

# INTEGRATION



## INTEGRATION POSSIBILITIES

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[www.terapage.ai](http://www.terapage.ai)

## Integrating with Terapage

Terapage has the ability to combine with other platforms using our Single Sign-On (SSO) and Webhook tools. Based on your objectives, we can get in touch with other tools you might be tempted to use. Taking that into account, this report will cover different types of direct integrations with Terapage. For a detailed API documentation, please visit: [www.api.terapage.ai](http://www.api.terapage.ai)

This report explains some of the tools in Terapage used in combinations. Those are:

1. Participant profiles
2. Single Sign-On (SSO) API
3. Webhook Events System

The report also comprises some samples to show what is possible when combining outside systems with Terapage. Those samples include:

- a) Participants Recruitment &Users Integration
- b) Secured External Single Sign-On (SSO)
- c) Integration of Surveys & Polls
- d) Custom Embedding

### Onboarding Research Participants

All participant accounts have an endless amount of manipulatable data framework that can be affixed. In the Terapage ecosystem, these frameworks can be categorized as the following:

#### Profile Information

- First Name
- Last Name
- Email Address
- Username
- External ID

## Customizing Profile Information

**Standard & Enhanced Grouping:** Binary data tags to sway study content visibility and comparative analysis.

**Profile Fields:** Custom implanted information fields that stock non-binary data directly to a participant's profile. These information values are inclusive of the following data layouts:

### Single and Multiple Choice Surveys & Polls

- Unformatted text
- Formatted text
- Numeric
- Date Timestamp
- Recordings

## Participant Study Information

There are extra study specific principles that can be dynamically passed along when the inevitable events happen. These are specific studies, activities, duties, or even discussion subject events.

Apart from Basic & Smart Segmentation or the Video Profile areas, all of the data values specified above are dynamically obtainable for use with outside integration. When put up right, you can access all this data carried to a custom destination point without volition via web query strings.

## Single Sign-On (SSO) API

Terapage can permit the authorized making or updating of participant accounts from an outside system. A distinctive SSO login link with a security signature will be created for each customer authorizing you to make accounts that openly correspond with other platforms or tools you plan to use as part of your project workflow.

Conditional to the ambiguity of the outside system, more information can be transported over with the primary account opening or account updating activity. This includes transporting information to any of the following framework:

- Personal Profile Information
- Basic binary segmentation
- Profile Fields (with the exception of video)

For instance, many admins will move information through a heavy Excel/CSV file upload into our system. Although this is arguably the most usual way of appending detailed demographic information onto a participant profile, it is long and mistake prone work at consolidating information into a compatible spreadsheet.

Using our Single Sign-On method, one can steer clear of these same issues by automating the system to programmatically move user information dynamically through the use of an outside survey platform integration with Terapage.

## Webhook Events System

A webhook is a method of an application to give other outside applications with actual particulars. As events happen within the initial platform, the outside application is given the applicable particulars instantly.

In the circumstance of Terapage, we give the capacity for you to relay “Participant Information” as basic URL callbacks to custom web addresses. Immediately Terapage particular events happen, our system will line the corresponding communication operations and handle them discretely via a server-side call.

The procedure of executing the automatic communications is totally executed by predefined events that are tailored to Terapage. For instance, some of events tailored to a participant include:

- Successful screening
- Unsuccessful screening
- Study participants grouping / Exceeding the quota limit allowed
- Completion of activities
- Posts made to ongoing discussion
- User visitation of site

When any of these occur, Terapage will give out a server-side transmission to whichever custom defined URL destination is affiliated with the event rule.

## Site Log

Given the ambiguity of our Single Sign-On API, the external webhook system, and the commonness of data movement through standard participant bulk imports, Terapage also incorporates a robust Site Logging tool to trace and solve any possible matters related to the measures above. All measures that influence our panelist system and participant data associated with it is noted and marked with success/warning/failure label. For this environment, these are some of the applications for the site log in regards to each tool:

### Single Sign-On account creation & edits

Each SSO effort is timestamped and noted. Within every noted event, a distinctive identifier is carried over, together with an index of what data framework were included.

### Bulk Import actions

All admin data transfer bulk import files are timestamped and noted for testimonials. A full catalogue of every participant and their respective principles is included.

### Webhook Events

Every outside webhook communication is noted, together with the state of return. Gaining access to this will lead to total tracing log for any lined or handled webhook communications. As qualified webhook events happen, they'll be noted down on this page together with the communication state.

### Single Sign-On (SSO) Security

For security, SSO Login URL's have to be shielded. Any efforts to tamper with the subject of the URL by an end participant must be discovered by Terapage. Since the URL will validate the participant, it must also run out. Security is given by cryptographic signature you will generate with an API password. Terapage gives a utility for studying and testing with the API endpoints.

## Terapage Participants Recruitment Workflow

Given that you now have the knowledge of the integration tools obtainable, what are some of the classical scripts that you can exploit or use in your project workflow? Here are examples of most usual usage of such cases when integrating directly with Terapage.

### Participant Recruitment & User Integration

Most hiring or panel provisioning facilities have an investigative platform to take care of the screening of participants. Using the redirection and query string mechanics in the investigative platform together with Terapage's Single Sign-On API, certified participants can be sent straight to Terapage for making of active accounts.

