Sona Systems
Researcher – Software Guide

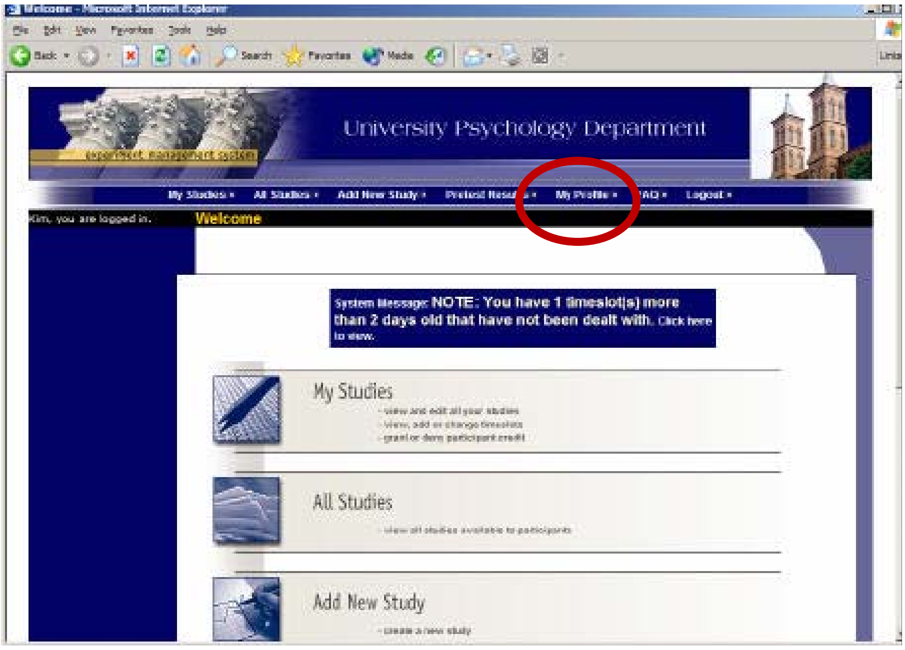
Contents

Signing up as a researcher to the system

Signing up as a researcher to the system, is done through the Lab coordinator. If you wish to sign up, send a mail to Zafrirbl@post.tau.ac.il, requesting to be signed into the research management system.

The Lab coordinator will provide you with a – username and password. Entering the system is done through the following URL - http://recanati-tau.sona-systems.com

After Logging in the system's main page will appear -



Updating your personal Profile

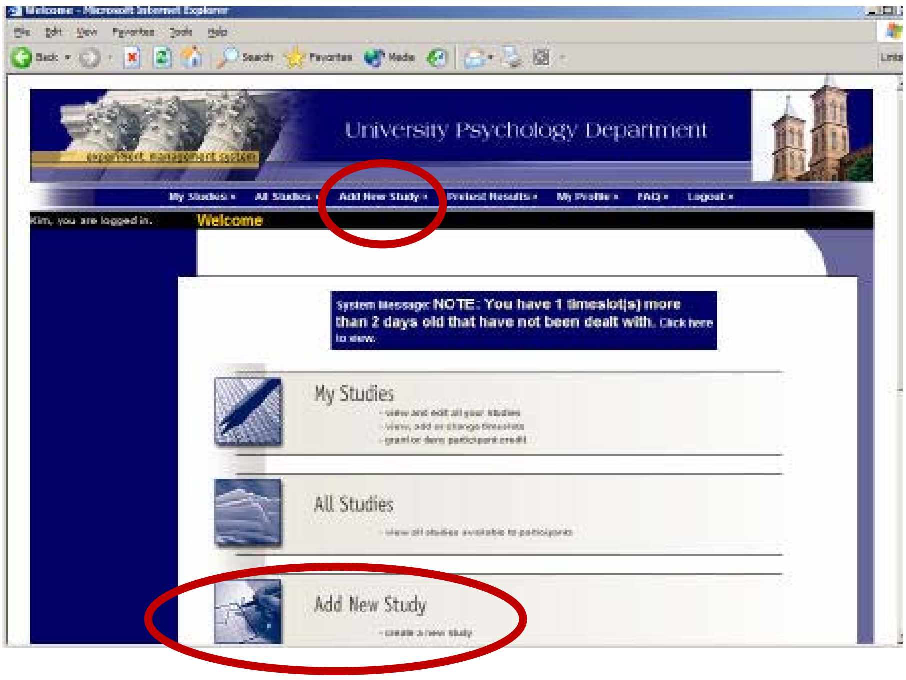
If you want to update your personal details or change your mail, username or password. It is done by pressing "My Profile" on the top tool bar.

Your contact details will be represented to subjects entering the system. If you want subjects to see a different e-mail, add an alternative e-mail to your profile. In such a case subjects will see only the alternative mail and automatic messages from the system will also be sent there.

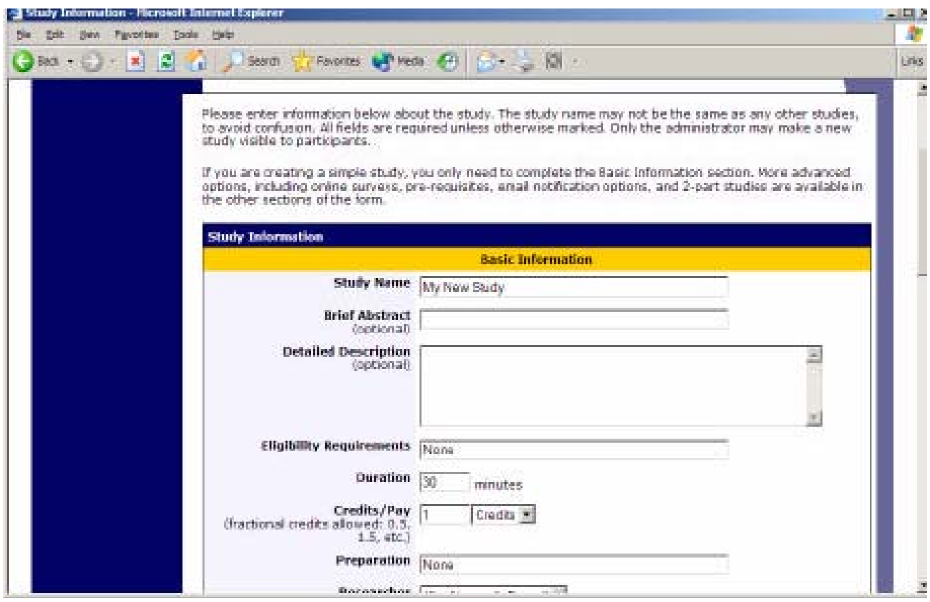
Managing your studies

Adding a Study

To add a study, choose the Add New Study option from the top toolbar. You will need to pick from four possible types of studies. Please choose this carefully as you are not able to change this later.



