Sona-Systems Justus-Liebig-University Gießen - Guide and FAQ for Researchers

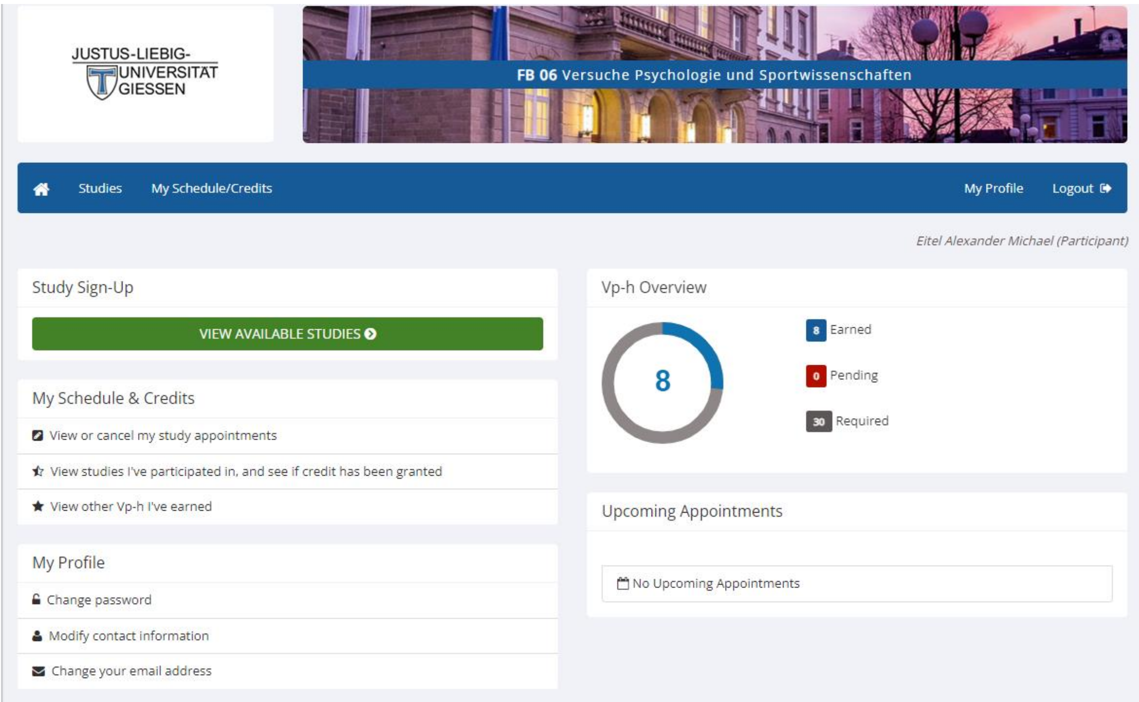
1. What is Sona Systems?

Sona Systems is a cloud-based research and participant management solution for universities. Researchers can recruit participants, set up time slots for studies, manage and credit study participation using any major web browser.

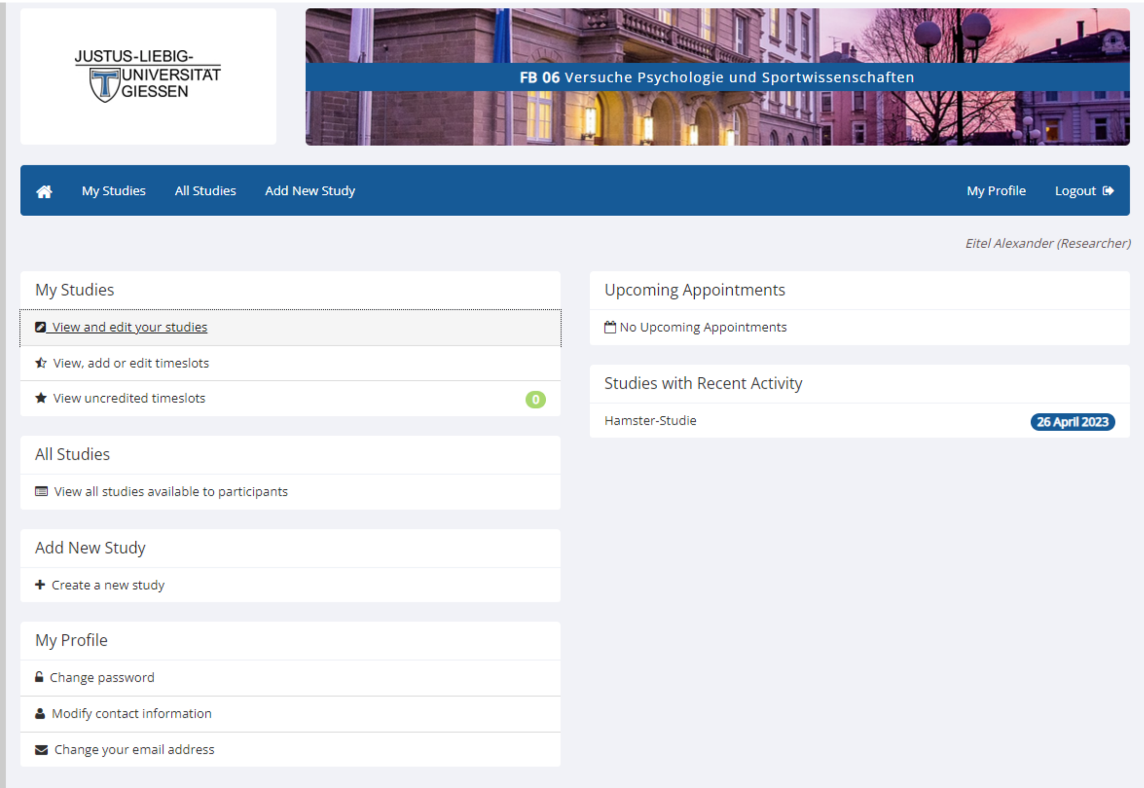
2. What types of accounts exist in Sona, how do I get them, and what can I do with them?

