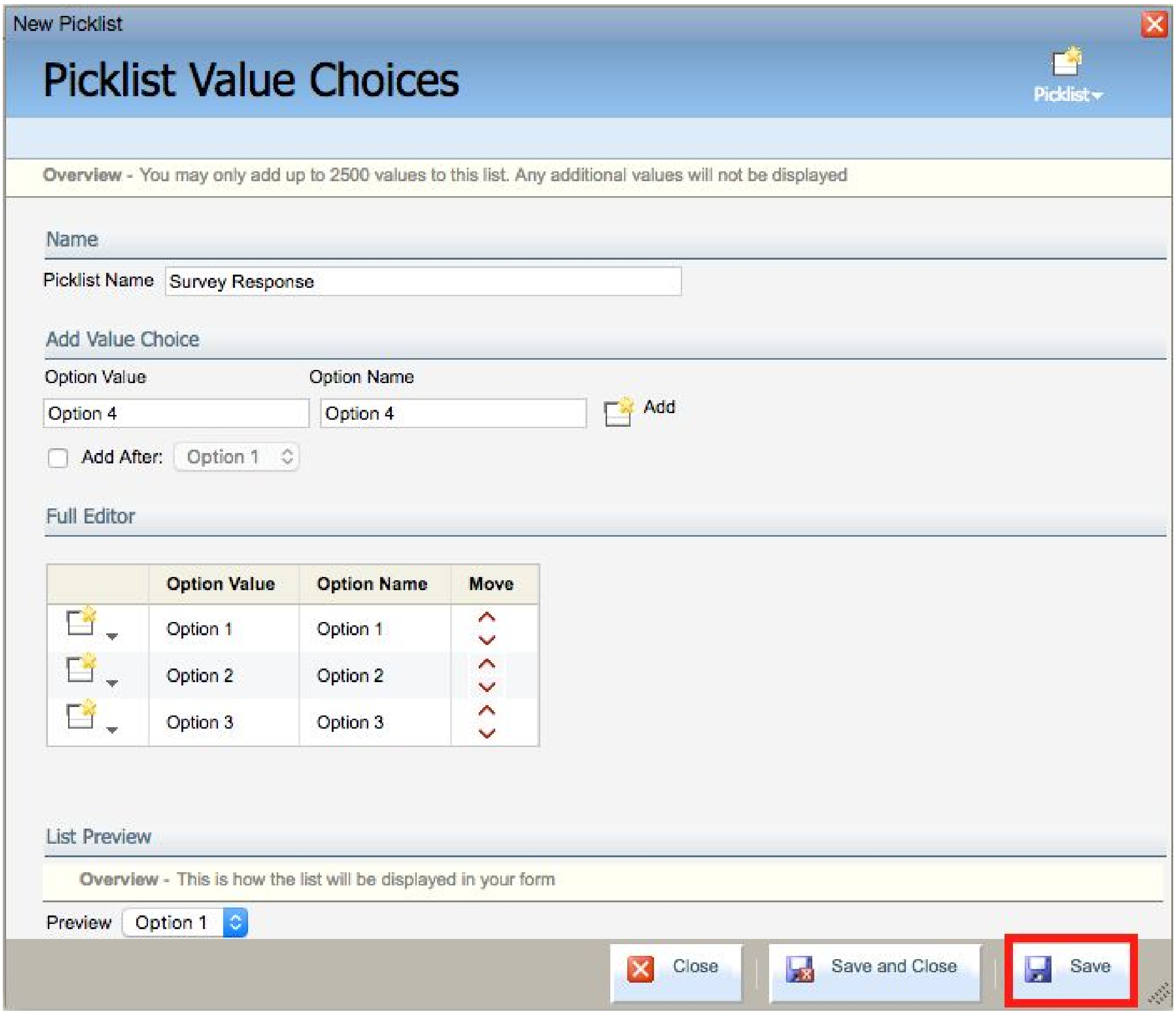


3. Now let’s create the new picklist. Enter the name of the picklist and click “**Save**”



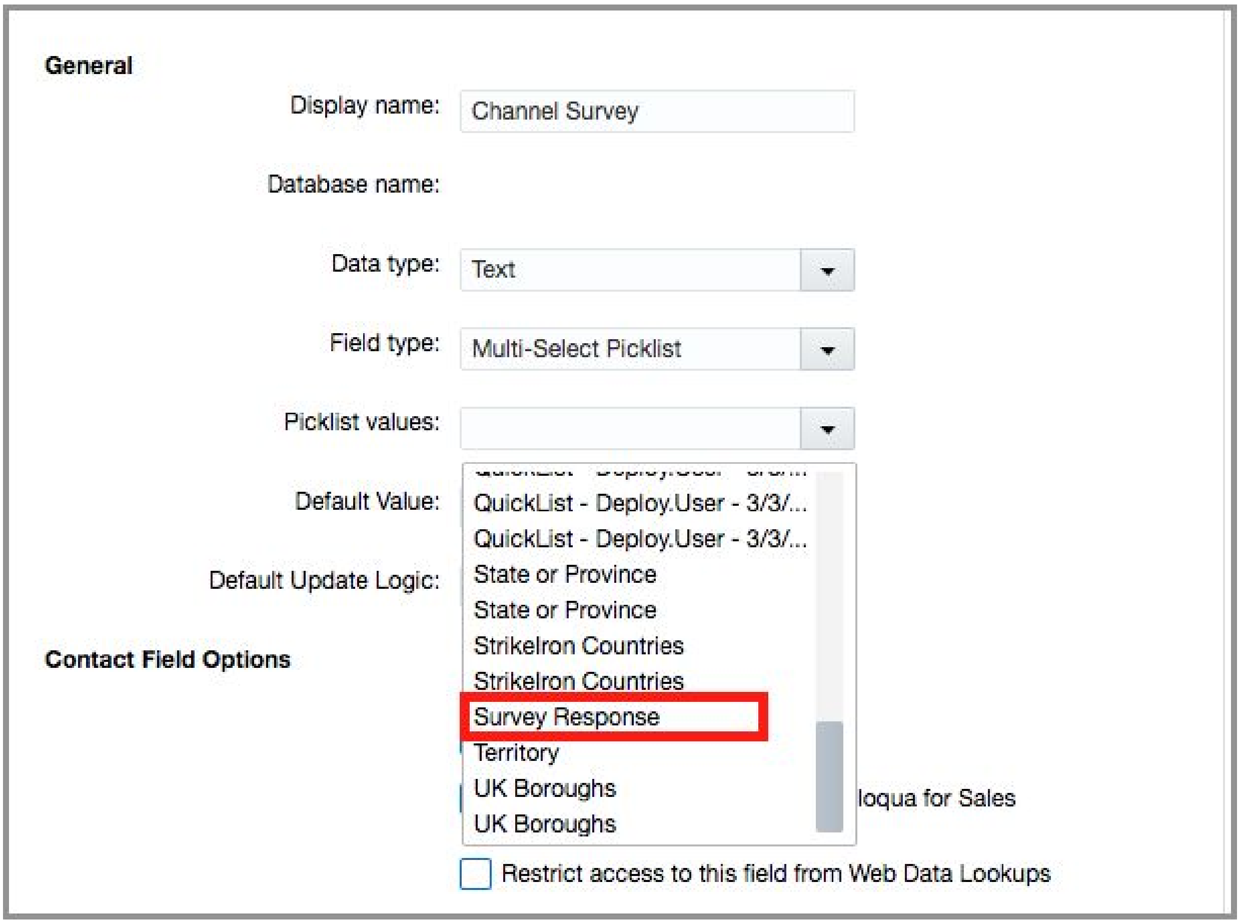
4. Add all of your channel survey responses as they appear within your channel survey. And click “**Save**”. In the example below, we have simply named each response as “Option 1”, “Option 2” etc. Your options should be modified to reflect your channel survey responses - this will better assist you when you carry out the data mapping process.