After you choose, the study type you'll see a form asking for more information. You will need to fill out a number of fields, which are explained in the following table. All fields must be filled out unless otherwise noted.



You can setup a study but specify that is it not visible to participants. The study will be visible once the study is approved.

Fields to fill up when setting up a study

Study Name

- A short name for the study. This is how the study is identified throughout the system.

Brief Abstract

- This is a short one or two line description of the study. This short description will be displayed to participants when they view the entire list of studies, so you may want to list the most pertinent details here. Studies configured for payment usually have the compensation information included here, particular if the payment varies based certain outcomes.

Detailed Description

- This can be a rather lengthy description about the study, and it will show if a participants clicks on the study to get more information, before they sign up.

Eligibility Requirements

- If there are any restrictions on who may participate (for instance, only those who are left-handed), list them here. Otherwise, leave the field as- is.
- If you list any restrictions, these will be displayed on the list of studies, when participants view a list of all available studies.
- Note the system does not enforce these restrictions, but it is expected a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit.

Pre-Requisites

- If there are studies a participant must participate in before participating in your study, choose them here.
- You may select multiple studies - you hold down the Ctrl key and click the desired studies.
- You may specify that participants must have participated in *all* of the studies you specify, or *at least one* of the studies specified.

Disqualifiers

- If there are any studies a participant must *not* have participated in, please select them here. You may select multiple studies.
- The system will handle enforcements of the restriction, during the sign-up process. If a study has some other study listed as a disqualifier, and a participant signs up for this study, then they will be prevented from signing up for the disqualifier study.

Duration

- The amount of time, in minutes, that each study session will take.
- If you are setting up a 2-part study, then this setting applies to the first part of the study.
- For online studies, this should be an estimate of how long participants can expect the study to take.

Preparation

- Enter any advanced preparation a participant must do here (e.g. “do not eat 2 hours before session”). If there are no preparation requirements, leave this field as-is.

Invitation Code

- If you would like to have a special sign-up password for this study, enter it here. This is known as an invitation code, and applies just for this study.
- Participants must know the invitation code to sign up for this study.
- This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants.

Is this a web-based study?

- If this is a web-based (online) study, choose the type of online study it is. If you have set up the study on another website, you should note the study is administered outside the system. If you want to set up an online survey study to be administered by the system, select the appropriate option.

Study URL The URL

- (web address, usually starting with http://) for your study. This is only required for web-based studies administered outside the system.
- If you are setting up a web-based study outside the system, and would like the system to pass a unique identifier in the URL so you may easily identify participants, add the text `%SURVEY_CODE%` in the URL where you would like the identifier to be placed. For further details contact your Lab Coordinator.

Credits/Pay

- Enter the number of credits or compensation for the study.
- A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning. If you are setting up a 2-part study, this is the value for the first part of the study.

Is this a 2-part study?

- Select Yes or No if this is a 2-part study. You can only decide this when creating a study (not when editing it), and this setting may not be changed after the study is created.

Credits/Pay, Part 2

- Enter the number of credits or compensation for part 2 of the study, if this is a two-part study (the value is ignored otherwise). A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning.

Part 2 Duration

- The amount of time, in minutes, that part 2 of the study will take.

Part 2 Scheduling Range

- Specify the number of days (as a range) after part 1 is scheduled, that part 2 should be scheduled. This setting only applies to two-part studies. The range must be a whole number.

Part 2 Scheduling Leniency

- In some cases, you may want to ensure that the participant schedules the second part of the study to take place at exactly the same time (on a different date) as the first part. If so, choose Yes for this option.
- If there is some flexibility so they can sign up for any time within the Part 2 Scheduling range, choose No for this option.

Researcher(s)

- Select the researcher for this study. Your name will automatically be selected. If you are a researcher, then you may not change who the researcher is (the P.I. for the study, as well as the administrator, can change the researcher).
- You may specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study.

Principal Investigator

- Select the Principal Investigator for this study. The person you select will have full access to the study. If you see this option, then you must select a P.I. The pulldown box lists only users who are principal investigators.

IRB Approval Code

- Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies.

Approved?

- Select Yes if this study should show up on the list of studies which participants may sign up for. A study must be Approved and Active to show up on the list of studies which participants may sign up for.
- If you select No, the study will not be visible to participants.
- Only the administrator can approve a study. If that is the case, you should contact the administrator when you are ready to make the study visible to participants. A handy form is provided on the page to do so.
- As a researcher, you can always make a approved study invisible to participants (by making it not approved).
- If you change key items about the study, specifically the name or descriptions, the study will automatically be made invisible to participants, until the administrator reapproves it (if the system is configured this way).

Active Study?

- Select Yes if this study is in progress.
- if you want the study to show up to participants so they can sign up for it - You must select Yes and the study must be Approved If a study is Not Approved but *is* Active, then it does not show up (to participants) on the listing of studies.
- **The reason to select No** is if the study is being kept for historical purposes, but should not show up to participants on the list of studies they may sign up for. Often, this is done so the system can enforce prerequisites, where the inactive study is a prerequisite for an active study.

Should the Researcher receive an email notification when a participant signs up or cancels?

- If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up, or cancels their signup, for this study.
- Researchers will also receive a if a participant cancels a study that was a prerequisite for the current study.

