



# Scribe 3<sup>rd</sup> Party Integration in Intrado

## Overview

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Intrado Integrations consist of platform capabilities that provide:

- Data exchange between 3<sup>rd</sup> party applications and the Intrado application using RESTful APIs.
- Data exchange between Intrado and Eloqua/Marketo automation platforms that are native to Intrado.
- Data exchange between Intrado and 3<sup>rd</sup> party applications using Scribe that are non-native to Intrado.

### Additional information:

- **Native:** Integrations defined as Product Capabilities that are part of the platform code base and are managed and maintained through the Intrado Release Process controlled by Product Management.
- **Non-Native:** Integrations defined as 3<sup>rd</sup> party applications that can use the Intrado RESTFUL APIs or have a Connector available in the Scribe Marketplace that can be used to build and manage data integrations.

Note: Intrado has a Scribe Connector in the Marketplace or what Scribe calls a Managed Connector. Clients looking to use the Intrado Studio connector must request access to it. For clients who have multiple organizations that want to use the Intrado connector, they will need to ensure that Intrado is aware of the organization numbers they wish to use it with/on as is the case with many additional applications.

## Scribe Data Flow

- Source applications
  - 3<sup>rd</sup> Party Registration Application
  - Intrado Virtual Event Platform
- Authentication Credentials
  - Intrado secure API (Scribe specific)
  - 3<sup>rd</sup> Party Client Supplied Authentication Elements (Example: Endpoint, Client ID, Client Secret)
- Data transfer execution which can be manual for a one-time execution or can be configured as a scheduled execution and normally runs once a day for outbound and much more often (every 10 minutes) for inbound data exchanges.

## Scribe Methods Leveraged by Intrado

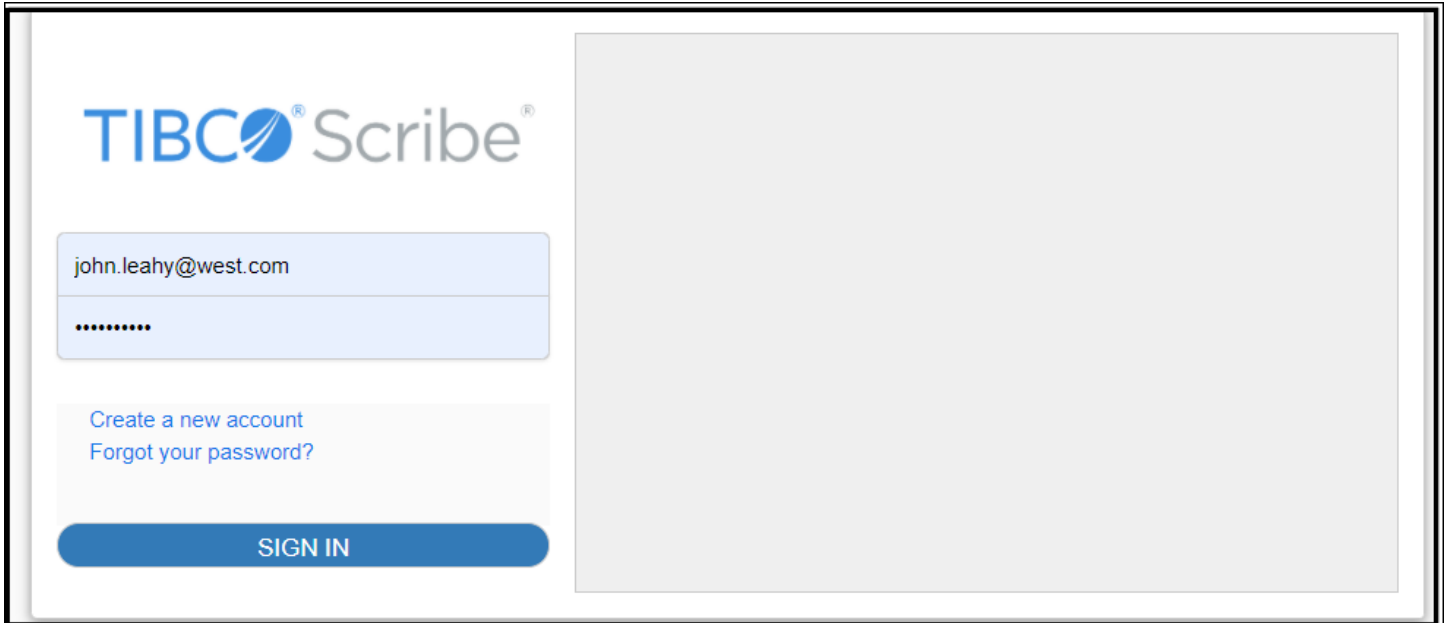
- Inbound Registration – Attendee type creation and Registration Package/Add-on logic
  - When using Scribe to integrate a 3<sup>rd</sup> party registration system, there is logic that needs to be defined to correctly assign the attendee types and registration packages. Note: Standard integration supports single types.
- Inbound User-Specific Opt-In – Agenda Builder
  - When using Scribe to integrate a 3<sup>rd</sup> party registration system, logic can be defined to add presentations selected during registration to populate the Show Planner (Agenda). Note: Non-standard integration logic is required.
- Outbound Profile Updates – User profile updates to Lead/Contact record
  - Scribe can integrate to 3<sup>rd</sup> party applications; logic can be defined to update 3<sup>rd</sup> party Marketing Automation applications with Intrado user values populated by the user. Note: Standard leverages single update rule; Non-standard may use conditional rules.
- Outbound Activity Transfers – User activity data – Attendance/Session Views
  - Scribe can integrate to 3<sup>rd</sup> party applications; logic can be defined to update 3<sup>rd</sup> party Marketing Automation applications with Intrado user activities performed by the user. Note: Standard leverages single update; Non-standard uses conditional logic.