There are four types of accounts in Sona:

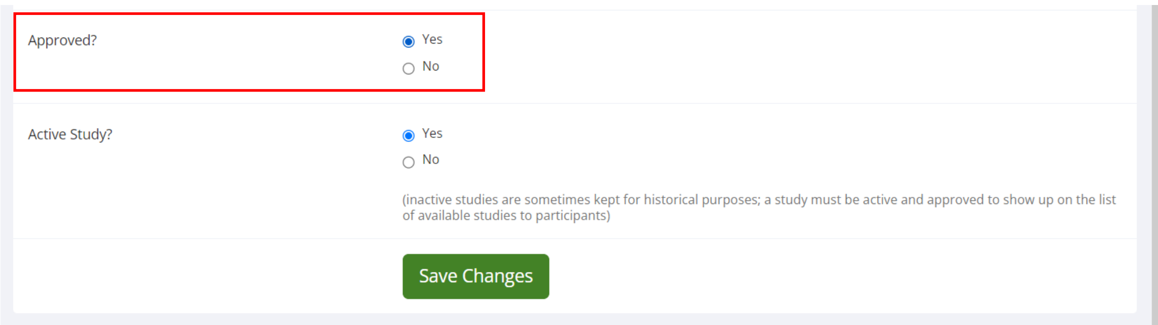
Participant account: This is a personalized account for students who want to take part in experiments to earn credits (VP-Stunden) or money. Participants register once via this page: https://uni-giessen.sona-systems.com/student_new_user.aspx, by entering their name, student id (Matrikelnummer), email and user id that they chose on their own. Students then log in with their user id and password (automatically sent to them) via this page: https://uni-giessen.sona-systems.com/default.aspx?logout=Y. After logging in, participants see studies that are available for them (for which they fulfill eligibility criteria; see green button in screenshot below). Participants also see an overview of their earned credits relative to the required credits depending on their study regulations; see "VP-h Overview" in screenshot below: This Bachelor psychology student earned 8 of the required 30 credits ("VP-Stunden") so far. Participants also see their upcoming appointments etc.



Researcher account: This is a personalized account for scientific staff, research assistants, and students who gather data for their Bachelor or Master thesis. An admin sets up researcher accounts for the own working group (see account type below). Researchers add and edit studies and timeslots (see screenshot below), can contact participants and credit their participation. For further details, see the answers to the questions below.



Admin Account: There is one admin account per working group. The head of the working group decides who the admin is. The main admins (xxx) set up the admin accounts for the working groups. We recommend a person as working group admin who has a long-term contract (including secretary). The working group admin adds and deletes researcher accounts. The admin needs to approve each study (see red frame in screenshot below).



Note that there is a fourth option, Instructor Account, which we do not need for our purposes.

3. What types of studies can I set up as a researcher?

Standard Study: A study that is scheduled to take place at a specific time, in a specific place (lab) or over videoconference. Participants sign up for a time slot.

- **Multi-Part Standard Study:** In general, this type is similar to a Standard Study. However, participants must appear more than once, which is why they sign up for multiple time slots.
- **Online External Study:** A study that is conducted online on an external platform like SoSciSurvey, Limesurvey, Unipark, PsyToolkit, pavlovia or any other website. Participants can take part any time by clicking on the link.
- **Multi-Part Online External Study:** In general, this type is similar to an Online External Study. However, this type consists of multiple parts which are scheduled to take place a specified number of days apart. Please note that participants must sign up for all parts of the study at one time.

4. What types of compensation can I choose?

When setting up a study you need to choose between credit or paid.

- **Credit:** Participants receive credit (VP-Stunden)
- **Paid:** Participants receive payment**.**
- In case you want to **offer both options and let participants choose whether they want credit or payment**, select credit and note in the study description that payment is an option, too. For participants who get payment, the researcher grants them 0 credits (so the participation is noted correctly) and marks in the comments that they were paid instead (so it's clear to everyone).

5. What information do I need to enter when setting up a study?

Study Name: *(displayed in Study Overview)* Provide a short name for the study.

Brief Abstract: *(displayed in Study Overview)* The following information is essential:

- Type of study (e.g., Online-Studie, Laborstudie)
- Participants' Task (e.g., Reaktionszeitaufgaben am Computer, Lesen und Erinnern, EEG-Studie zur Wahrnehmung von Bildern, Eye-Tracking-Studie zum Textverständnis)
- Duration (e.g., Dauer: 30 min)
- Warnings *(optional)* (e.g., Studie kann negative Gefühle auslösen)
- Location *(optional)* (e.g., Ort: F-Turm) [The exact location is displayed to participants, when they sign up for a timeslot]
- Payment *(optional)* (e.g., 6 € Vergütung alternativ zu VP-Stunden) [Only necessary if you selected "credit" but want to offer payment as an alternative. If you selected "paid", the amount of payment is displayed automatically, see below.].

Example: Laborstudie | Reaktionszeitaufgaben am Computer | Dauer: 30 min | Ort: F-Turm

Detailed Description: *(optional)* Provide more information about the study. This description is displayed after participants click on the study.

Eligibility Requirements: *(optional, displayed in Study Overview)* Describe eligibility requirements that you cannot set otherwise.

Duration: Indicate the duration of the study in minutes. Note that the duration you enter is later used when you set up multiple timeslots for your study. Therefore, it is recommended to round up the duration such that setting up time slots is convenient (e.g., round to 30, 45, 60, 75, etc. minutes).

VP-Stunden or Payment *(displayed in Study Overview)***:** Indicate the amount of VP-Stunden or money participants receive for participation. If participants can choose the type of compensation enter the number of VP-Stunden here and include information about payment in the Brief Abstract.

Preparation: *(optional)* Here you can describe what participants should do to prepare for the study (e.g., do not eat for x hours before the study starts, no make-up, etc.).

Researcher: Select the researcher account(s) that should have access to the study. You can choose more than one researcher account.

EthikkommissionFB06 Approval Code: *(optional)* You may want to enter the ethics committee approval code.