Please note the responses have to be exactly the same as they appear in your channel survey.



You should be seeing the picklist appear in your list on the left side of the screen.

5. Follow the process described in step 6 of “Creating Custom Fields on Eloqua” to begin creating a new field. When you select **“Field type”, choose “Multi-Select Picklist”.**
You should be able to see the picklist you created earlier appear in the “**Picklist values**” dropdown. Click on the right value and select “**Save**”.



How to use Bulkloader

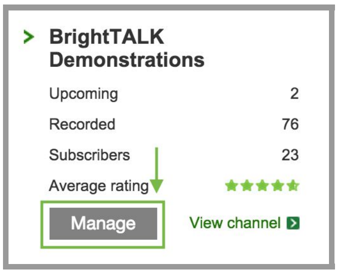
"**Bulkloader**" is a web application which facilitates mapping of fields and sync data between BrightTALK and Eloqua. This application enables you to create and configure data mapping relationships as well as schedule data synchronisation jobs. Here's a summary of Bulkloader's main features:

- Create BrightTALK and Eloqua endpoints
- Create data mapping for *Subscriber, SubscriberWebcastActivity, SubscriberWebcastAttachmentAccessSummaries* and *SurveyResponses* fields to Eloqua contacts fields.
- Schedule data synchronisation jobs
- Check the history of the scheduled jobs.

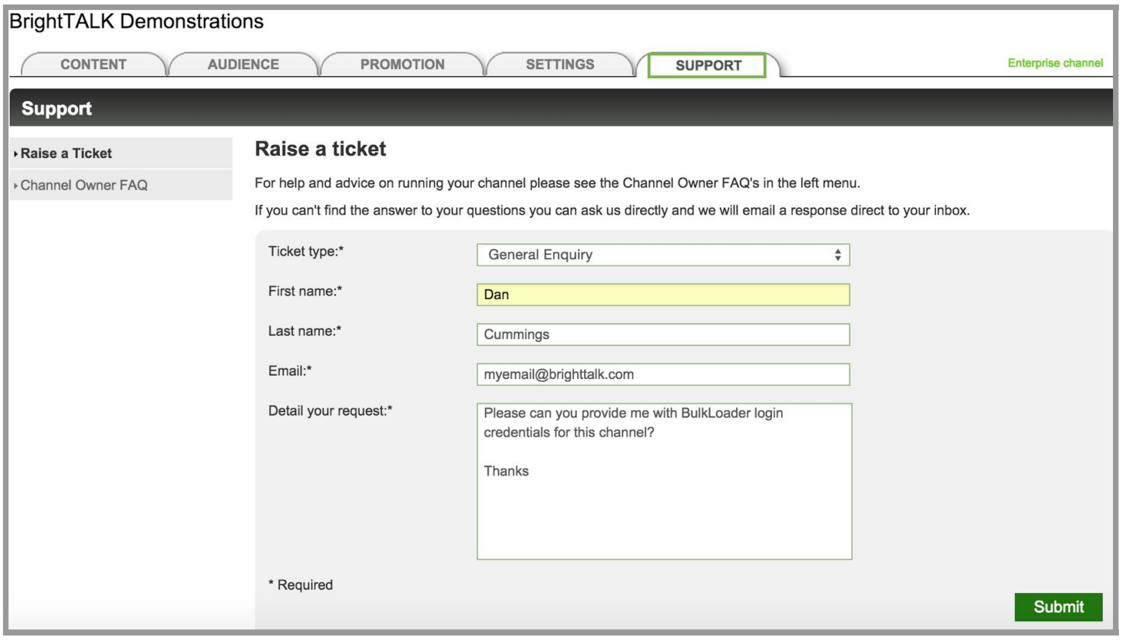
Acquiring your Bulkloader login details

In order to access **"Bulkloader",** you first need to request login credentials from BrightTALK. Here's how to request these credentials:

1. Log into your BrightTALK and **"Manage"** channel.



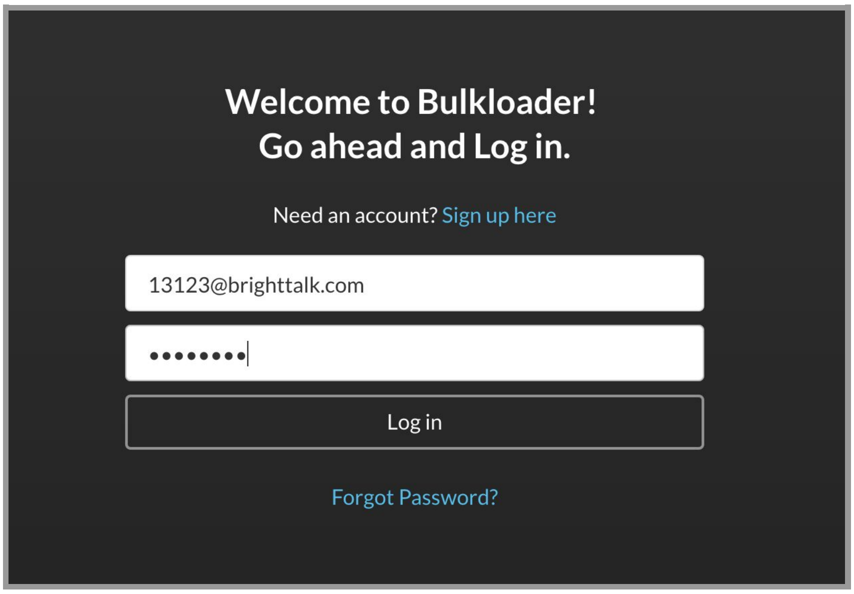
2. Navigate to the “Support” tab and **raise a ticket requesting “Bulkloader credentials for this channel”**



3. A member of the BrightTALK Support team will email your “Bulkloader” login credentials to you.

Logging into Bulkloader

1. Visit the following URL: https://brighttalk.Bulkloader.io/
2. Enter the username and password provided to you by BrightTALK Support.



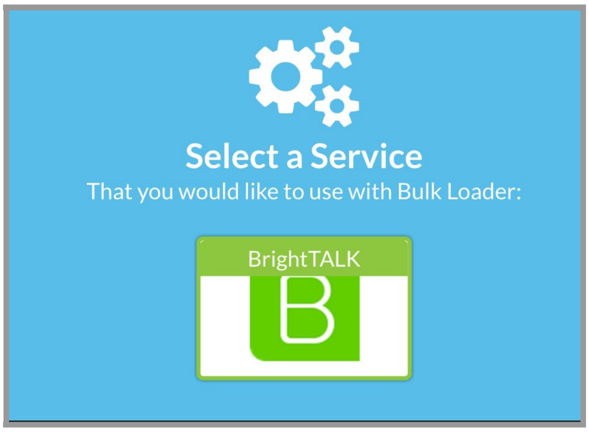
Creating the Endpoints

Now that you are logged into **“Bulkloader”**, you can create **“Endpoints”** for BrightTALK and Eloqua. **“Endpoints”** are simply the source and destination of your BrightTALK user data.

