DIY Pre-Launch Checklist

Site Administration

Agreements	☐ Do you have an active agreement? *A TOU or PIC provides your company with assurance about IP rights ownership, acceptable user behaviour and will help comply with international privacy laws.* *Recollective provides an English template for each of these options that are easy to add. These agreements will need to be translated for non-English markets.*
Account Settings	☐ Review the settings and deselect any fields that you don't want modified by the participants. For private studies, we recommend limiting the amount of PII collected. The fields to review are: ● *First Name* ● *Last Name* ● *Email Address* ● *Username* ● *Profile Photo*
Email Notifications	☐ Is the sending email address correct for notifications? ☐ Review the default email notification frequency and modify the times, if necessary. ☐ If you don't want to allow the participants to modify their notification schedule, use the "hide options from participants" menu to limit the selections. ☐ Review the Email Broadcast setting to ensure it's enabled to allow for

	automatic login after an email broadcast is sent.
Site Subscription	☐ Review the Projects phase information to ensure the Participant Access dates look correct. *Participant Access must be live on the site for participants to register an account. If access has not yet started, you can change the start date tied to your subscription.*

Study Settings

Study State	☐ Review the Study State and make sure to change it to the 'Open' status before adding and inviting your participants.
Configuration *This section allows you to control elements of the Study visible to participants and Administrators.*	☐ If there aren't Discussion Topics, we recommend disabling the Discussions tab. ☐ If there are Discussion Topics, review the Discussions options. ☐ Review the **Ratings** options to Allow or Disable ratings. ☐ Review the **Time Zone** option to ensure timezone settings are correct.
Language *This section allows you to control study and participant languages within the Study*	☐ Review which languages will be available in the study, and which languages should be visible to participants. If your desired language is missing from the dropdown, it must be enabled by an Analyst at the site level. ☐ If you've selected multiple participant languages and there will be socialization amongst participants, consider enabling '**View translated responses'** to allow participants to view automatic translations of responses.
Study Objectives *This section allows you to outline the goals of the Study by providing additional information on the **Research Area**, **Target Industry** and **Study Objectives***	☐ Consider filling out the **Study Objectives** field. This is an optional text field where you can outline the specific goals of your study and the insights you hope to gain from your research.

	By providing this information, the Recollective AI can better analyze the data, identifying relevant patterns, themes, and sentiments to generate more meaningful outputs aligned with your study's objectives.
Content Checks *This section allows you to enable **Block Pasting** for all Task responses*	*To promote thoughtful, authentic answers and discourage the use of generative AI or pasted external content in Task responses, consider enabling the Block Pasting feature. This can be done in two ways:* ☐ Apply it broadly by navigating to **Study Admin > Study Settings > Content Checks** ☐ Enable it for individual tasks under Advanced section by checking the **Block pasting of external content** box
Privacy *This section controls how participants are identified in the study. It also controls access to the participant directory and profile pages.*	Review the **Participants Identities** options to select how they appear to each other and what information you want the participants to have access to. *For **private** studies, we strongly recommend disabling participants' access to the Directory, Profile Pages and Photos.* ☐ Review the **Administrator Identities** options to select how you want admins to appear to participants. ☐ Review the **Client - Participants Identities** options to select how you want participants to appear to clients and what information you want clients to have access to about the participants. ☐ Review the **Analysts & Moderators - Participants Identities** to select how you want participants to appear to Analysts & Moderators.
Notifications *This section lets you control which Admins receive email notifications for four types of events in a Study.*	☐ Review who is receiving notifications for each of the listed events The notifications that are sent to admins are: ● When a **New Participant Joins** ● When there are **New Participant Topics** ● When there are **New Private Messages** ● When there is a **New Backroom Comment** ● When a participant uses the **Support Contact** icon on the login page

Points *This allows you to enable gamification features for your Study.*	☐ Review the points settings if you are enabling point tracking

Client Permissions
 	
By default, Client accounts have very limited permissions within a Study. They begin as observers but more permissions can be granted.
	☐ Review Client Permissions
	  ☐ If you have Live Activities, clients will only be permitted to join a Live Video Interview or Group Chat if '**Collaborate in backroom'** is enabled.
	  ☐ If you enable '**Interact with participants'** ensure that you really want your clients leaving comments to participants and/or sending private messages.

Homepage

Published Changes	☐ Publish changes to the Homepage by clicking the '**Publish'** button at the top of the Homepage after your changes. Otherwise, participants will not be able to see those updates.
Cards	☐ Review Homepage Cards *For private studies, we recommend removing the '**Recently Online'** card since it's visible to participants and they won't be interacting during the study.*
Participant Support	☐ Review who participants are contacting for support. *Recollective does not provide direct support to participants. If a participant requires support, they will need to contact an admin who can then reach out to Recollective on their behalf.The admin can then relay any necessary information back to the participant.* *Participant support is available through our*

	Direct Assistance offering. To learn more about this feature, please connect with your Account Manager or reach out to us at saleshelp@recollective.com