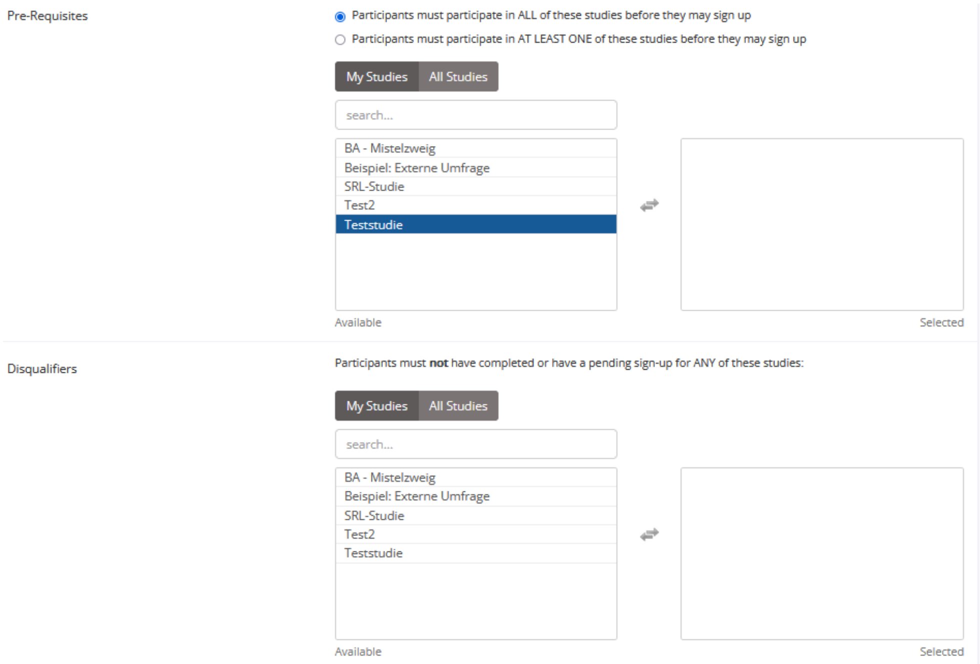
Approved? When the initial set-up is completed, *your study has to be manually approved via an admin account*. Contact your working group admin. Only studies approved by an admin are visible for sign-up for participants. After approval 'Yes' will be automatically ticked. You can revoke approval by ticking 'No'.

Active Study? Select 'yes' if the study should be visible to participants. Select 'no' if the study should not be visible.
IMPORTANT: When a study is completed, select 'no' as well. In this way, the study remains in the system but is no longer visible to participants. Otherwise, the overview of the active studies loses its informative value (for both participants and researchers).

Please note that completed studies cannot be deleted but should be made inactive. Completed studies must remain in the system because they are needed for credit assignment and for setting disqualifiers based on previous study participation.

Advanced Settings

Pre-requisites: If participants must have participated in a previous study to participate in the present study, select this study from the list.
Disqualifiers: If participants must not have participated in a previous study to participate in the present study, select this study from the list.



Course Restrictions: Restrict participation based on the course (Studiengang) participants belong to.

Invitation Code: Restrict participation based on an invitation code. You need to make sure that your participants know the code (e.g. send the code via email or display it to participants in a screening study).

Study URL: If this is an online study, enter the URL here.

Participant Sign-Up Deadline: Enter the time (in hours) participants can sign up for a time slot. Shorter time frames may increase participation rate.

Participant Cancellation Deadline: Enter the time (in hours) participants can cancel an appointment.

Researcher Email-Notifications: Select your preferred option. The email is sent to the researcher account.

Researchers at Timeslot-Level: If a study is associated with more than one researcher account, you can assign researchers to specific time slots. This option may not be relevant to you, because usually a researcher account is used by more than one person.

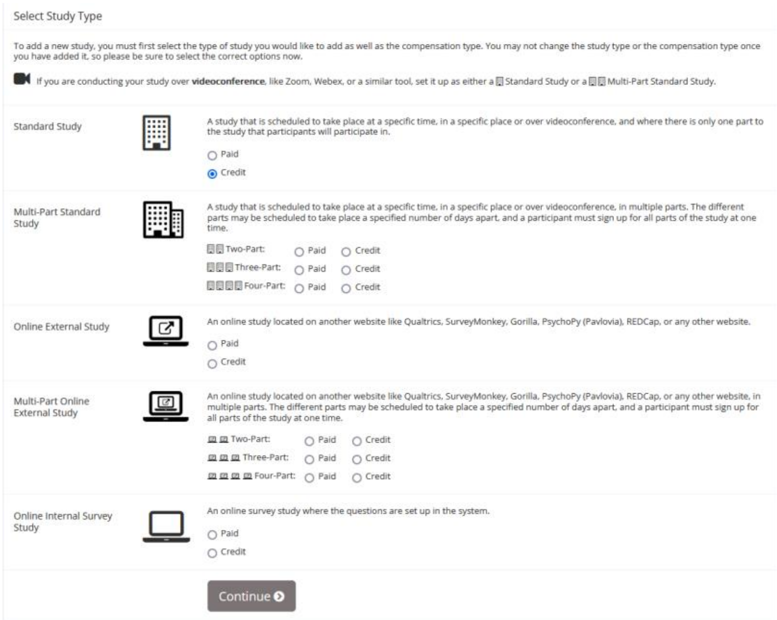
Shared comments: (optional) You can enter information about the study that is visible to all researchers and PIs in the system, but not visible to participants.

Private comments: (optional) You can enter information about the study that is only visible to the PI and the researcher associated with this study.

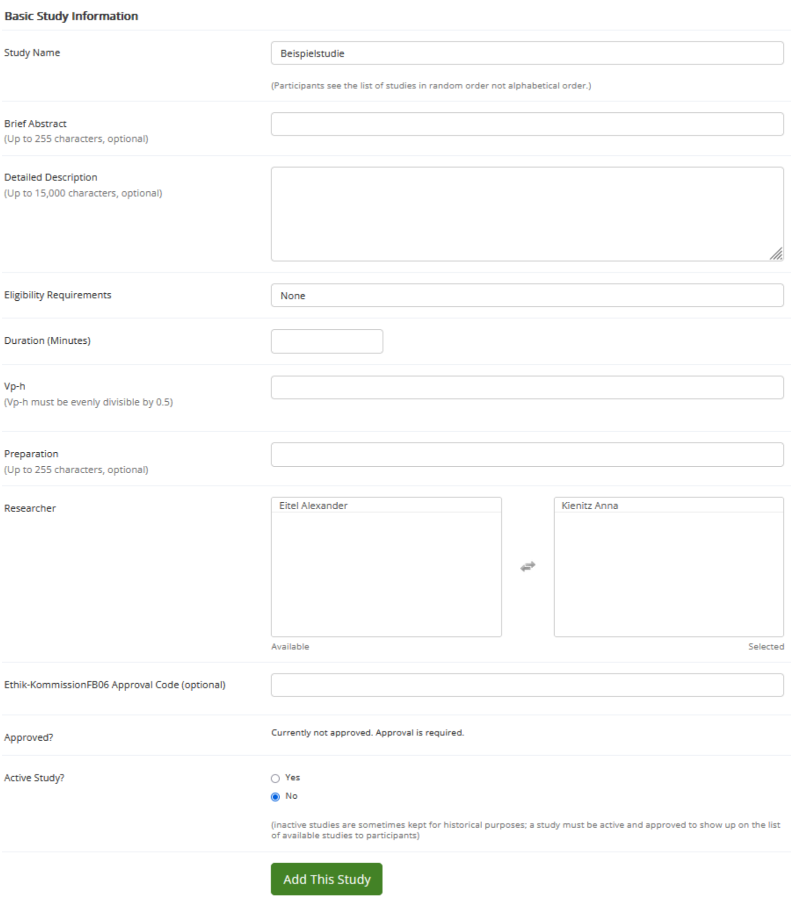
6. How to set up a new study?