Researchers at Timeslot-Level

- If set to Yes, it will be possible (but not required) to assign a specific researcher (from the list of researchers for the study) to a timeslot. If set to No, then it is assumed that all researchers (assigned to the study) are responsible for all timeslots.

Can a participant sign up for this study more than once?

- If you would like to allow participant to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No.

Private Comments

- This is an optional area where you may enter any comments or notes about the study, which are only visible to the researchers for this study, and not to participants.

Participant Sign - Up Deadline

- Enter the deadline before the study is to occur that the participant may sign up, in whole hours.

Participant Cancellation Deadline

- Enter the deadline before the study is to occur that the participant may cancel their existing sign up, in whole hours. Generally the cancellation deadline should be shorter than the sign- up deadline, so participants can easily cancel an accidental sign-up.

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information.

Updating a Study

Choose My Studies from the top toolbar, and you will see a list of your studies. Click on the desired study, and choose the Change Study Information link. You will see a form remarkably similar to the one you used to add the study. A few options may no longer be changeable depending on the status of the study (e.g., if participants have already signed up for it). The fields shown are all the same as when you added the study.

If administrator approval is required before a study is made visible to participants, and the name, description, or eligibility requirements of the study are changed, then the study will require re-approval by the administrator before it is again visible to participants.

Deleting a Study

You may delete a study only if participants have not signed up for it. If you need to delete a study which already has sign-ups, you should make it Inactive instead, if you do not want it to be visible to participants. You may not delete a study which has sign-ups, so the option will not be presented. **If you want to delete a study that has sign- ups, please contact the administrator**.

To delete a study, choose My Studies from top toolbar, click on the desired study, then choose the Delete Study option. You will see a confirmation page. Choose Yes (at the bottom of the page) to delete the study.

If you delete an online survey study, the survey and all data collected will also be deleted.

Viewing Your Studies

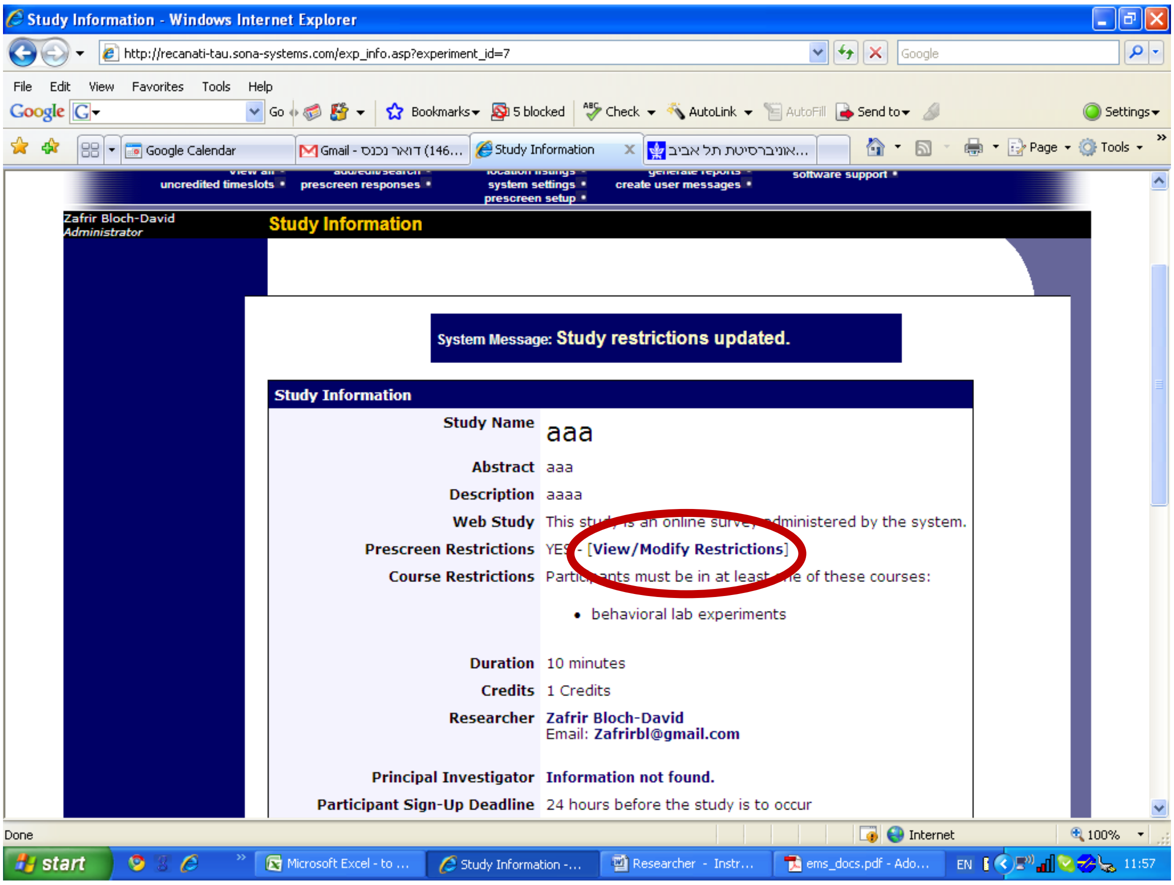
To view your studies (and not the studies of others), choose the My Studies option on the top toolbar. The system will list all your studies in alphabetical order by study name, grouped by studies that are active, then inactive studies.

Prescreen Participation Restrictions

- If the system contains an online prescreen that participants may complete. You may place Participation restrictions on your study based on prescreen responses.
- Participants are unaware that such restrictions are placed on the study. These restrictions are never listed to them. If they do not qualify to participate in a study because they do not meet the prescreen participation restrictions, then the study will simply not be listed to them.
- You may restrict a study on any question or questions on the prescreen that allowed for a multiple-choice answer where only one choice could be selected.
- You may also restrict a study based on a computed section sum or average score for a participant.
- You may restrict to one choice or many choices for any question. If you restrict on multiple questions, it is the same as a logical "AND."
  For example - if you setup the prescreen restrictions so that participants must have answered "Yes" to a "Do you wear glasses?" question and "Blue" or "Grey" to "What color are your eyes?", then they must meet both requirements to participate. In other words, only participants who wear glasses and have either blue or grey eyes are eligible. There is no support for a logical "OR" restriction across multiple questions. The restrictions are inclusive, which means that if you select a choice as a restriction, then participants must have answered at least one of the choices selected for each question that is part of the restriction in order to see and participate in the study, as opposed to exclusive where checking the choice as a restriction would exclude them from participation.