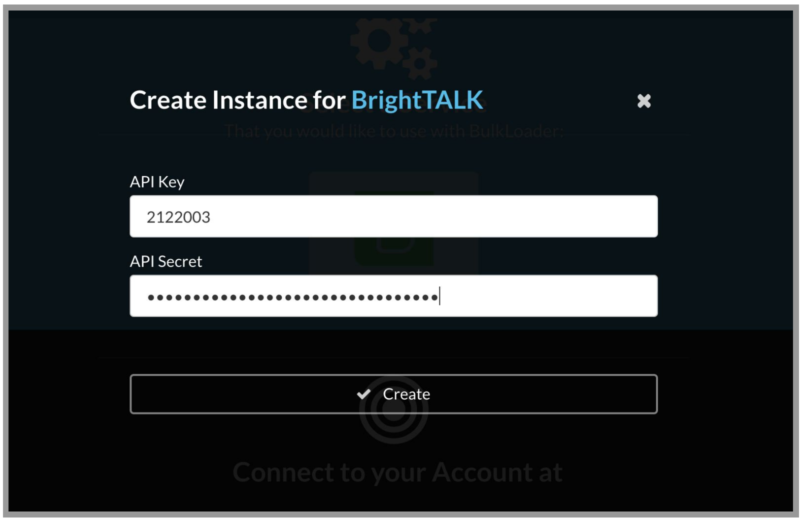
We’ll **create the BrightTALK source ‘Endpoint”** to begin.

Creating the BrightTALK Endpoint

1. **Select the BrightTALK icon** and click **“Edit”** as the option is revealed below the icon.



2. Enter your user “**API Key**” and “**API Secret” and then “Create”.**
If you don’t have your BrightTALK API Key and Secret then please request these from the “Support” tab within your channel.



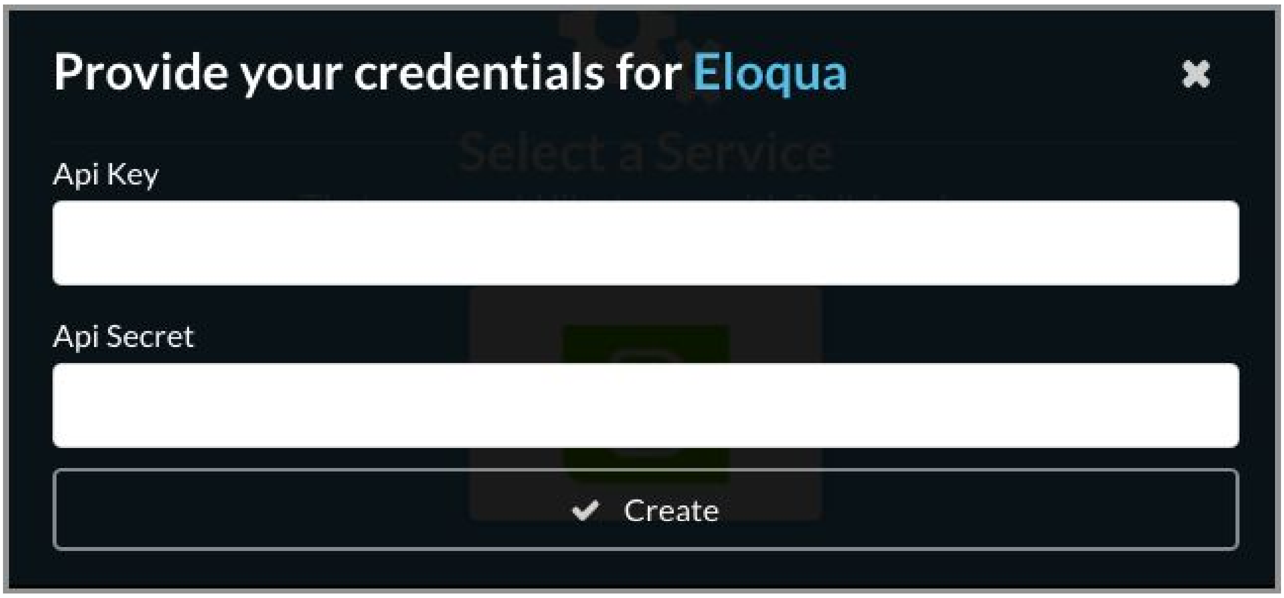
Your BrightTALK source **“Endpoint”** is now enabled. Now we can configure the Eloqua “**Endpoint”**.

Creating the Eloqua Endpoint

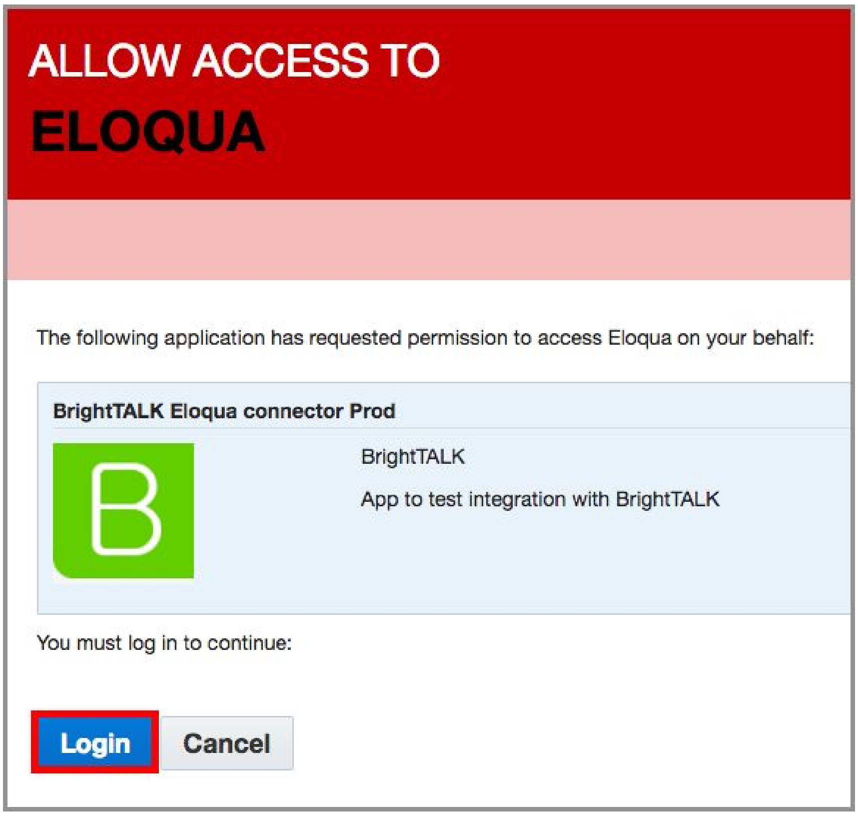
1. Select the **“Connect to Eloqua”** icon.

