Recollective Integration Options

From custom participant on-boarding to connecting Recollective to third-party platforms, this article explores the many integration options available in Recollective.

recollective

Integrating With Recollective

Recollective is capable of integrating with other platforms through our Single Sign-On (SSO) and Webhook tools. Depending on what you're trying to accomplish, we can communicate directly to other tools you might be thinking of using! With that in mind, this article will cover different examples of direct integrations with Recollective.

This article explains some of the tools in Recollective used in integrations. Those include:

1. Participant Profiles
2. Single Sign-On API
3. Webhook System

The article also includes some examples to illustrate what is possible when integrating external systems with Recollective. Those examples include:

a. Recruiting / Panel Integration
b. Secured External Single Sign-On
c. Survey Integration
d. Custom Embedding

Participant Onboarding

All participant accounts have an unlimited amount of customizable data parameters that can be attached. Within the Recollective ecosystem, these parameters can be classified as the following:

Personal Profile Information

- First Name
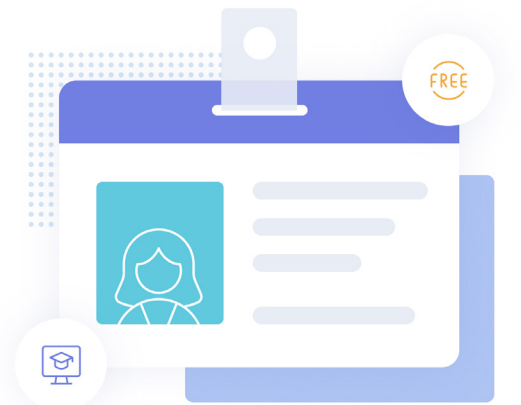
- Last Name

- Email Address

- Username

- External ID

Custom Profile Information

Basic & Smart Segmentation: Binary information tags to control study content visibility and comparative analysis

Profile Fields: Custom embedded data fields that store non-binary information directly to a participant's profile. These data values include any of the following data formats:

Single / Multiple Choice Polls

- Plain Text

- Formatted Text

- Numeric

- Date

- Timestamp

- Video

Participant Study Data

There are additional study specific values that can be dynamically passed when the necessary events occur. These include specific studies, activities, tasks, or even discussion topic events.

With the exception of the **Basic & Smart Segmentation** or the **Video Profile** field, all of the data parameters listed above are dynamically available for use with an external integration. When setup correctly, you can have any of this information carried to a custom destination point automatically via web query strings.

Single Sign-On API

Recollective is capable of allowing the authorized creation or updating of participant accounts from an external system. A unique SSO login link with a security signature will be generated for each user allowing you to create accounts that directly correlate with other platforms or tools you intend on using as part of your project workflow.

Depending on the complexity of the external system, additional data can be carried over in conjunction with the initial account creation or account updating action. This includes carrying data to any one of the following parameters:

- Personal Profile Information

- Basic binary segmentation

- Profile Fields (with the exception of video)

For example, many admins will migrate data via a bulk Excel / CSV file upload into our system. While this is easily the most common methods of appending detailed demographic data onto a participant profile, it involves lengthy, error prone work at con-solidating data into a compatible spreadsheet.

Using our Single Sign-On approach, one can avoid these same issues by automating the system to programmatically migrate user data dynamically through the use of an external survey platform integration with Recollective.

Webhook System

A webhook is a way for an application to provide other external applications with real-time information. As events occur within the origin platform, the external application is passed the applicable information immediately.

In the context of Recollective, we provide the ability for you to pass **participant information** in the form of basic URL callbacks to custom web addresses. As soon as Recollective specific events occur, our system will queue the respective communication jobs and execute them securely via a server-side call.

The process of handling the automatic communications is entirely handled via predefined events that are Recollective specific. For example, some of the events specific to a participant include:

- Successful screening

- Failed screening

- Exceeded the study / segmentation quota

- Activity Completion

- Discussion posts

- Site visitation

If any of these events occur, Recollective will issue a server-side communication to whichever custom defined URL destination is associated with the event rule.