Setting participation restrictions

Choose view (do not choose edit) your study and choose View/Modify Restrictions.



You will see a list of eligible questions which you may use for your restrictions. If the study already has some restrictions, those will be checked, and you will see how many participants currently meet the restrictions. Choose the questions you would like to restrict upon and click on the Set Restrictions button. On the subsequent page, you can select each value that is acceptable for each question you have chosen. Once you have selected all the acceptable values, save your changes and they will take effect immediately.

Inviting Qualified Participants to a Study

While viewing the list of prescreen restrictions currently set for a study, and the number of participants who meet those restrictions, you may see the option to Invite Qualified Participants. Using this option, you may craft an email to be sent to all qualified participants. The system will pre-fill the email text with useful information like the name of the study and how many timeslots are currently open.

Online Survey Studies

Introduction

There are two options to run online experiments.

1. An online survey feature within the system – this feature allows you to set up an online survey as a study within the system
2. An online experiment outside the system - this feature allows you to set up an online survey outside the system through a hyperlink.

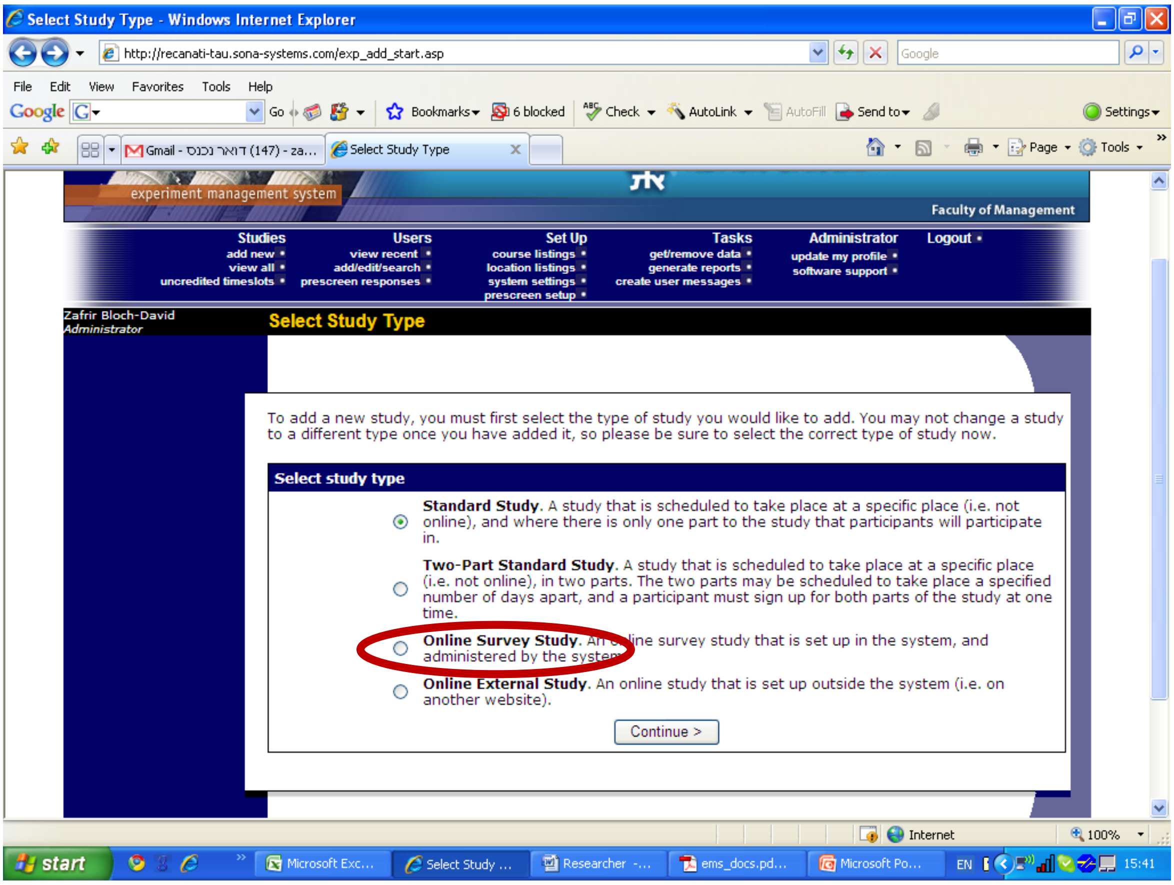
An online survey feature within the system

Participants who sign up for the study will be asked to immediately complete the survey. Upon their completion of the survey, they will be granted credit automatically by the system.