### Notes:

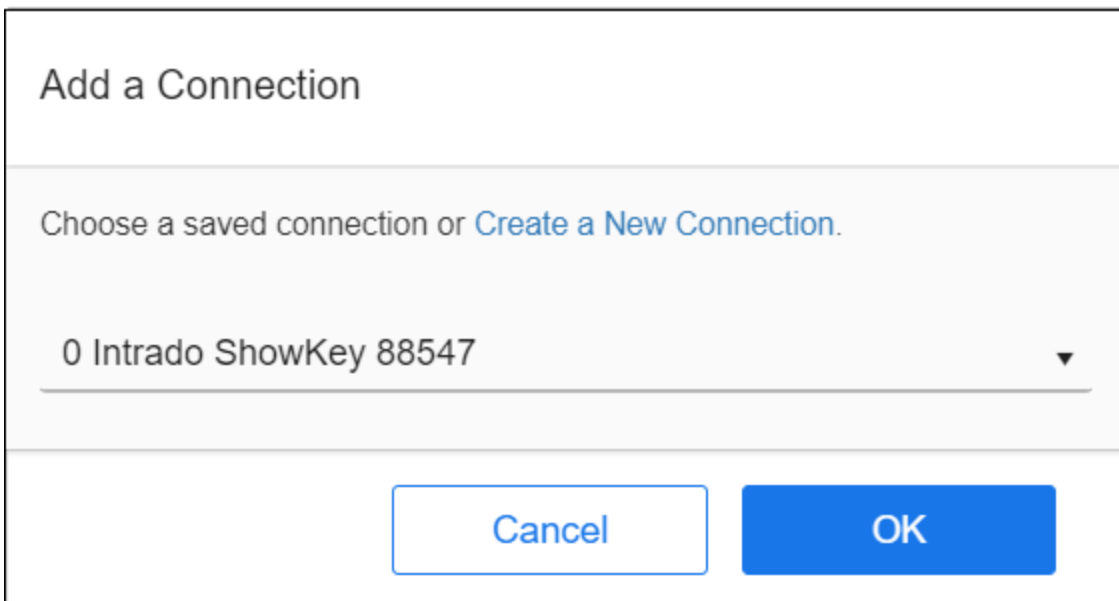
- Only 3<sup>rd</sup> party applications that have a Scribe Connector available in the Marketplace are available to integrate.
- There are two deployments of these integrations; the first is a standard deployment where fields are mapped one to one with no conditional rules. This deployment has a one-time per deployment fee. The second is a custom deployment where conditional rules such as “If this THEN that” are applied. This deployment has both the one-time deployment fee as well as a fee for the time required to create the conditional rules which will vary by deployment.

## Scribe Authentication

- Scribe is a TIBCO application that requires a unique login ID and password to access the Scribe organizations specific to Intrado. This is applicable to clients who will use the Intrado Studio connector (cloud version). If Intrado is building the Scribe scripts for the client, every organization is partitioned off and is independently run/controlled/gated by a Scribe login page.



- Scribe Solutions are defined within the Intrado organizations for each client/ShowKey.



## Scribe Configuration

Scribe configuration settings:

- Scribe Credentials – Note: Intrado organization credentials are managed by Intrado.
- API Credentials – Scribe-enabled
  - To use attendee functions (create, register, add agenda), the user authorization must be enabled.
- Solution Mappings – Field-to-field
- Scribe Solution – Program logic
  - Simple – One size fits all
  - Complex – Conditional logic

Note: The API Credentials for the Intrado tenant need to be activated for Scribe – “this is done by a request to the Intrado Solution Team”.