Site Log

Given the complexity of our Single Sign-On API, the external Webhook system, and the prevalence of data migration via standard participant bulk imports, Recollective also includes a robust Site Logging tool to track and diagnose any possible issues related to the actions above. All actions that leverage our panelist system and the participant data associated with it is logged and categorized with a success / warning / failure label. For context, these are some of the uses for the site log respective to each tool:

Single Sign-On account creation / updates

Each SSO attempt is timestamped and logged. Within each logged event, a unique identifier is carried over, along with an indicator of what data parameters were included.

Bulk Import actions

All admin uploaded bulk import files are timestamped and logged for reference. A full list of every participant and their respective values is included.

Webhook Events

Every external webhook communication event is logged, along with the return state. Accessing this will lead to the full tracking log for any queued or executed webhook communications. As qualified webhook events occur, they'll be listed in this page along with a communication state.

Single Sign-On Security

To be secure, SSO Login URL's must be tamper-proof. Any attempt to change the content of the URL by an end user must be detected by Recollective. Since the URL will authenticate the user, it must also expire. Security is provided by a cryptographic signature you will generate with an API password. Recollective provides a utility for learning and experimenting with the API endpoints.

Recollective Recruiting Scenarios

Now that you're familiar with the integration tools available, what are some of the typical scenarios that you can take advantage of or use in your project workflow? Below are some of the most common use cases when integrating directly with Recollective.

Recruiting / Panel Integration

Most recruitment or panel provisioning services have a quantitative survey platform to handle the initial screening of participants. Using the redirection and query string mechanics in the quantitative survey platform in combination with Recollective's Single Sign-On API, any qualified participants can be directly sent to Recollective for active account creation.

On larger more robust projects, this will likely include the passing of numerous profile and segmentation parameters directly onto each participant account. This is highly valuable in that it allows a panel provider / recruiter to accomplish the following when working with Recollective:

1. The immediate creation of participant accounts in Recollective after a successful / qualified sreening from the external survey platform.

2. The passing of additional participant information parameters to Recollective, that were collected on the external survey platform.

3. A communication of participant registration status back to the external survey platform.

Secured External Single Sign-On

In certain cases, there may be a need to have an external platform act as the authenticated login portal for access to a Recollective site. Using the secured Single Sign-On method to connect to another system, one can effectively disable native access to a Recollective site through the traditional Recollective login screen. All users (participants and admins) would be required to gain secured and authenticated access to the approved external platform, before being connected to their associated Recollective account.

Survey Integration

In situations where you'd like to pair alternative research tools or platforms with Recollective, we have the native capability within the platform to redirect users to your web-based tool.

Using any of the described participant information parameters listed in the Participant Profile section, we can dynamically redirect your participants and pass that information directly to the other platform via our Prompt tool. As long as you're carrying over a common ID value across to the other system, you'll be able to correlate the responses with the participants on Recollective.

Custom Embedding

We allow the use of custom embedding via HTML iframes. Provided you're doing this on pages within Recollective that support our Rich Text Editor, you'll be able to directly embed other tools or platforms directly into our interface.

For example, here's a list of some common and notable HTML embedding examples:

Recollective Home Page

- Live Twitter feeds
- Live RSS / news feeds
- Interactive geographical maps
- External live surveys / polls
- External photo & video galleries

Activity / Task / Discussions / Screening Questions

- Proprietary secured video stimulus
- 3D image stimulus
- VR touring stimulus
- Podcasts or 3rd party audio players

If there are any other tools you're looking to embed in your Recollective project, go ahead and contact us and we'll confirm if it's possible!

Contact Us

Email: helpdesk@recollective.com

Or swing by for a coffee at:

300-100 Queen Street, Ottawa,

Ontario, K1P 1J9, Canada

About Us

Recollective is an award-winning software developer focused on marketing research and online communities. For over 20 years, we've worked with some of the world's largest and most ambitious organizations, continuously innovating our software and services as their requirements evolve. The result is a proven software platform that businesses depend on to meet their most critical needs–quickly, easily, securely and affordably.