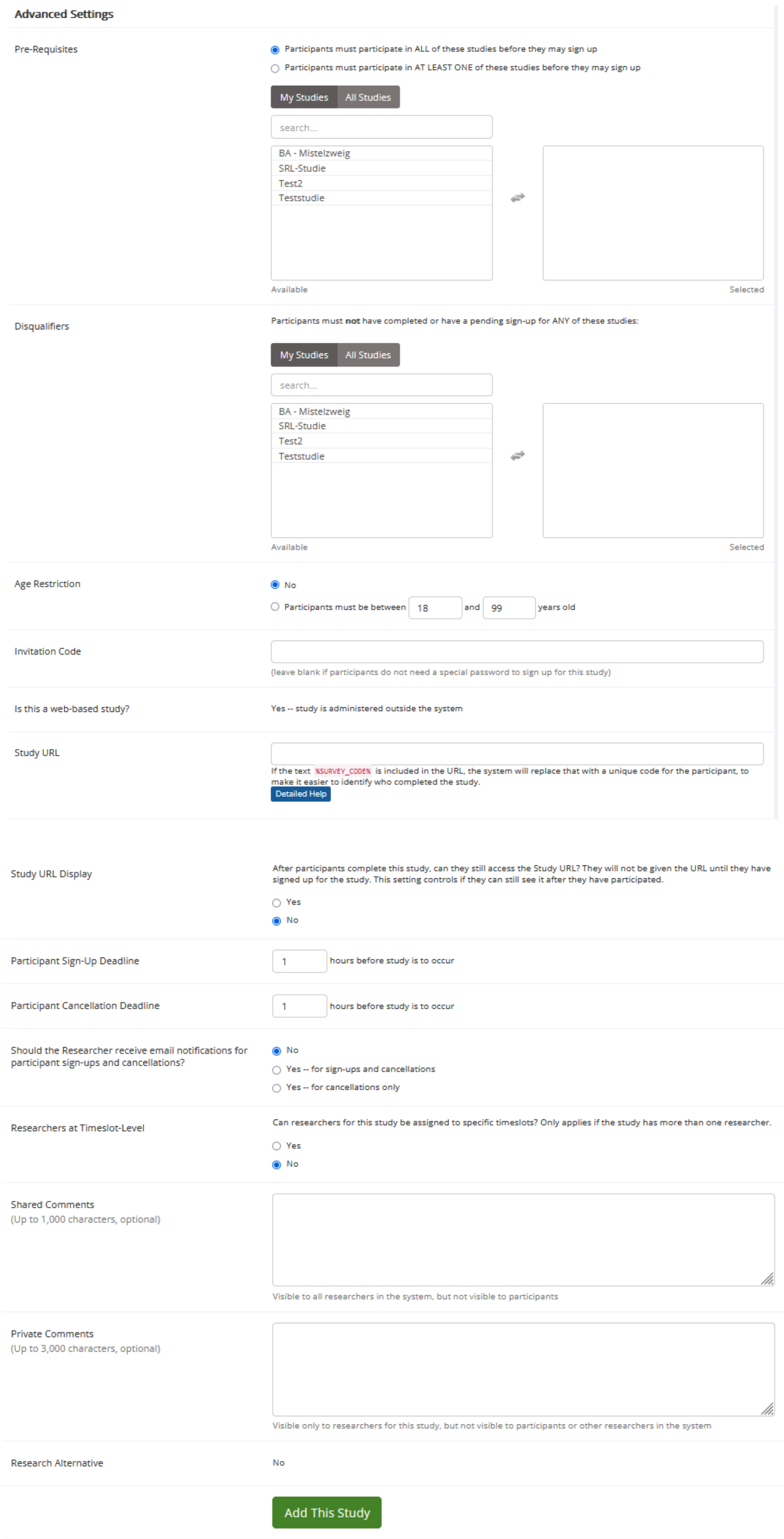
1.Click on “add new study”.