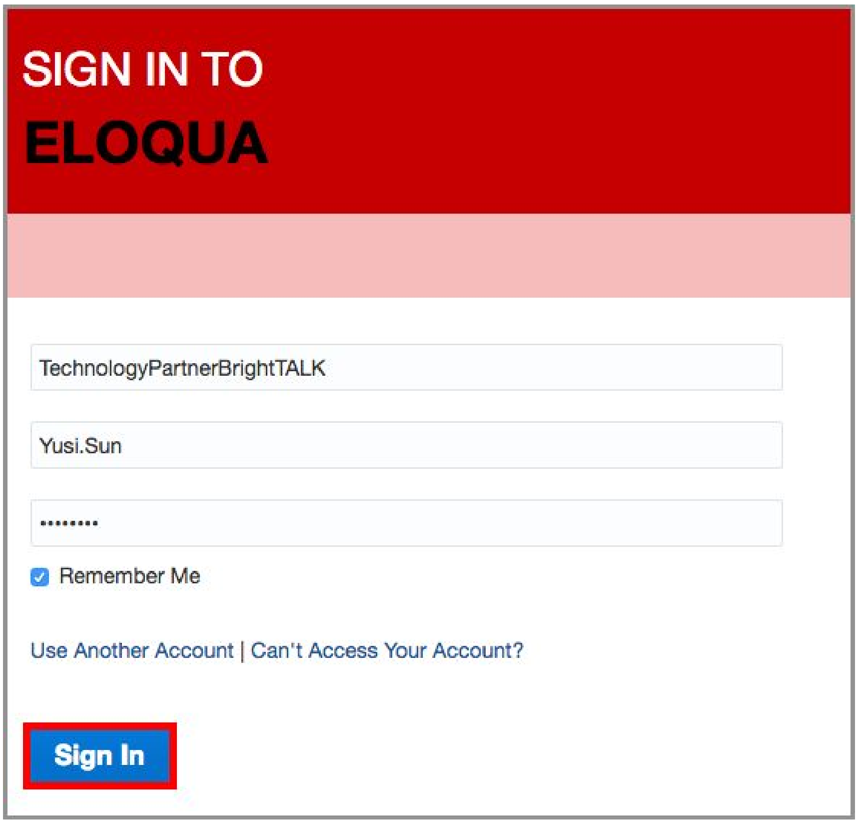
2. For **“API Key”** and **“API Secret”** we can enter the Eloqua **“Client ID”** and “**Client Secret**”.

Once you’ve entered the above details, click **“Create”**.

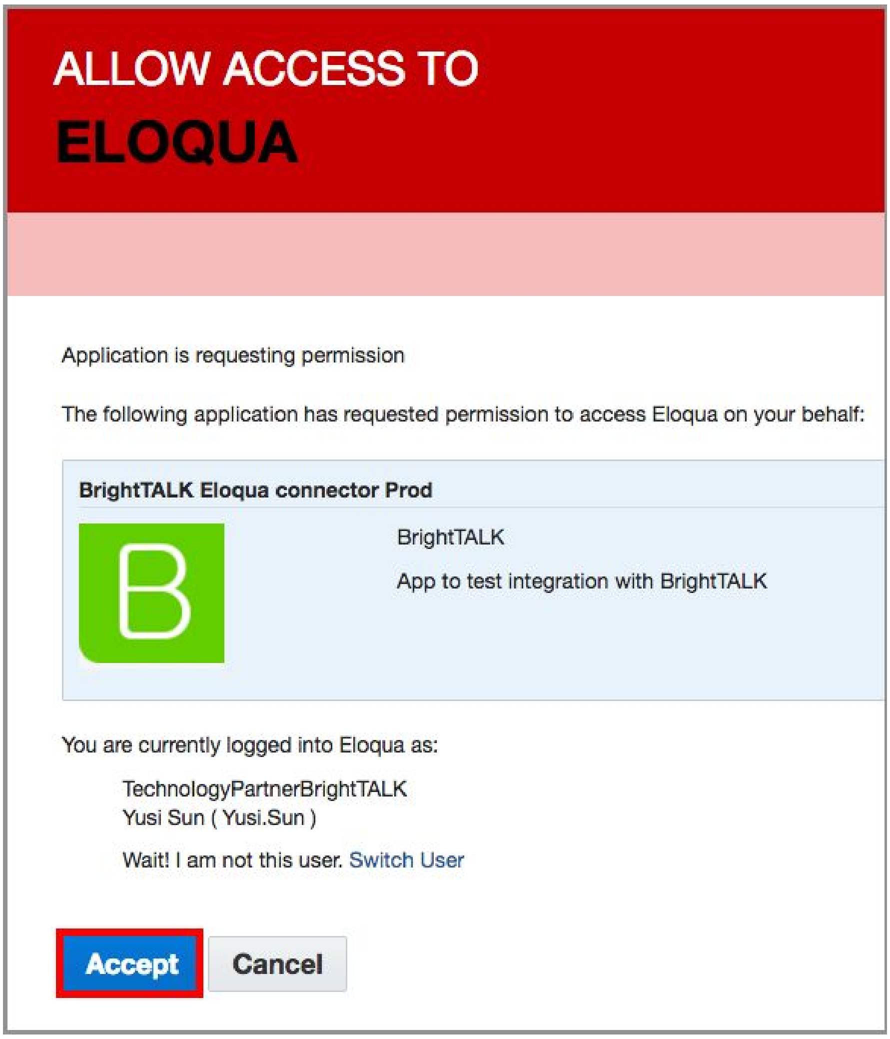


3. To complete the Eloqua connector **“Endpoint**” process, you have to follow the prompts to **login to Eloqua** and **authorise the connector**. Enter your Eloqua login details in the pop-up box.

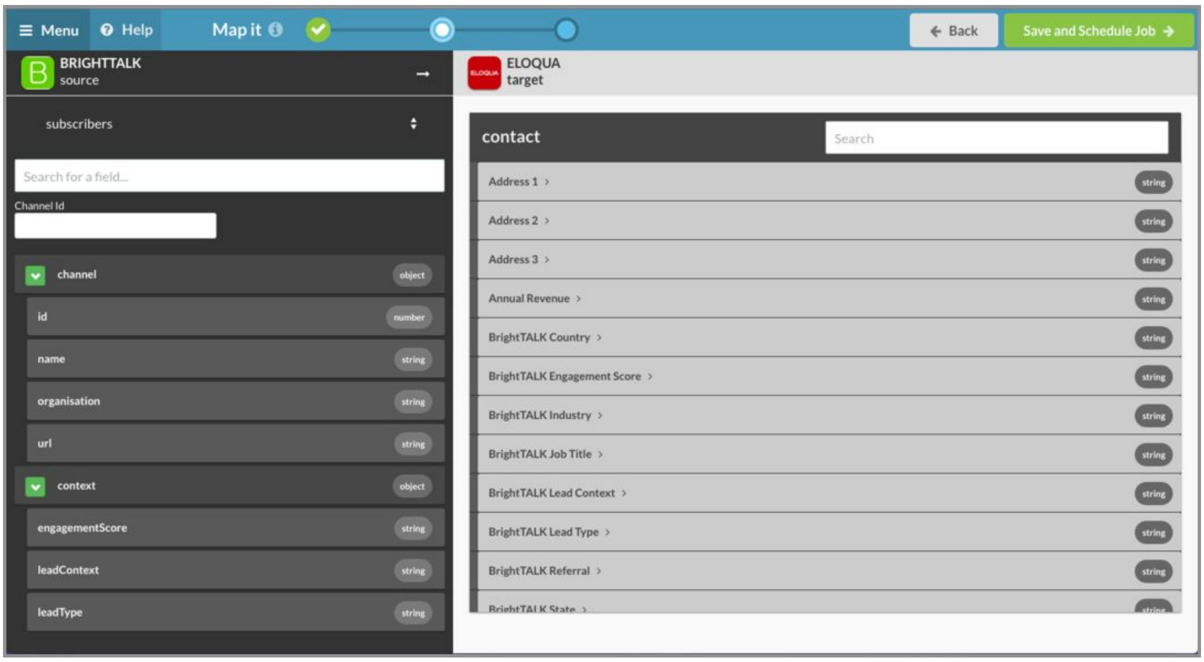




4. After you've successfully logged in, you need to **"Accept"** the permission from Bulkloader.



Once authorization is successful you will see the mapping page displayed.