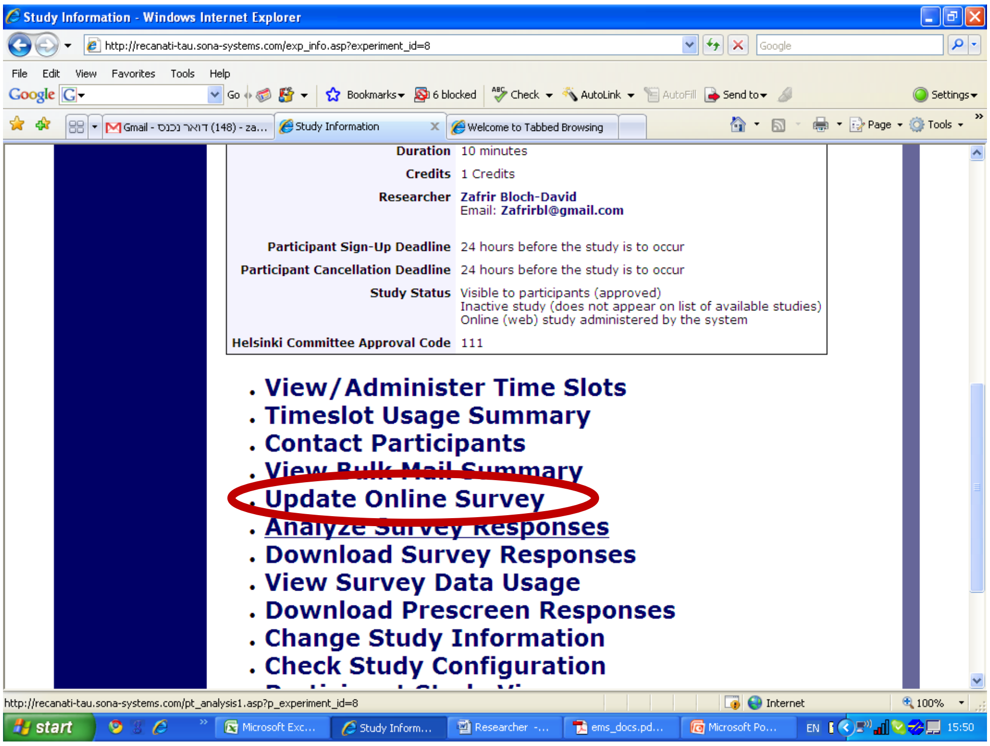
Creating or Modifying a Survey

To create a survey

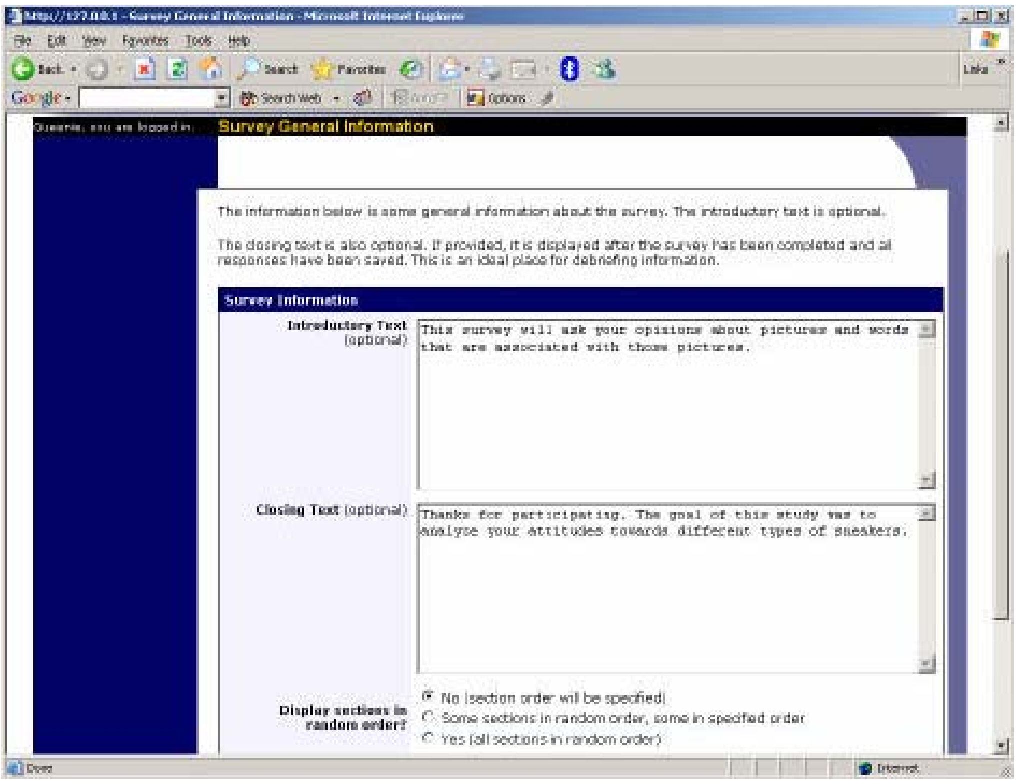
1. first create an online survey study
2. Choose the option "Online Survey Study"



1. Fill in the study information
2. On the study information page choose "Update



3. Start writing the survey



Survey Fields

Introductory Text (Optional) –

Text that will be displayed when a participant starts the survey.

Closing Text (Optional) –

Text that will be displayed after a participant completes the survey and saves their responses. This is an ideal place for debriefing information.

Display sections in random order? –

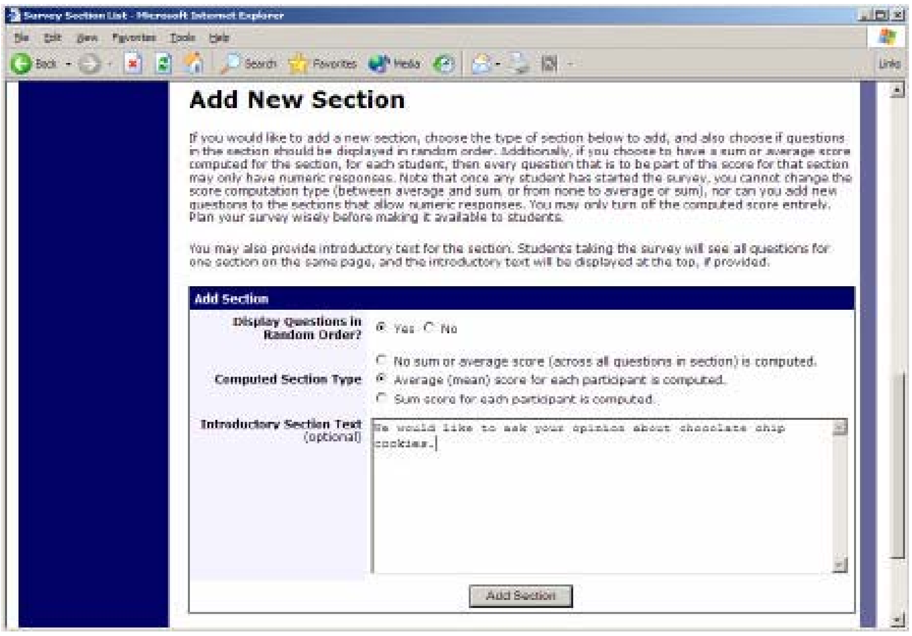
You may specify a specific ordering for sections, have the system randomize the order for all sections, or specify the order of some sections, and a random order for other sections. If you specify the order for only some sections, you may also specify, for each section, whether it should be displayed before or after the random ordered sections. The system does not keep track of the random ordering for sections for each participant.