On huge more vigorous projects, this will likely include the handing over of many profiles and segmentation framework straight onto each participant account. This is precious since it enables a panel provider/ enlister to achieve the following when dealing with Terapage:

1. The instant creation of participant accounts in Terapage after a successful/completed screening from an external polls and survey platform.
2. The relay of information about participants to Terapage, that was gathered from an external polls and survey platform.
3. A communication of participant registration status back to the external polls and survey platform.

### Secured External Single Sign-On

In various instances, it may be necessary to have an outside platform act as the validated login portal for entry into Terapage site. Using the protected Single Sign-On method to join with another system, one can successfully get rid of native access to a Terapage site through the normal Terapage login screen. All participants would be needed to attain secured and validated entry to the accepted outside platform, and then joined with their respective accounts.

## Polls and Survey Integration

In instances where you need to combine other research tools with Terapage, we possess the normal ability in the platform to divert participants to your web-based tool.

Through either of the explained participant information frameworks that are in the Participant Profile section, we can divert your participants and hand over that data straight to the other platform through our Prompt tool. Depending on you bearing the common ID value to the other system, you will be allowed to match up the feedback with the participants on Terapage.

## Customized Embedding

We permit usage of custom embedding through HTML iframes. As long as this is carried out on pages within Terapage that sustain our Rich Text Editor, you can directly embed other tools or platforms straight into our interface.

For example, here's a notation of some usual and widely known HTML embedding samples:

### Terapage Home Page

- Realtime Twitter feeds
- Realtime RSS/news feeds
- Interactive geographical maps
- External actual surveys/polls
- External photo and video exhibitions

### Activity/Task/Discussions/Screening Questions

- Video stimulus
- 3D photo stimulus
- VR touring stimulus
- Podcasts or external audio players

## Planning Your Integrations with Terapage

To enable us understand how you plan to integrate with Terapage and ensure that we are fully aligned, we do require you to produce a technical integrations specifications document. This document can be brief and structured as you desire. However, based on our experience with existing API clients, we have put together a model structure of what you might consider as the contents of such a document.

Please note that this integrations specification structure is just a rough suggestion of what a typical integrations specification document should contain. We have kept it simple to the very minimum structure. Please feel free to develop yours as detailed and informative as possible.

### Tell us about the system integrating with Terapage API

- Overview of the system/website/app integrating with Terapage API. [This can be information about the system, technology stack, customer or broker facing, frequency of transactions per seconds/minute/hour, any existing integrations]

### Tell us about the user journey and flows

- Describe the project creation and completion user journey. [A flow chart might be useful to support the explanation]
- Describe the activity creation and completion user journey. [A flow chart might be useful to support the explanation]
- Describe the task creation and completion user journey. [A flow chart might be useful to support the explanation]
- Describe the participant invitation and profiling user journey. [A flow chart might be useful to support the explanation]
- Describe the user journey for updating participants and other users details. [A flow chart might be useful to support the explanation]
- Describe the settings user journey. [A flow chart might be useful to support the explanation]
- Describe any other user journey that we should know about. [A flow chart might be useful to support the explanation]

## Tell us more about the integrations with Terapage API

- What type of research project would be created via the API?
- What endpoints would you use? [You can find some of our endpoints on the API documentation: [www.api.terapage.ai](http://www.api.terapage.ai)]
- For each of the endpoints, what would the request look like? Also, what data would you be sending via the API? [This is because we do have a combination of mandatory and optional fields]
- For each of the endpoints, what data within the response would you consume? Also, what data would you be sending via the API? [This is so we know which datapoints are important to you]
- Would you be hardcoding any values? If yes, please specify the fields and the reasons for not making them variable/dynamic.
- Would you be doing any calculations locally? If yes, please specify which and the reasons for calculating values locally instead of consuming what we will send to you.
- Would you be storing a local copy of the data that you retrieve from Terapage API? If yes, please specify which and the reasons for storing a local copy of the data from our API.
- If you will be duplicating any data from Terapage by maintaining a local copy, please tell us about how you plan to ensure that the duplicated copy is kept up to date.

## Tell us about the security of the integrating system

- How would your users get authenticated? [This so we know how your access control mechanism works from your side]
- Would the data that you would be sending to us be encrypted? If yes, what standards?
- Would the data that you would be retrieving from us be encrypted? If yes, what standards?
- What is the TCP/IP in-bound traffic timeout duration for your network? [This is so we can handle potential timeouts properly]
- What is the TCP/IP out-bound traffic timeout duration for your network? [This is so we can handle potential timeouts properly]
- What static IP addresses would you be using for the Sandbox/UAT/Test system? [This is so we can whitelist the IP addresses to enable you gain access to our services]
- What static IP addresses would you be using for the Production/Live system? [This is so we can whitelist the IP addresses to enable you gain access to our services]

### Tell us about the integrations project and timelines

- Tell us about the members of the project team
- Tell us about the contact details. For example, who do we reach out to for technical support queries, product queries, etc.
- What is the tentative UAT date? [A gantt chart might be useful]
- What is the tentative go live date? [A gantt chart might be useful]
- Any other details?

If you want to incorporate additional tools into your Terapage project, get in touch with us and we'll check if it's feasible.

Get in Touch: Email: [contact@terapage.ai](mailto:contact@terapage.ai)