Next, we'll look at how to set up your data mapping relationships and create scheduled data synchronisation jobs.

Configuring data mapping and scheduling synchronisation jobs

Both your BrightTALK and Eloqua **“Endpoints”** have been created - now we can schedule our first job, and establish data mapping relationships between BrightTALK and Eloqua fields.

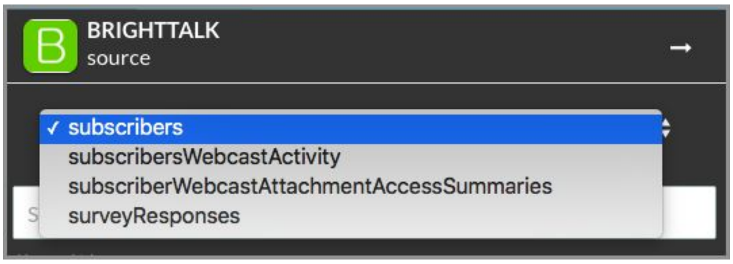
1. Log in to “Bulkloader”.

2. To create a job, first **click** on the **BrightTALK icon** of the page to **highlight** it green. Secondly, **click** on the **Eloqua icon** to **highlight**.

A mapping screen will be displayed.
If you have followed this user guide in a linear fashion, then you will already be on the mapping page, removing the requirement to select both icons.

The BrightTALK **“Endpoint”** has four data objects (*or data sets*):

- *subscribers*
- *subscriberWebcastActivity*
- *subscriberWebcastAttachmentAccessSummaries*
- *surveyResponses*



Now we can configure our data mapping relationships.

Configuring data mapping

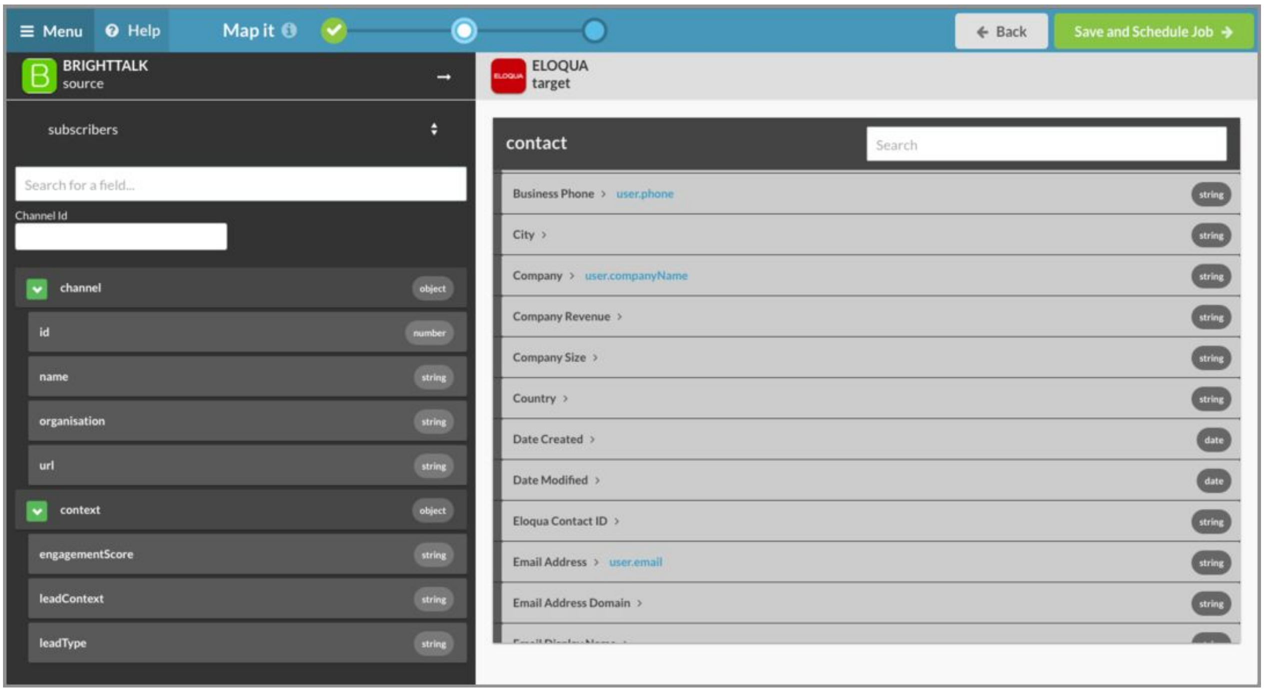
You will need to reference the following information whilst configuring the data mapping and scheduling jobs:

Channel ID - The channel ID for the job being created. This is a mandatory field. The channel ID is identical to the username of your **“Bulkloader”** login credentials. For example, if your login is 12345@brighttalk.com - then 12345 is your channel ID.
Webcast Id - This is an optional field. **If no value is entered then activities for all webinars will be synce**d. If a webcast value *is* provided here, then activities for only that webinar will be synced.
Survey Id - The ID of your channel’s survey. This ID is only required if you have an active channel survey and wish to transfer survey responses to Eloqua. When you are provided login credentials for **“Bulkloader”**, **you will also be provided with the survey ID associated with your channel**.

Along with this guide we will send you a spreadsheet with the full list of fields that are available for mapping. The spreadsheet will have four tabs, corresponding to the four objects we will go through later. Please be noted that the fields marked in red are mandatory fields to be mapped in Bulkloader.

1. To map the BrightTALK source fields to the Eloqua target fields, **you need to drag and drop** the corresponding **BrightTALK field** over to the target **Eloqua field.**

The Eloqua targets section will list the source field next to the target field (*in blue text*) to indicate the mapping relationship.

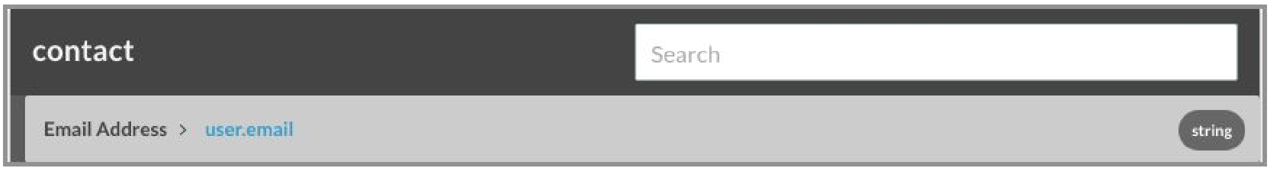


You will notice that some common fields will be automatically mapped to the corresponding Eloqua field. The full list of automapped fields is available in the Appendix.