## Scribe Credentials – Intrado API

A Connection needs to be created to connect to the Intrado tenant using Scribe-enabled Auth Credentials

Edit Connection (Intrado QA)

**Connector Type**  
INXPO Distributed by INXPO

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**Name** **Alias**  
Intrado QA IntradoQA

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**Server** Select value... ?

**APIUserAuthCode**

**APIUserCredentials**

**INXPO Admin User Key**

**Distributed By** INXPO © 2018 All rights reserved

**Test the connection on this agent**  
DC1-SCRIBE Agent Running **TEST**

Cancel **OK**

## Scribe Credentials – 3<sup>rd</sup> Party Application

A Connection needs to be created to connect to the 3<sup>rd</sup> Party application using Authorization Credentials (ID/Password) and 3<sup>rd</sup> Party Client Supplied Authentication Elements are required. (Example: Endpoint, Client ID, Client Secret)

### Edit Connection (Hubspot)

**Connector Type**  
HubSpot Distributed by TIBCO Software, Inc.

Name	Alias
Hubspot	Hubspot

**Account Number**  ?

Authentication launched. Waiting for confirmation... CANCEL

**Test the connection on this agent**

DC1-SCRIBE Agent ✓ Running TEST

Cancel OK

## Scribe Mappings

Source application available fields are identified in the source application.



Create Block Properties

General Fields Error Handling 0 Errors, 0 Warnings

Source Connection Stage SK 27704

Target Connection 042 to SAMPLE.CSV

Select All Clear Autolink  Skip Mapping If Null

Field Name ↑	Type	Formula
▼ IntradoStudioDataIntegration		
AchievementBadgeList	system.string	
Address1	system.string	
Address2	system.string	
Address3	system.string	
AffiliateData	system.string	
AffiliateKey	system.string	
AOLIMID	system.string	
AttendedCount	system.string	
AttendedFirst	system.string	
AttendedLast	system.string	
▼ NewEntity		
a	String(255)	IntradoStudioDataIntegration.EmailAddress
b	String(255)	IntradoStudioDataIntegration.AttendedCount
c	String(255)	IntradoStudioDataIntegration.RegistrationDate
d	String(255)	IntradoStudioDataIntegration.AffiliateData
e	String(255)	
f	String(255)	
g	String(255)	
h	String(255)	
i	String(255)	
j	String(255)	

Cancel Validate OK



Target application available fields are identified in the target application.

## Scribe Logic

Scribe Logic is defined as a Map that leverages the available source and target mapping fields defined to:

- User Creation – Attendee Type Assignment
- Registration – Package/Add-On Assignment
- Presentation Opt-In – Agenda Builder

Example of layered Scribe Logic:

The screenshot displays the Scribe Logic configuration interface. On the left, there are two panels: 'Controls' and 'Stage SK 27704'. The 'Controls' panel contains various logic blocks such as 'Continue', 'Comment', 'For Each Child', 'For Each Result', 'Group', 'If Else', 'Loop', 'Loop Exit', and 'Map Exit'. The 'Stage SK 27704' panel contains blocks for 'Create', 'Fetch', 'Forget', 'Lookup', 'Query', 'Remove', 'Update', and 'Update/Insert'. Below these is a section for '042 to SAMPLE.CSV' with a 'Create' block. The main workspace shows a flowchart with the following blocks: 'Query IntradoStudioDataIntegration', 'For Each Result', 'Create NewEntity', and 'Repeat'. On the right, the 'Properties' panel is open, showing details for the selected 'Query IntradoStudioDataIntegration' block, including 'Block Label', 'Block Name', and 'Entity'.

## Scribe Testing

- To successfully test and validate that Scribe has been configured correctly, the following test practices need to be performed by the event host and Intrado service teams:
  - Validate that the Intrado user has been created correctly with the valid attributes.
  - Validate that the attributes as assigned properly configure the expected user journey.
  - Define exception handling processes for any user integration that produces an error.
- Upon completion of the Scribe mapping configuration in Intrado, the users that are created and registered in Intrado need to be tested for profile information and content access. This may include updating a test status flag.
- If Agenda Building integration is included, the user selections need to be validated in the platform.
- When sending user profile information and activity updates back to the 3<sup>rd</sup> party application, the event host/marketing teams need to validate that all data being passed over is correctly populated and accurate.