Participant response review/change -

If set to Yes, then participants may review and change their responses just before they complete the online survey. They are given this opportunity after they complete the last section of the survey, and before any closing text is shown. At this point, they can see all their responses and go back to any section to change their responses. Once they complete the online survey, they cannot go back at a later date and change any responses.

Adding or Modifying a Section

To add a new section, choose the Add New Section link at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.



There are three pieces of information you may provide for each section

1. Specify some introductory text to be displayed at the beginning of the section. When Participants take the survey, they view one section at a time, and all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in that section.
2. Choose if the questions for that section are displayed in random order or the order in which they are entered.
3. Choose to compute a section - have the system compute a section sum or average (for each participant) for the section.

Adding or Editing a Question

- To add or edit a question, choose the appropriate choice from the Section List, next to the desired section.
- Questions will be displayed in the order they are added to a section, or in
- a random order, depending on the section settings.
- Questions cannot be reordered after they are added, so this should be planned carefully. Depending on the state of the section and if participants have taken the survey, some options will be automatically set for you, and not changeable.
- All fields must be filled out.

Question Fields

Question Text - The text for the question

Abbreviated Question Name - A 15 - character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format.

Question Type -

- Multiple Choice (select one)
- Multiple Choice (select many)
- Free Entry

Display length of Free-Entry field - Specifies the length (size) of a free-entry field when it is displayed. Acceptable values for this setting are 5-85, and the field will always allow participants to type in up to 255 characters.

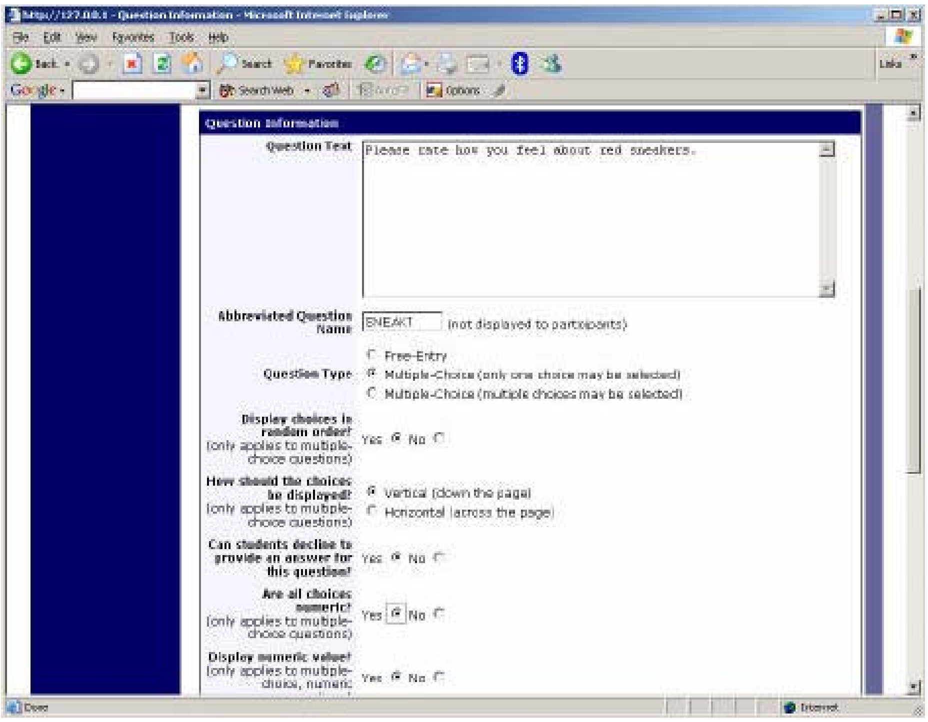
Display choices in random order? - If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple choice questions.

How should the choices be displayed? - Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed.

Can participants decline to provide an answer for this question? - If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question.

Are all choices numeric? - If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple choice questions.

Display numeric value? - If set to No, the numeric value of the choice is not displayed to participants.



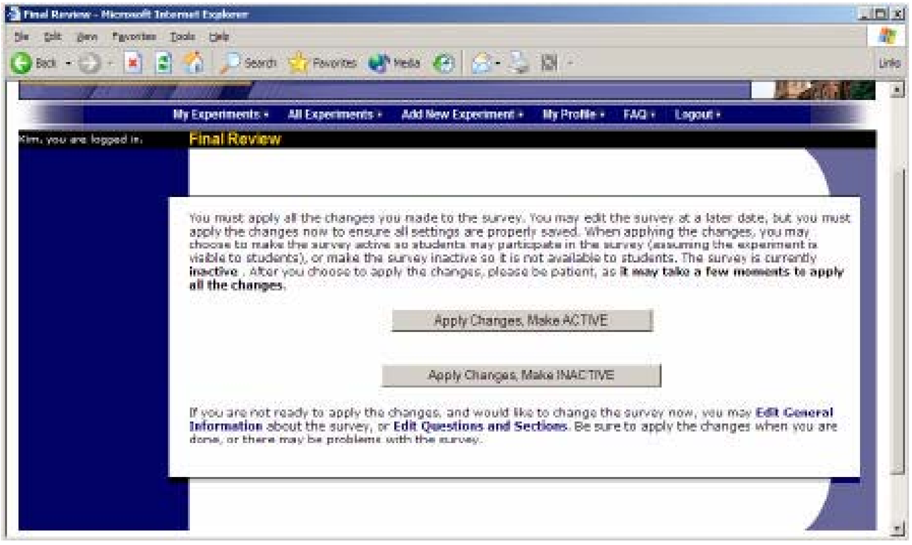
Copying a Question

Many questions have the same measures (choices). You may use the **Copy Question feature** to copy a question (Such an option is only available for multiple choice questions) -

- Select the question you would like to copy (when viewing the Section List).
- Choose from a list of sections where you want to copy this question to.
- Edit the copied question
- Save changes

Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing of the survey later, it is **imperative** that you go to the Final Review step, as the system needs to save certain special changes and make some computations.