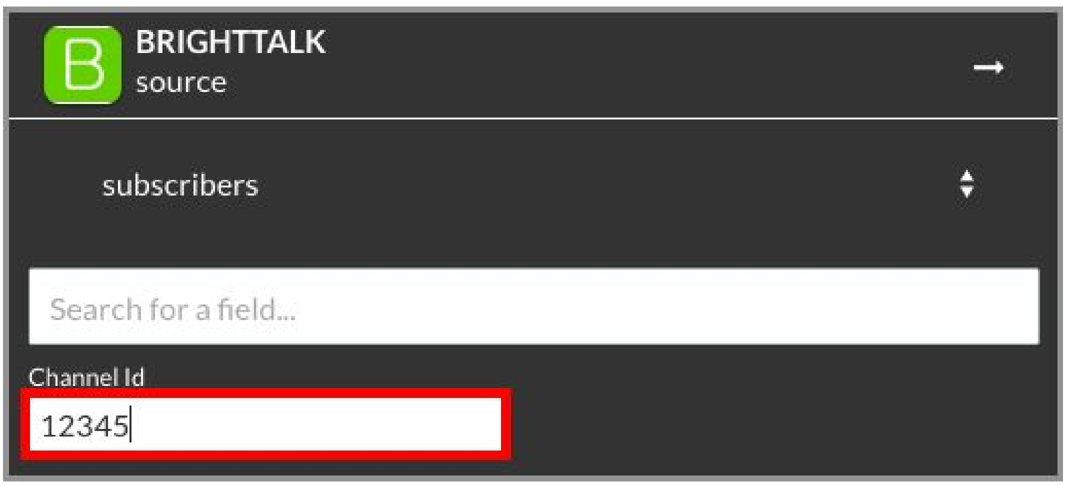
Eloqua uses the field **"Email"** as the unique identifier for contacts. It is a mandatory requirement to map BrightTALK's **user.email** field to Eloqua's **"Email"** field.

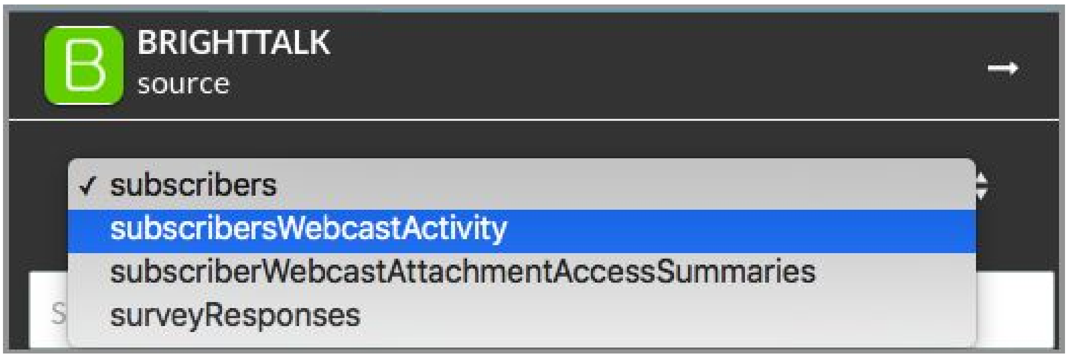
*If **"Email"** mapping is not configured then Eloqua will always create a new contact.*

"Email" field mapping must be carried out for all data objects.

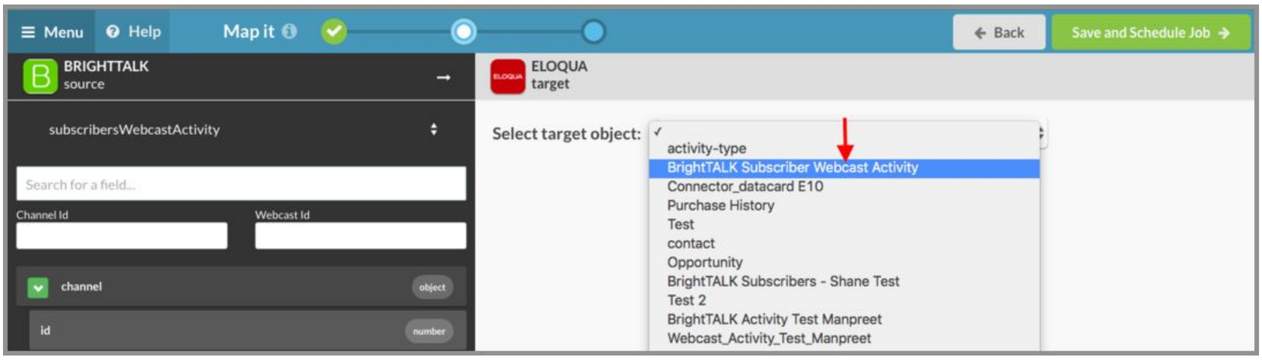


2. Once you have completed mapping all fields within a data object e.g within the **"Subscriber"** object - you need to **enter your channel ID** so Bulkloader can save the mappings**.** Then pick the next object **subscribersWebcastActivity** from the pick list.

