AEC Daily EventStream — Overview

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This document provides an overview of how AEC Daily EventStream integrates event files from the AEC Daily website (https://www.aecdaily.com) and AEC Daily Learning Portals, with customers' CRM (Customer Relationship Management) or BI (Business Intelligence) systems.

AEC Daily EventStream is a paid service and can be initiated by visiting https://stats.aecdaily.com/-integration. AEC Daily customers that subscribe to this service are referred to as **subscribers** in this document.

This system is designed to provide flexibility in order to meet the needs of different subscribers, with various CRM or BI systems, with varying security and access requirements.

In this document, we refer to a subscriber's CRM or BI system as the "subscriber's system".

1 Overview

The AEC Daily website and AEC Daily Learning Portals generate and records *events*. Event data related to the subscriber is made available JSON-formatted files, one file per event.

Events of possible interest to specific subscribers are selected from the event stream for further consideration, and saved in a per-subscriber *pending* state.

Periodically, pending events are translated and transformed as required for the subscriber, and saved in the *ready* state.

Ready events are applied or transmitted to the subscriber's system, possibly in multiple steps.

Once applied, ready events are archived in the *sent* state.

This approach provides:

- Reliability
  - Each step of the process is logged and monitored
- Resiliency
  - Errors, including transient errors, can be caught at any step, and the corresponding events retained for correction

– If the remote system is unavailable, ready events will be re-tried during the next processing loop
- Repeatability
    – Events can be re-run from any stage if desired
    – e.g. Events applied against a sandbox can be re-applied against a production system
- Scalability
    – Multiple workers can feed events to remote subscriber's systems

2   Subscriber System Workflow

It is important to recognize that CRM/BI workflow and decision making happens inside the subscriber's system. AEC Daily provides basic data — the subscriber then defines and implements business processes based on that data.

Subscribers may create campaigns, assign sales representatives or territories (or any number of other actions) once the data is inside their system.

It is not feasible or supportable for AEC Daily to attempt to implement business processes or decision making on the subscriber's behalf.

3   Events and Event Types

Multiple event types are currently generated by the AEC Daily websites and Learning Portals. AEC Daily expects that more will be added in the future. Refer to the document "AEC Daily EventStream: Event Details" for detailed event file information.

4   Translations and Transformations

As part of moving an event from the pending state to the ready state, translations and transformations can be applied.

These can include:

- Standard translations from internal field names to more common field names for external use
- Standard translations that are typical for the subscriber's system
- Subscriber specific translations and transformations to conform to specific requirements
- Sending an event, or portions of an event, to more than one destination, in order

Translations and transformations can only be made based on the data in a single event. For example, AEC Daily is unable to alter the processing of an event based on previous events, such as the number of courses already completed by a user.

5   Local / Remote Identifier Mapping

It is necessary to be able to map AEC Daily's unique user identifier to the unique identifier used in a subscriber's system.

It is important to understand that AEC Daily will not map all of a subscriber's existing CRM/BI contact or lead records to our database of users, but rather as AEC Daily creates data, a "record ID" will be applied as the primary identifier.

One might consider using email address as the identifier, however that can change over time, and the change could be recorded in the AEC Daily system, the subscriber's system, or both. Accordingly, most systems have a user or contact ID that is constant and unique over time.

AEC Daily maintains a database which maps between those unique identifiers to ensure we can consistently track specific learners in various systems.

6   Subscriber System Application

AEC Daily can provide events for a subscriber's system in several different ways:

- Event file transfer to subscriber for processing by the subscriber via:
    - Tokenized link to a weekly aggregate event file .zip, delivered automatically via email[1]
    - Push (put) to subscriber server via SFTP[2]
    - Pull (get) by subscriber server via SFTP[2]
    - HTTP (put) to subscriber server via HTTPS

It is highly reccomended that subscribers accept/take the unaltered event files, and then apply/process those internally in the way that makes the most sense for the subscriber. It is not feasible for AEC Daily to attempt to implement and update non-trivial decision or business processes.

Refer to the document "AEC Daily EventStream: Event Details" for detailed event file information.

7   Supported Systems

Using file transfer-based updates, the subscriber can of course make use of their choice of CRM/BI system.

Contact tech@aecdaily.com to discuss API support, or other integration-related questions.

8   Additional Information

If you require additional information, or have any questions, please contact tech@aecdaily.com.

Other related documents include:

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[1] Tokenized links are sent via email to an email address (specified by the subscriber).
[2] SFTP access is controlled via SSH public keys

- AEC Daily EventStream: Event Details
- AEC Daily EventStream: Terms of Use