2. Select one of the five types of study and the compensation type.



3. Fill out the basic information (and the advanced Settings if necessary).

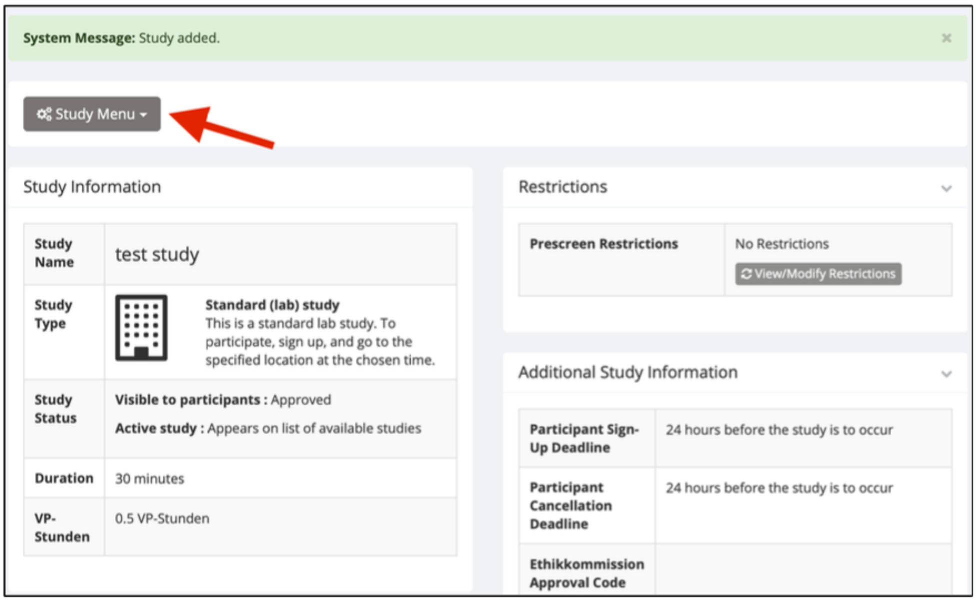




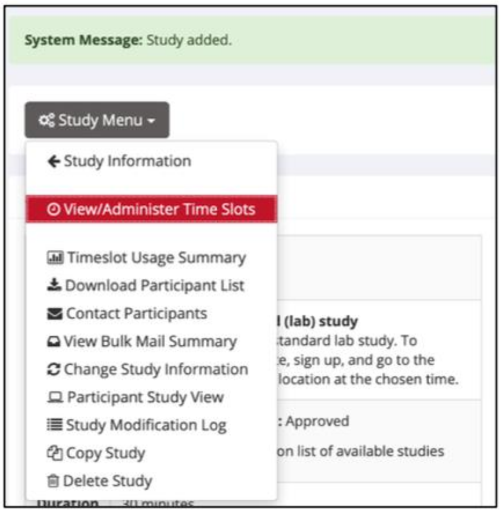
4. Click on 'Add This Study' to set up the new study.

7. How can I set up time slots and locations for a lab study?

After you have set up a study, go to Study Information of this study and click ‘Study Menu’.

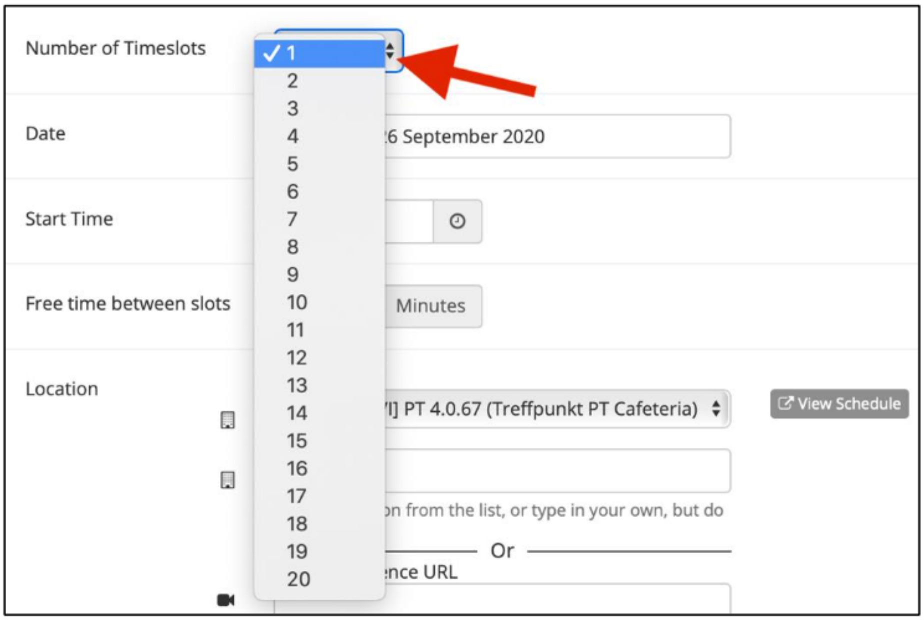


Then, select ‘View/Administer Time Slots’ from the drop down list.



Then, you can choose between ‘add a timeslot’ and ‘add multiple timeslots’. With the ‘add multiple timeslots’ option you can set up multiple timeslots for a single day (but not for multiple days). Once you have set up the timeslots for an entire week, you can copy the timeslots to another week.

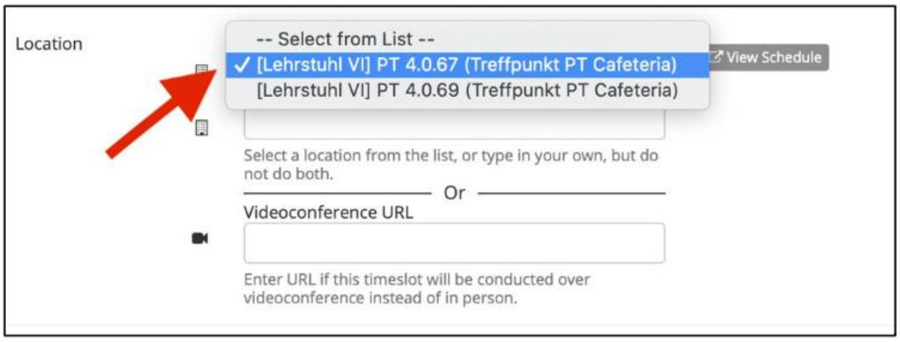
To set up the timeslots for a single day, select the number of timeslots on this day that succeed one another.



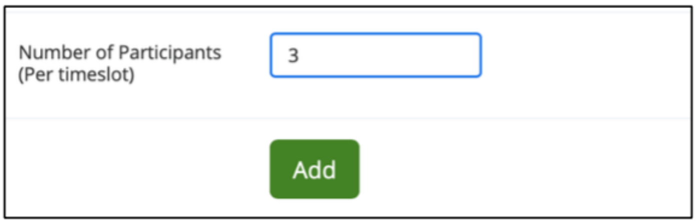
Then, select the date, enter the start time on this date and (optional) free time between slots. If, for example, the duration of your study is 45 minutes, you may want to enter 15 minutes free time between slots. This way, each slot starts at the full hour.

Then, enter the location. You can either select a location from the drop down menu or enter a location not listed. Note that the location you select or enter will be sent to participants in the confirmation email. Therefore, it is recommended to mention the meeting point. There is no need to describe the meeting point somewhere else.