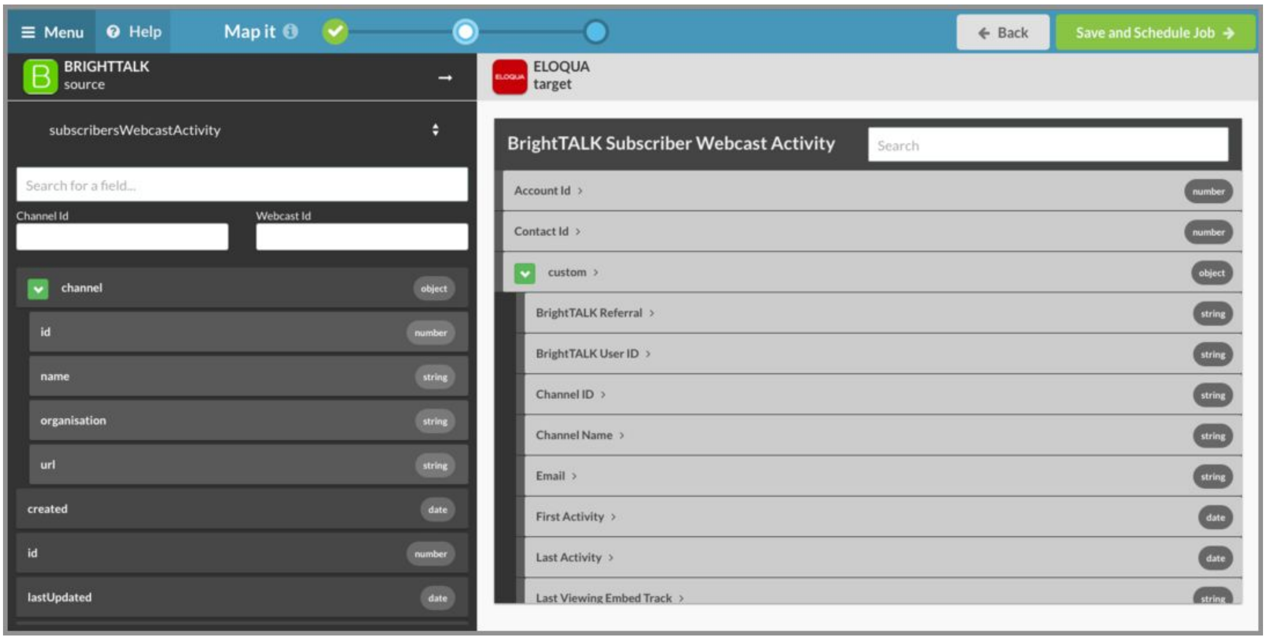




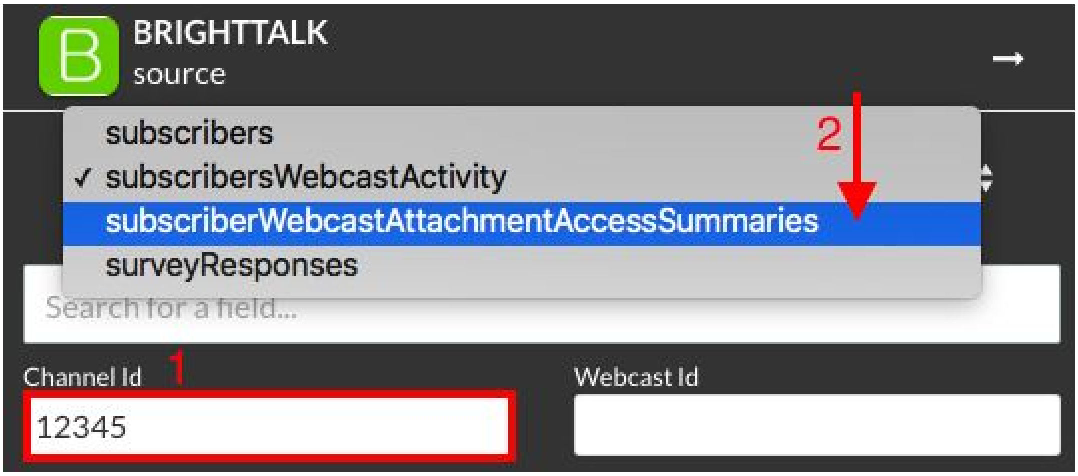
3. Now let’s move on to the next object - **subscribersWebcastActivity.** This object contains the details of your subscribers’ interactions with your channel. Bulkloader will prompt you to choose the custom object that you would want to use.



4. **Drag and drop** the corresponding **BrightTALK field** over to the target **Eloqua field.**



5. **Enter your channel ID** so Bulkloader can save the mappings**.** Then pick the next object **subscribersWebcastAttachmentSummary** from the pick list. Repeat step 3 and 4 for this object.



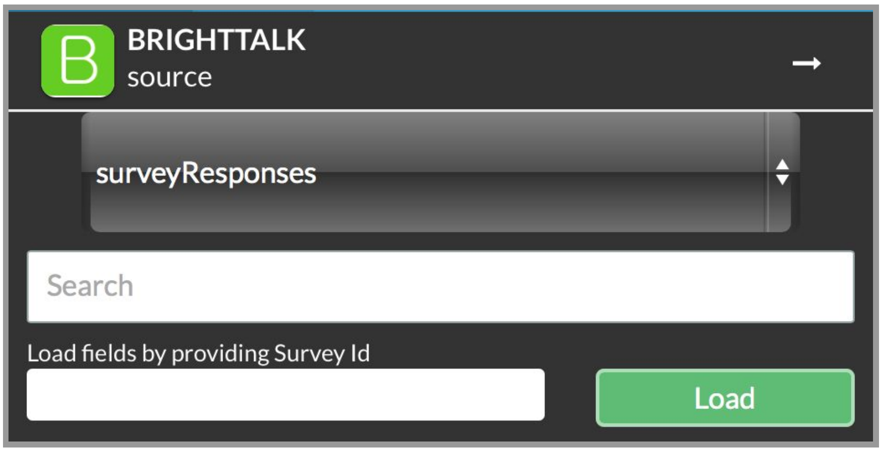
6. **Enter your channel ID** again and move on to the next object "**surveyResponses**".

Mapping surveyResponses data object fields

Mapping the "surveyResponses" data object fields is a little different from mapping the other data objects. "surveyResponses" data object fields have to be created dynamically using the **"Survey ID"**. The steps below will show you how to create the survey fields.

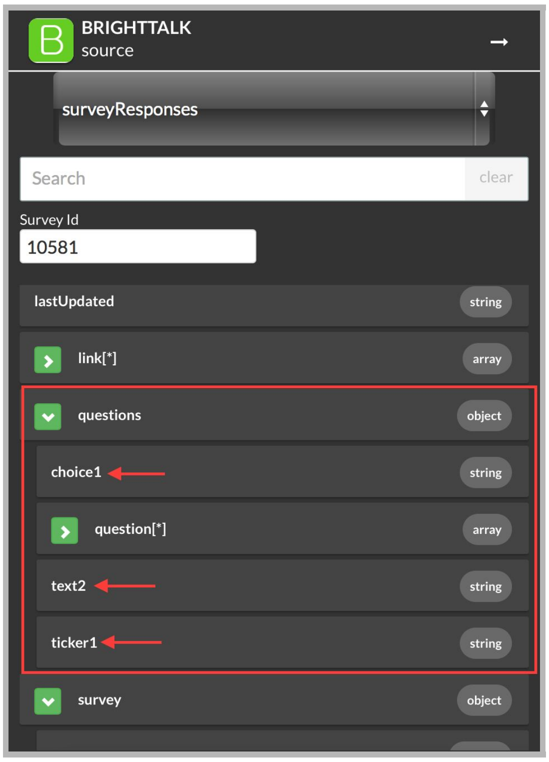
Make sure you remember to map the "Email" field once more in this section.

1. Whilst on the mapping page, **select** the **"surveyResponses"** data object from the drop down menu.



2. Enter the channels' **"Survey ID"** (sent to your by BrightTALK Support along with your **"Bulkloader"** login credentials) and click on the **"Load"** button.

3. If the **"Survey ID"** you entered is recognised then all of your reporting IDs (that correspond to each of your channel survey responses) will be displayed under the **"questions"** element. You can now **map these fields** to custom (or default) Eloqua fields.



That's your survey responses mapped. Now we'll look at scheduling a data synchronisation job.

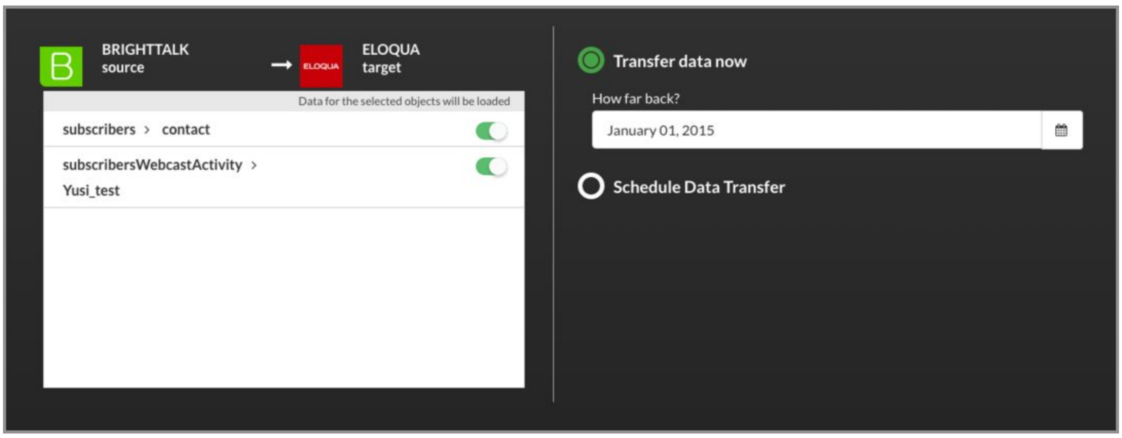
Scheduling a job

The Eloqua **"Bulkloader"** supports two types of data transfer jobs:

Transfer data now - this will run a single instance of the job i.e it will not repeat.
Scheduled data transfer - this will allow you to create jobs that can be executed at regular intervals.

Transfer data now

1. Use the **"How far back?"** option to select the earliest date you'd like your data to pull from. i.e you could choose to sync all data from the last 12 months.