Note: Testing is the MOST important component of a Scribe integration. All validation and acceptance should be received from the event host before fully executing the Scribe solution for all user records.

## 3<sup>rd</sup> Party Platform Integration

The below integrations are the types most familiar to Intrado but is not an exhaustive list.

### HubSpot

#### Features

For this integration, Intrado hosts registration. On a daily basis, new/updated data is sent to HubSpot.

- Each Intrado registrant is verified in HubSpot Contacts.
  - If not found, a new Contact is created with Intrado profile fields mapped to Contact fields.
  - If found, an existing Contact may have fields updated. Those fields, if any, are determined by the customer.
- A HubSpot Static List is a collection of Contacts, and a particular Contact may be a member of 0, 1, or multiple lists. The integration design is that each Intrado ShowKey will have two HubSpot Lists. To emphasize this point, these are not dynamic lists, they are static.
  - One List for the registrants.
  - A second List for the registrants who attend.

#### Variations

- A third system may host registration and call Intrado's User API to send registrant profiles to Intrado, and also to HubSpot. In this case, the integration from Intrado would only add those who attended to the second HubSpot List.
- Additionally, there can be a HubSpot List for each presentation within a virtual event. An Intrado administrator can populate the HubSpot List identifier within each presentation EventCode field. Within the Intrado Scribe connector, there is a field that is a delimited list of these codes that each registrant viewed. EventCodes is the field within the connector, and Scribe can parse the values, and then assign Contacts to lists for those they each view.

#### Connectivity

The Scribe connector for HubSpot requires API access to Contacts and Lists. Fields prompted for setup:

1. Account Number > OAuth-prompted for:
2. Email Address
3. Password



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## Pardot

### Features

For this integration, Intrado hosts registration. On a scheduled basis, new/updated data is sent via Scribe to Pardot:

- Each Intrado registrant is authenticated in Pardot Prospects. (If statements are viewed as non-standard)
  - If not found, a new Prospect is created with Intrado mappable profile fields used to update to Prospect fields.
  - If found, an existing Prospect may have fields updated. Those fields, if any, are determined by the customer.
- A Pardot List is a collection of Prospects, and a particular Prospect may be a member of 0, 1, or multiple Lists. The integration design is that each Intrado ShowKey will have two Pardot Lists.
  - A List for the registrants.
  - Another List for the registrants who attended (Live or On-Demand).

### Variations

- A third system may host registration and call Intrado's User API to send registrant profiles to Intrado, and also to Pardot. In this case, the integration from Intrado would only add those who attended to the second Pardot List, if required.
- Additionally, there can be a Pardot List for each presentation within a virtual event. An Intrado administrator can populate the Pardot List identifier within each presentation EventCode field. Within the Intrado Scribe connector, there is a field that is a delimited list of these codes that each registrant viewed. EventCodes is the field within the connector, and Scribe can parse the values, and then assign Prospects to lists for those they each view.

### Connectivity

The Scribe connector for Pardot requires API access to Prospects and Lists. Fields prompted for setup:

1. Email address
2. Password
3. API User Key

## Salesforce

### Features:

For this integration, Intrado hosts registration. On a daily basis, new/updated data is sent to Salesforce:

- Each Intrado registrant is authenticated in Salesforce Contacts via their email address.
  - If found, the existing Contact may have fields updated. Those fields, if any, are determined by the customer.
  - If not found, looked-up in Salesforce Leads via their email address.
    - If found, the existing Lead may have fields updated. Those fields, if any, are determined by the customer.
    - If not found, a new Lead is created with Intrado profile fields that get mapped to Lead fields.
- A Salesforce Campaign is a collection of Contacts/Leads, and a particular Contact/Lead may be a member of 0, 1, or multiple Campaigns. When a Contact/Lead is a member of a Campaign, they must be assigned one Status. The available Statuses for membership are determined by the customer, and we recommend Registered and Attended. The integration can set each Contact/Lead Campaign membership status accordingly.

### Variations:

- Some customers prefer to split membership status “Attended” into three groups and Intrado can accommodate.
  - Attended Live
  - Attended OnDemand
  - Attended Live and OnDemand
- A third system may host registration and call Intrado’s User API to send registrant profiles to Intrado, and also to Salesforce. In this case, the integration from Intrado would only change those Contacts/Leads who attended, to an Attended Campaign membership status.
- A Salesforce administrator may choose to add custom fields to the entity Campaign Membership. In addition to a Contact/Lead being a member with a Status, there can be an additional field(s) such as:
  - Minutes Viewed Live
  - Minutes Viewed OnDemand
  - Questions Asked of Speaker
  - Lead Rating = Hot/Warm/Cold
    - Considered custom work, the formulae can sometimes be accommodated based on fields available from the Intrado connector. Some factors to consider may be Minutes Viewed threshold, Poll Response Count, Documents Accessed Count, and even particular answers to Survey questions such as “Would you recommend this webinar to a colleague?”.
- Additionally, there can be a Salesforce Campaign for each presentation within a virtual event. An Intrado administrator can populate the Salesforce Campaign ID within each presentation EventCode field. Within the Intrado Scribe connector, there is a field that is a delimited list of these codes that each registrant viewed. EventCodes is the field within the connector, and Scribe can parse the values, and then assign Contacts/Leads to Campaigns for those they each view.