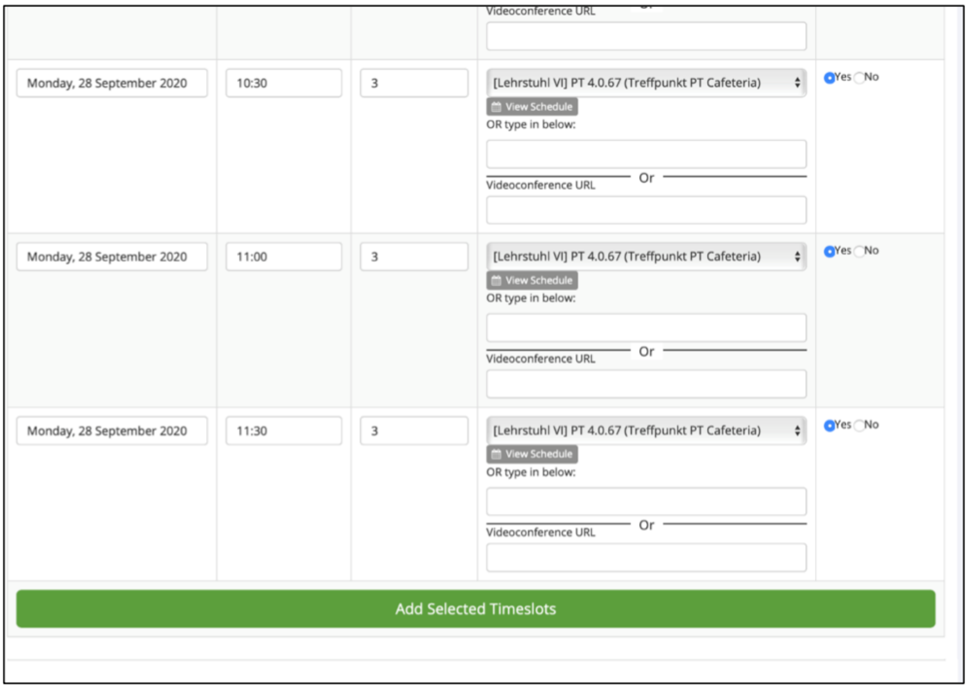
If your study is conducted via videoconference, enter the videoconference URL.



Then, enter the number of participants who can take part at the same timeslot.



After you have clicked ‘Add’ you should review the timeslots. Then, click ‘add selected timeslots’.



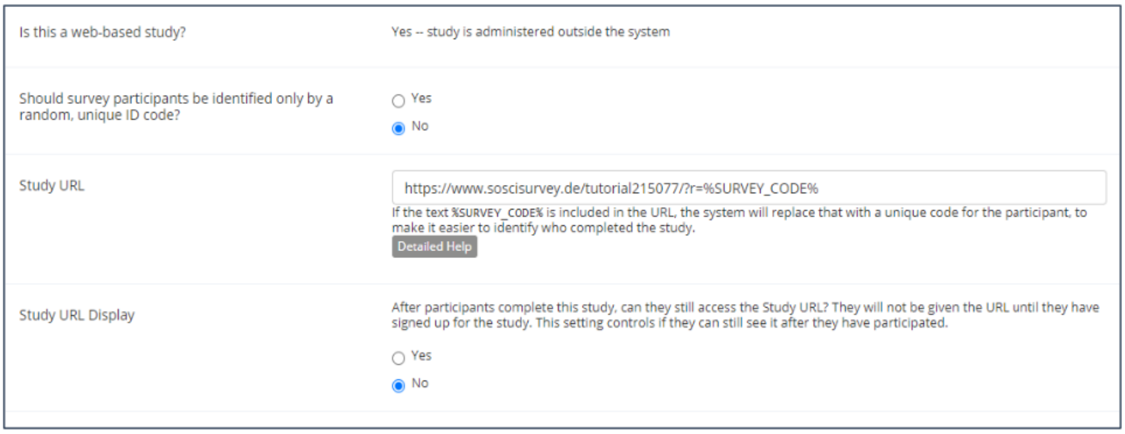
8. I want to administer time slots for different studies in the same location at the same time - is that possible?

It is not possible by selecting the location from the drop down menu. This way, double bookings are prevented. However, it is possible by manually typing in the name of the location in the location field.

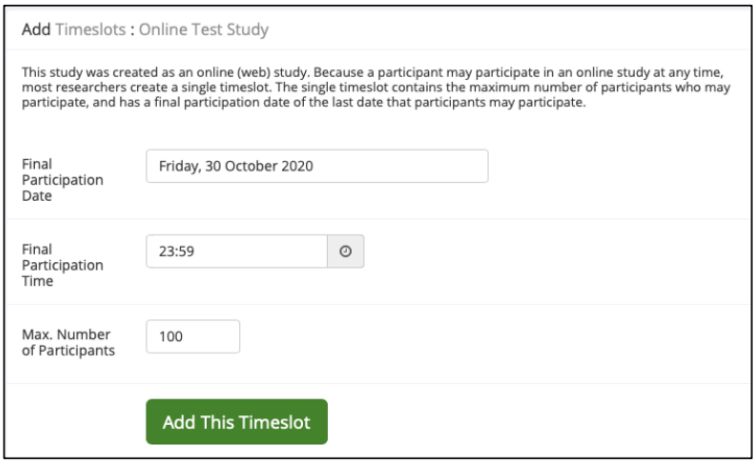
9. How do I set up online external studies?

Select Online External Study. Go through the same steps as for standard studies.

IMPORTANT: Enter the Study URL under ‘Advanced Settings’. To record whether a participant has completed the study include the text %SURVEY_CODE% in the URL. Please check ‘Detailed Help’ for instructions on how to enter the completion URL in your external study platform.



After you have set up the study, go to Study Information, click ‘Study Menu’ and select ‘View/Administer Time Slots’ from the drop down list. Click ‘Add a timeslot’ to add a singlet timeslot. This timeslot will determine the runtime of your study. Enter the final participation date and the maximum number of participants.


Add Timeslots : Online Test Study

This study was created as an online (web) study. Because a participant may participate in an online study at any time, most researchers create a single timeslot. The single timeslot contains the maximum number of participants who may participate, and has a final participation date of the last date that participants may participate.

Final Participation Date: Friday, 30 October 2020

Final Participation Time: 23:59

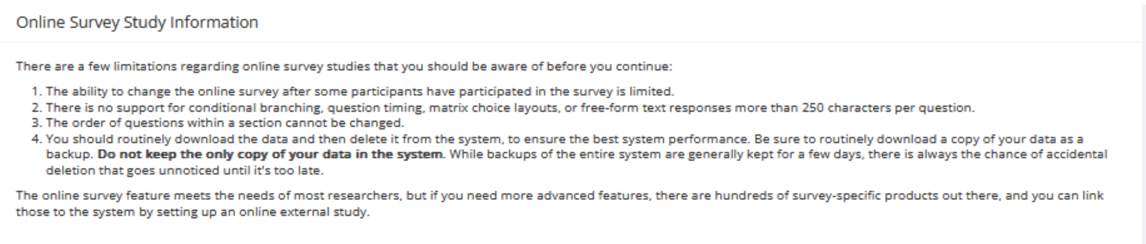
Max. Number of Participants: 100

Add This Timeslot

The maximum number of participants is 999. For online studies, you should always set the number of participants to 999, unless you have already set a specific participant limit.