2. Click on **"Transfer Now"** to run the data transfer job immediately.

Scheduled Data Transfer

1. Select the **“Schedule Data Transfer”** option from the main **“Schedule”** page.

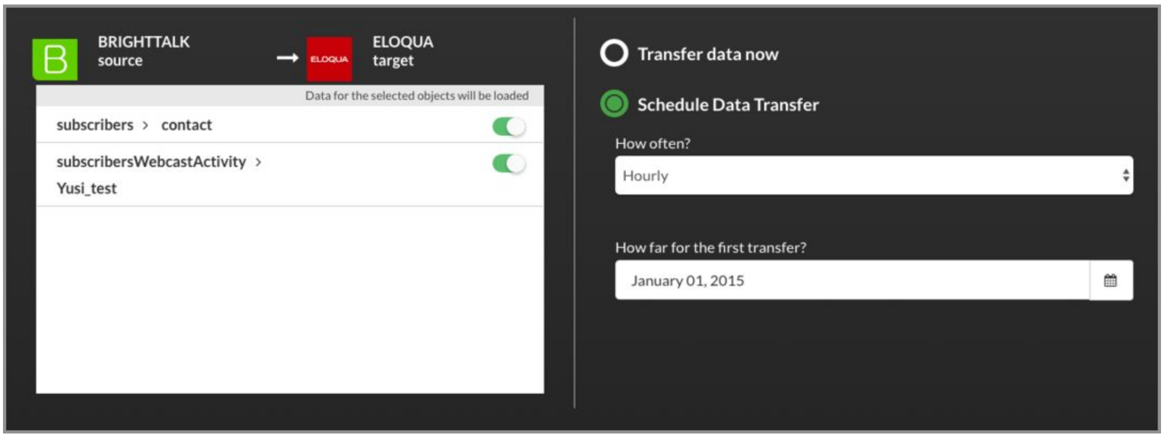
2. Use the **“How often?”** drop-down menu to **select the frequency of the data transfer schedule**.

3. The **“How far for the first transfer?”** option allows you to select the earliest date from which you want to sync data.

If this is the first ever sync being scheduled for this channel, and the intention is to sync all historic data- please choose a date in the distant past such as January 1, 2000.

*For the subsequent jobs, the most recent **lastUpdated** value, found from the records synced in the previous run, will be used.*

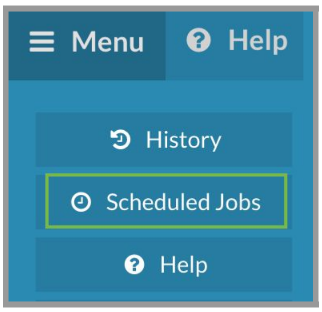
4. Click on the **“Schedule Transfer”** button to schedule the job.



Your data synchronisation jobs are now scheduled. In the next section we’ll look at how to manage your **“Scheduled Jobs”**.

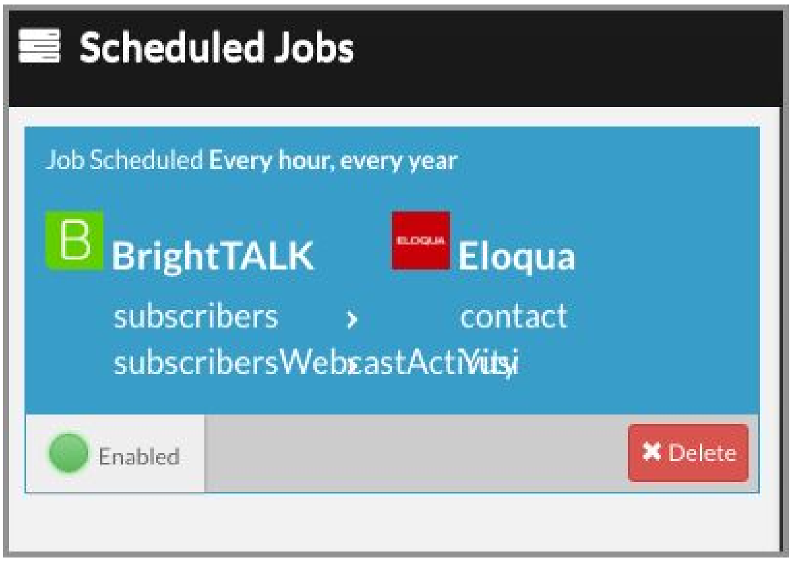
Manage Scheduled Jobs

1. In order to manage your **“Scheduled Jobs”**, navigate to **“Menu”** and then to **“Schedule Jobs”.**



The left side of the web page will display all the **“Scheduled Jobs”** that you have created. Each job will have the following attributes:

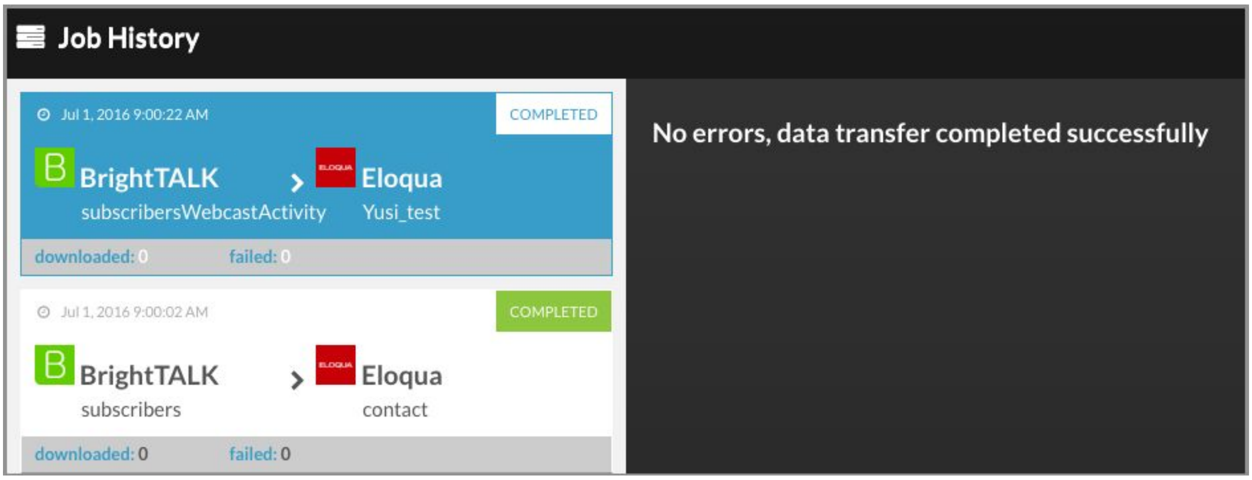
- **Schedule information** - e.g every hour, every year
- **Source** and **Target** endpoints - e.g BrightTALK > Eloqua
- The **object** transferred by the job - e.g subscriber > contacts
- **Enable/Disable** buttons - this is a toggle button that you can use enable or disable your job.
- **Delete Button** - you can delete your job using this button.
- **Job History -** once you select a job, the history of the job's execution is displayed.



Job History

You can view the history of each of your jobs:

1. Navigate to **"Menu"** and then to **"History"**.
2. The **"Job History"** also displays the **"Job Description"** alongside the time when the job was executed. Once a job is selected, the description about the execution is displayed.



Appendix

Default Mappings

Bulkloader provides some mapping by default for each of the Objects.

Subscribers

BrightTALK Field	**Eloqua Field**
user.email	Email Address
user.firstName	First Name
user.lastName	Last Name
user.phone	Phone
user.jobTitle	Job Role
user.companyName	Company
user.stateProvince	State or Province

SurveyResponses

BrightTALK Field	**Eloqua Field**
user.email	Email Address
user.firstName	First Name
user.lastName	Last Name
user.companyName	Company

ACCESS THE SPREADSHEET TEMPLATE BY *CLICKING HERE*