### Connectivity:

The Scribe connector for Salesforce requires API access to Contacts, Lists, Campaigns, and Campaign Memberships. Fields prompted for setup:

1. Salesforce URL
  - a. Typically: <https://login.salesforce.com/services/Soap/u/47.0>
  - b. If testing, the URL may be: <https://test.salesforce.com/services/Soap/u/47.0>
2. User
3. Password
4. Security Token

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## CSV File to/from FTP

### Features

This option is considered custom and scoped for effort. Some customers have a system without a stock integration with Intrado or perhaps the customer does not want to give API access to Intrado via Scribe. Occasionally, the customer can import/export a CSV file from their system(s). Columns need to be agreed-upon by Intrado and the customer.

### Import

On a daily basis, incremental updates to data about registrants and attendees can be generated to a CSV file upon an FTP site of a customer.

### Export

With some frequency such as hourly, user profiles can be imported and registered into Intrado from a CSV file on a customer FTP site.

### Connectivity

The Scribe connector for FTP requires:

1. URL of FTP, FTPS, or SFTP
2. ID
3. Password

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## Cvent

### Features

Via Scribe, Intrado can integrate with Cvent's Core product. In some cases, clients leverage Cvent's Conference product which is not currently accessible to the Scribe integration connector. Cvent should be contacted for more information.

### Registration

- Cvent has two identifiers for an Event, the Event ID and Event Code. These are the counterparts to an Intrado ShowKey identifier. For this integration, Cvent hosts registration. Every 10-15 minutes, Scribe will ask Cvent if a given Event has any new/change registrations since the last time Scribe asked. If any are found, Scribe will push those registrant profiles to a given Intrado ShowKey.
- Mapping of registrant profile fields from Cvent should be well-defined, as well as their destinations within Intrado. For example, Cvent sources to date have included Registrations, Contacts, Event Surveys, Guest Details, and Order Details. Destinations in Intrado have been stock profile fields, event survey responses, and user-defined fields (UDFs).
- Additionally, Cvent registration can be complex. This may then dictate the complexity of Intrado setup, such as multiple Attendee Types, Registration Packages, and/or Registration Package Add-Ons.
- Cvent guest passes can be accommodated with the integration.
- Cvent canceled registrations can be accommodated with the integration.
- User Password – Note: when using Single Sign On (SSO) to login to Intrado events, we strongly suggest not setting the password and allowing our system to auto-generate one. This protects the login by having an unknown password. That password is ignored for SSO logins. The User Password may either be not required, set to the Cvent registration confirmation code, or in rare cases, set to a fixed string of the customer's choosing.

### Agenda

- Some customers implement a Session Agenda in Cvent for a virtual event. Along with the above registration data, these can be integrated into the Intrado Session Agenda in a timely manner.

### Attended Event

- Each Cvent registration has a checkbox labeled Participated. Daily, Intrado can integrate to Cvent and check this box for those registrants who had logged into the event.

### Viewed Presentations

- There can be a Cvent session for each presentation within a virtual event. An Intrado administrator can populate the Cvent Session identifier within each presentation EventCode field. Within the Intrado Scribe connector, there is a field that is a delimited list of these codes that each registrant viewed. EventCodes is the name of the field within the connector, and daily, Scribe can parse the values and flag the Session/Registrant combinations appropriately for those viewed.

(continued)

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## Variations

A customer may request data to be integrated to Marketo, Eloqua, Salesforce, or another third-party software system. This should be discussed during the Technical Kickoff Meeting with both Cvent and Intrado, and the teams can determine the best approach and which system should set up the integration.

## Connectivity

The Scribe connector for Cvent requires API access to Events, Registrations, and Contacts. Depending on the Cvent registration configuration, occasionally, Event Surveys, Guest Details, and Order Details may be required. Fields prompted for setup:

1. API URL, typically <https://api.cvent.com/soap/V200611.ASMX?WSDL>
2. Account Number
3. API User
4. API Password