10. How to set up online internal survey studies?

Select ‘Online Internal Survey Study’.

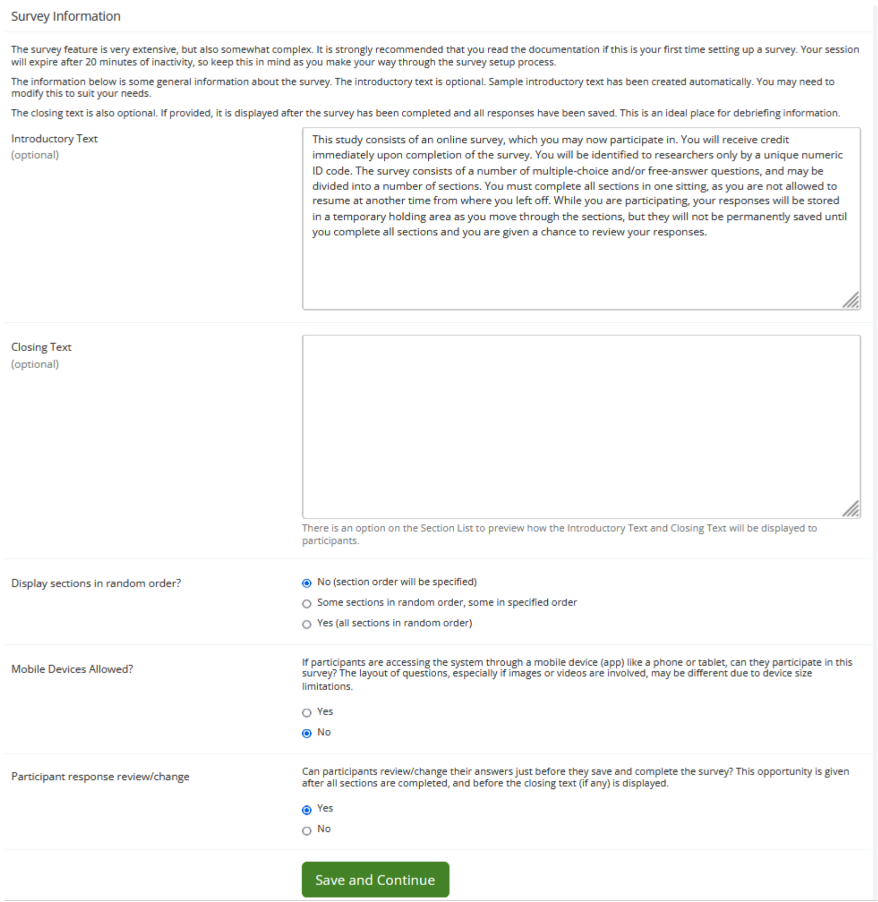

Online Survey Study Information

There are a few limitations regarding online survey studies that you should be aware of before you continue:

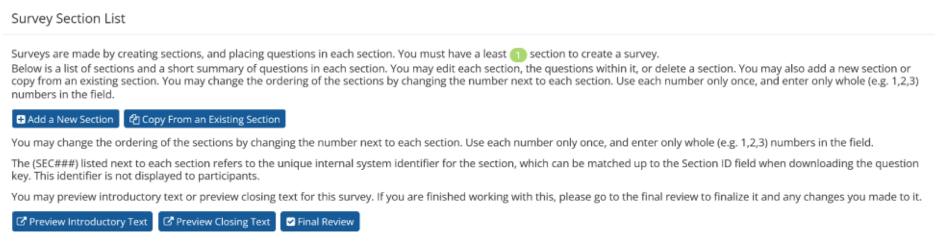
1. The ability to change the online survey after some participants have participated in the survey is limited.
2. There is no support for conditional branching, question timing, matrix choice layouts, or free-form text responses more than 250 characters per question.
3. The order of questions within a section cannot be changed.
4. You should routinely download the data and then delete it from the system, to ensure the best system performance. Be sure to routinely download a copy of your data as a backup. **Do not keep the only copy of your data in the system.** While backups of the entire system are generally kept for a few days, there is always the chance of accidental deletion that goes unnoticed until it's too late.

The online survey feature meets the needs of most researchers, but if you need more advanced features, there are hundreds of survey-specific products out there, and you can link those to the system by setting up an online external study.

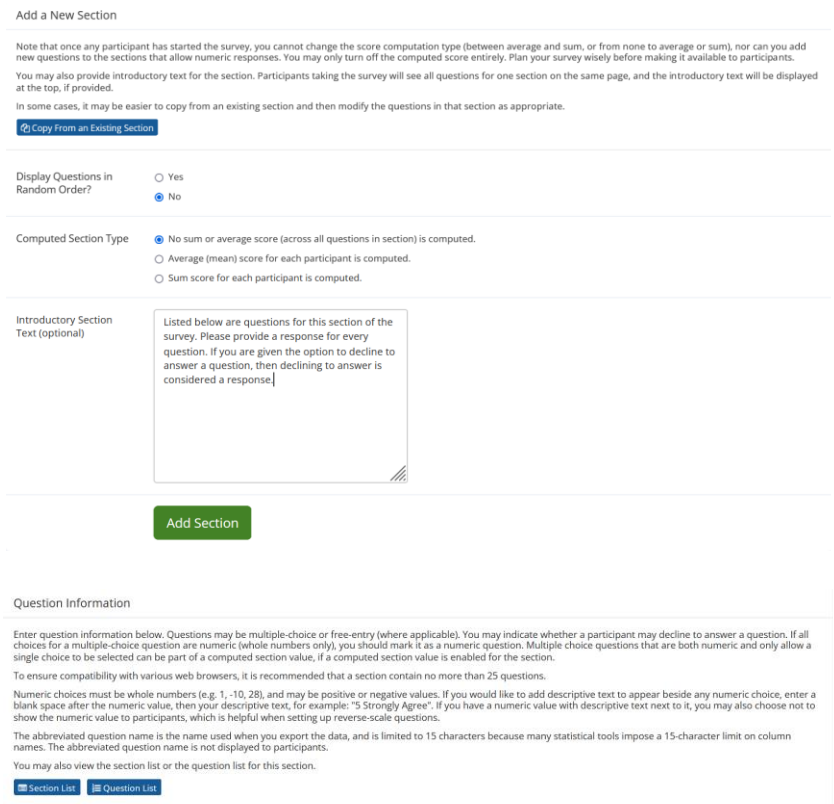
Then fill out the Introductory Text with a short description of the study.