An online experiment outside the system

If you are running a web based experiments outside the Sona System, then note that the crediting will not occur automatically. You have to provide your subjects with an Identification Code, in order to insure their privacy on the one hand and to keep track of the crediting on the other hand.

There are two ways of doing this –

1. Advanced – For more information Contact your Lab administrator.
2. Standard – Giving the Subject the URL of your experiment. Subjects will reach the URL Manually and will have to login to the external web experiment manually.

Viewing Survey Data Usage and Deleting Survey Data

The system has a limited amount of storage space, It is necessary to download and delete the data at least once a week.

<u>Procedure</u> –

1. Go to "study list"
2. Click on the study that you want to download it's data
3. Go to "View Survey Data Usage" link that appears on the study information page
4. Download Data to your computer and save it
5. Delete Data from system

Analyzing Survey Responses

To successfully analyze the data, you will need to download 2 sets of data –

1. The first is the question key, which lists a unique numeric identifier for each question, along with the question text and abbreviated question name. It also includes the section number each question was in.. **This data is in CSV format, and is available by clicking the Download Question Key link on the Download Survey Responses Page.**

2. Survey Data - After you download the question key, you can download the survey data. The system may require that you download the data in sections if there is too much data to be downloaded as one file. The data is in CSV format, and is presented as one row per respondent, with each of their responses in a different column. The first row includes the column headings, and the column heading maps to the abbreviated question name.

Working with Timeslots (Sessions)

Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study.

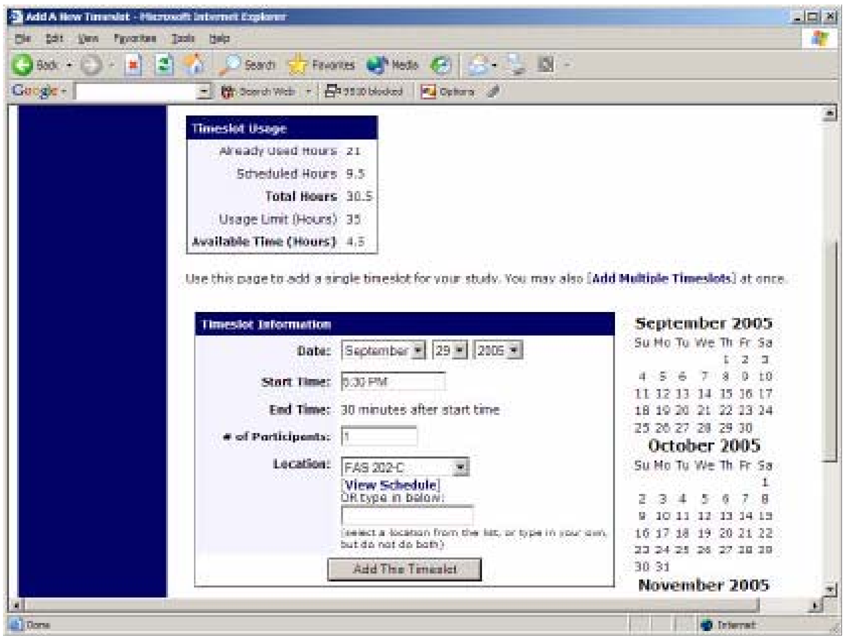
There are two Kinds of Time slots

1. Regular Experiments
2. Web Experiments

Creating Timeslots

Adding a timeslot to a study –

1. Choose the study that you would like to add a timeslot for from your study list.
2. Choose "**View/Administer Time Slots**"
3. You will see a list of any existing timeslots, and the "**Add A Timeslot**" option at the bottom of the page. Click on Add A Timeslot.



The following table lists the information you may enter about a timeslot, along with an explanation. All fields are required.

Required Fields

Date - The date for the timeslot

Start Time - The time for the timeslot

End Time - The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.

Number of Participants - The number of participants for this timeslot.

Location - The physical location where the study will take place, for this timeslot. You may choose locations from a list and click on View Schedule to see the schedule for a location. The system will automatically prevent you from adding a timeslot using a location that is already in use at the time you try to schedule the timeslot. If you do not see the location in the list that you plan to use, you can simply type in the location in the text field below it.The location field does not apply for web based studies.

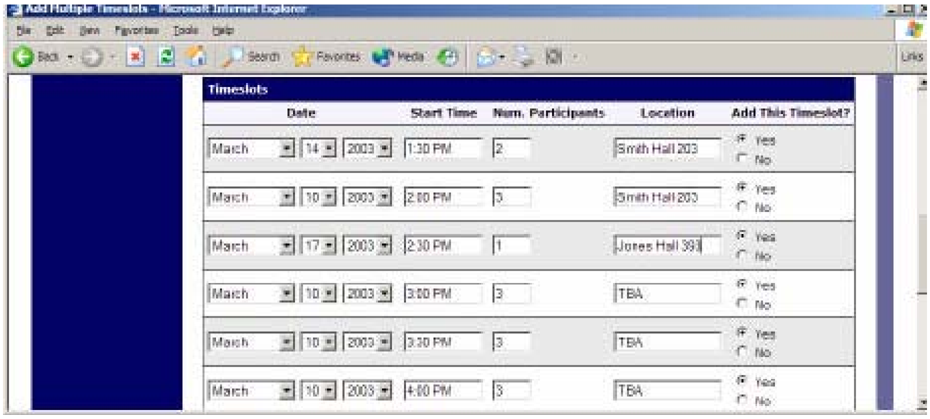
Researcher - The researcher assigned to this specific timeslot. The list will contain a list of all researchers for the study. Choose ALL if all researchers (for the study) should be assigned to this timeslot

Time Slots for web Experiments

If you are running a web-based (online study), you should create a single timeslot with the participation deadline equal to the last day you would like to run the study. For number of participants, specify the maximum number of participants who may participate.