Activities

Activity Sequencing	☐ Review [Sequencing Settings](#)
Activity Start & Due Dates	☐ Review All Dates *Ensure the Activity Start/Due dates reflect the Participant Access start/end dates in your Subscription.*
Activity Visibility	☐ Review [Visibility Settings](#)
Response Visibility	☐ Review [Response Sharing](#)
Activity Notifications	☐ Review All Notifications *If the Start/Due dates are the same, we recommend disabling the 'Activity reminder' notification so that the participant doesn't receive the* **'New Activity Available'** *along with the reminder on the same day.*
Journal Type	☐ Review all [Journal Activity Settings](#)

Discussions

Topic Start and End Dates	☐ Review All Dates *Ensure the Topic Start/Due dates reflect the Participant Access start/end dates in your Subscription.*
Topic Settings	☐ Review Topic Settings
Topic Visibility	☐ Review Visibility Settings
Topic Reply Sharing	☐ Review Reply Sharing

Tasks

Additional Commentary	☐ If the text response is required, enable the **'Response required'** option. ☐ Consider customizing the prompt to help guide participants on what question they should respond to.
Conversation Task	☐ Review the Conversation Objective *The conversational AI will only read the context provided in the Task Objective. This means items such as the Task Instructions, attached Stimuli, Study Objectives, or previous Task responses will not be ingested by the conversation AI. Therefore you may consider adding any additional context that will help the AI better understand your objective.*

Fill the Blanks Task	☐ Adjust the size of the blanks to guide participants on the length of response expected of them.
	☐ Ensure that the question field is unique for each blank and identifies the question as this is how it will be identified in transcripts and exports. Click here for an example.
	☐ If the question text is in the blank's question field, consider moving the text from the blank's question field into the response template so that it is directly above the text blank. Doing so will ensure that:
	    ● Once participants start typing in the blank, they are still able to see the question, and
	    ● The resulting data output in the summary tab will include the questions for reference during analysis
	☐ If a blank should be optional, consider disabling 'answer required'.
	☐ If you have a table with 4+ columns, reformat the response template so that the table is removed and the

	blanks are listed vertically. 　● More than 2-3 columns can impact participants' experience on mobile as participants will have to do horizontal scrolling to see the other columns, and older phones may not allow for this. 　● This can also cause difficulty when reviewing tables' responses on the platform as some columns may not be visible. ☐ If you have photo and scale blanks in a table, remove the table and list the blanks vertically because photos and scales are required to be full width within the response template. 　● If they are included in the table, responses for this task cannot be viewed within the platform.
Grid Task	☐ Randomize the presentation of rows to prevent order bias. ☐ If a comment per row is required, enable **'Response commentary'** and then select the **'Response required'** option.
Hyperlinks	☐ If there is a hyperlink that is sending participants to an external website in the questions or instructions, enable the **'Open link in new tab'** option so that participants will automatically have Recollective open in a separate tab to easily navigate between the two sites.
Image Review	☐ If annotations are required enable the **'Allow marker to be annotated'** and **'Annotations are required'** options
Languages	☐ Ensure that the language picker matches the language you are entering content for. *Click here for an example*

	Language pickers are available in the bottom right corner of fields where translations are available.
Multimedia Task	☐ If media descriptions are required, enable the **'Descriptions are required'** option. ☐ If more than one media response is required (i.e., 2-5 Photos, or Photo/Video), enable the **'Limit quantity'** option and set the minimum and/or maximum numbers. ☐ Enable the File Response option ONLY if you're looking for a specific file type, for example, a PDF or PowerPoint, as a response. ● *Otherwise when this is enabled for photo or video responses, participants can upload the photos and videos as a file response but they will be housed separately from photo and video responses and file responses cannot be viewed on the platform.*
Poll Task	☐ Randomize the presentation of the poll choices to prevent order bias. ☐ Review your poll choice data values to ensure they're how you'd like them to appear as these identify a poll choice in charts and exports and have a 25-character limit. ☐ When 'Other and (Specify)' is enabled, use the 'Enforce word count' option and set a minimum number. ● When this is not enabled, participants can complete the task without leaving a response if they choose this option.
Prompt Task	☐ If a prompt task offers good insight, instructions, or welcome messages, we suggest moving this information to a card on the home page so participants can refer back to this

	information easily at any time.
Sort & Rank Task	☐ Enable the **'Require that all cards be used'** option to ensure all cards are grouped. Disable if this is not the case. ☐ Randomize the presentation of cards to prevent order bias.
Stock Photo Search	☐ If photos submitted as part of a task should be participant's own photos rather than generic photos from the internet, consider disabling the stock photo search option.
Text Task	☐ Enable the **'Enforce word count'** option and set a minimum number to ensure the participant is giving a thorough response rather than one-word to complete the task. ☐ If there are multiple text questions within one Text task and you want a response to each question, use the Fill the Blanks task type instead because it will allow for a separate text box for each question and will help to organize the text responses for data analysis. ☐ If you are asking for photos using text formatting and inline images, enable the photo upload option instead of formatted text because it can be more difficult to work with in exports during analysis