Creating Multiple Timeslots

1. Choose the Add Multiple Timeslots link. You may choose to add a specified number of timeslots, or copy the timeslots from another week to a specified week.
2. If you choose to copy, the system will copy the time, location, and number of participants for the specified week to the desired week, for each day of that week (starting with Monday).
3. If you choose to create a specified number of timeslots, you can choose the number of timeslots you would like to add, the start time and date, and the amount of time between each timeslot (to allow for breaks). You also may specify that timeslots that would occur outside normal business hours be shifted to the next business day.
4. On the subsequent page, you may deal with special cases.
5. Timeslots that you attempt to add, that either have errors or would result in exceeding the timeslot time usage limit, will not be added.
6. If you would do not want to add a specific timeslot that is listed, choose No in the Add This Timeslot?

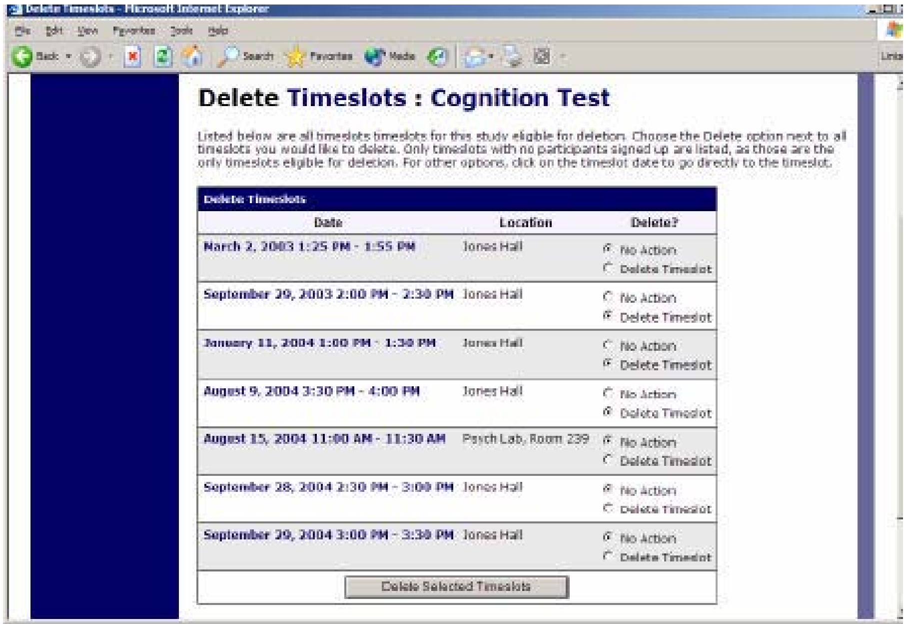


Modifying and Deleting Timeslots

1. Choose the study that you would like to deal with.
2. Choose the Timeslots option in the timeslots column for the desired study.
3. If the timeslot has no participants signed up for it, you will see a Delete button. **You may not delete a timeslot that has participants signed up for it.**
4. If you would like to delete the timeslot, click the Delete button, and you will see a confirmation page. Choose Delete again to delete the timeslot.
5. If you would like to modify the timeslot, modify the desired information and click the Update button just below the timeslot information**. It should be noted that participants will *not* be notified (by email) of any changes you make to the timeslot, so you should contact them if information needs to be passed on to them (a link is provided on the same page to do so)**. If you change the date or time of the timeslot, you will be warned that this was changed.
6. You may not update the size of the timeslot (number of participants) to a value lower than the current number of participants signed up for the timeslot.

Deleting Multiple Timeslots

1. Select the desired experiment and choose Timeslots.
2. At the bottom of the Timeslots page, you will see a Delete Multiple Timeslots option.
3. You will see a list of timeslots eligible for deletion. Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to proceed.
4. If you would like to delete all empty timeslots, there is a Select All option at the bottom of this page that will automatically select all timeslots listed on the page for deletion.
5. Click the Reset button to revert the effect of choosing the Select All option.



Timeslot Usage Summary

The timeslot usage summary is available when viewing your study. This gives some basic information about timeslot utilization in the past and in the future, as well as some basic no-show information. It also gives information on timeslots for the study by location (if the study is not an online survey study or external web study), and by researcher (if the study is configured to allow researchers to be assigned to specific timeslots).

Viewing the Participant List

1. Choose the My Studies option from the top toolbar.
2. Click on the Edit link in the timeslots column for the desired study
3. Select the timeslot you would like to see, and click the Modify button. The list of participants, along with their ID codes, will be listed.

Granting or Revoking Credit

1. Find the desired study and timeslot - To view your studies, choose the My Studies option from the top toolbar. Click on the Edit link in the timeslots column for the desired study, then select the timeslot you would like to see, and click the Modify button.
2. Assigning credit - You will see a list of participants, identified either by name or ID code.
3. Click the Credit Granted button next to their name
4. If the participant did not appear for the timeslot, choose the Participant No-Show?
5. Click on the Update Sign- Ups button at the bottom of the list of sign- ups to save your changes. Credit will be granted. The participant(s) will be emailed about this.

Remarks - If a participant is granted 0 credits, and the study is set to prevent duplicate sign- ups, then the participant will not be able to sign up for that study again.

Batch Credit Granting

To automatically sign up and immediately credit a group of participants -

1. Go to the appropriate timeslot (you may want to create a timeslot specifically for this purpose), and click on Modify Timeslot.
2. In the Manual Sign-Up section, you will see a Batch Credit Grant link. Click that and you can provide the list of User IDs of users you would like to sign up and credit. Users will be signed up and credited immediately. This feature overrides any sign- up restrictions on the study.

Viewing Uncredited Timeslots

When you login to the system, you will receive a warning if you have any timeslots that are more than 2 days old and haven't been dealt with. You may view a list of all timeslots that have not been dealt with by choosing the **View Uncredited Timeslots** option from the My Studies page. The timeslots for online studies, including those in the future, are always considered in need of a response.