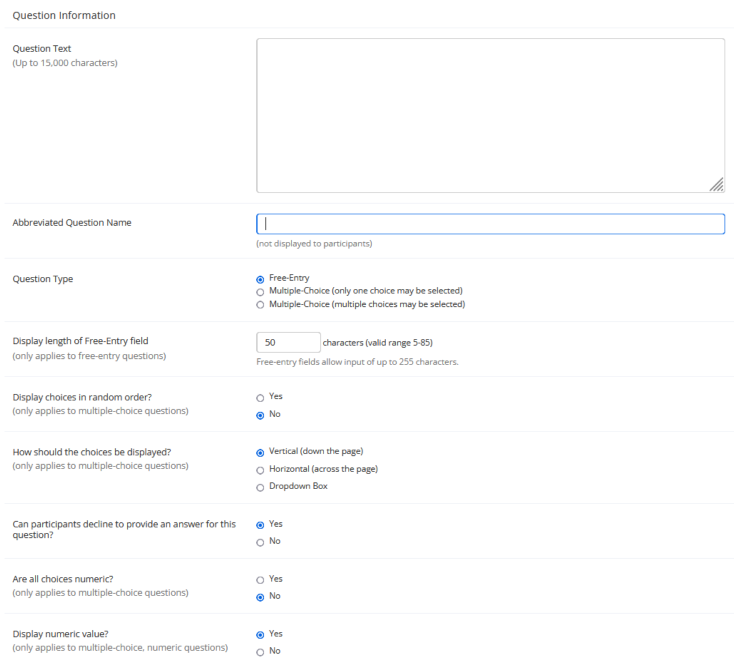
To create a survey, you must have at least one section. To add a section click ‘Add a New section’.



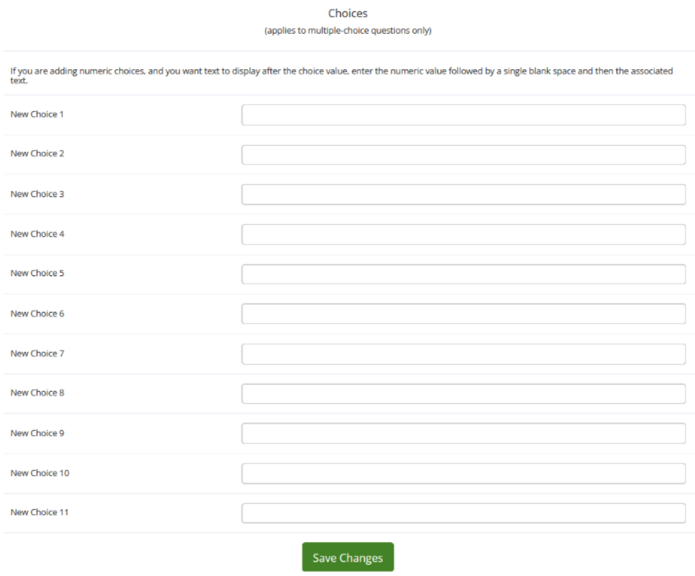
Now create a section.



Then fill in the information about the Question.



If you would like multiple-choice questions in the study follow the instructions below.



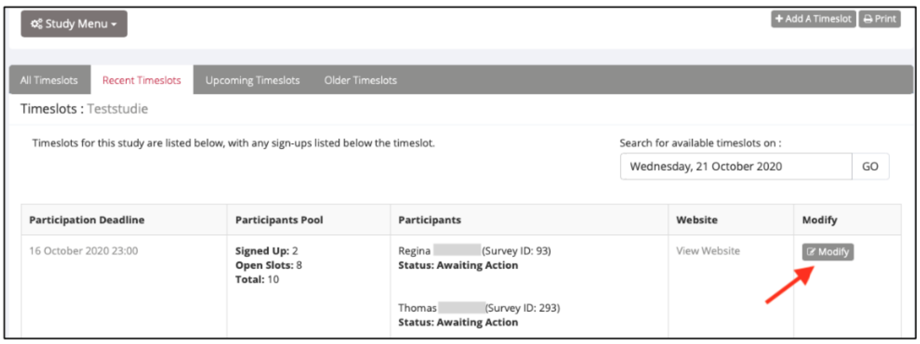
11. Where can researchers check the signups for their studies?

There are two ways to view the signups:

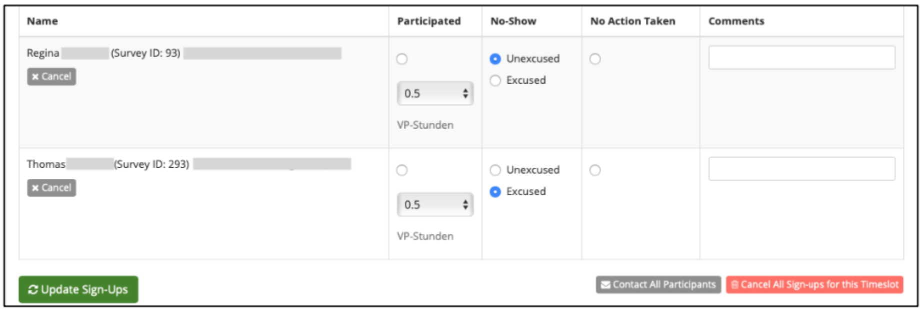
- Go to ‘My studies’ and click ‘View Printer-friendly List of Signups’. Here, you can view the signups for all your studies on a specific day.
- Go to ‘My studies’, click on a specific study, go to ‘Study Menu’, select ‘View/Administer Timeslots’. Here, you can choose between ‘All’, ‘Recent’ or ‘Upcoming’, or select a specific date.

12. How do researchers (Versuchsleitende) mark No Shows and Participations?

Go to Study Menu, click ‘View/Administer Time Slots’, select ‘Recent Time Slots’. Click ‘Modify’.

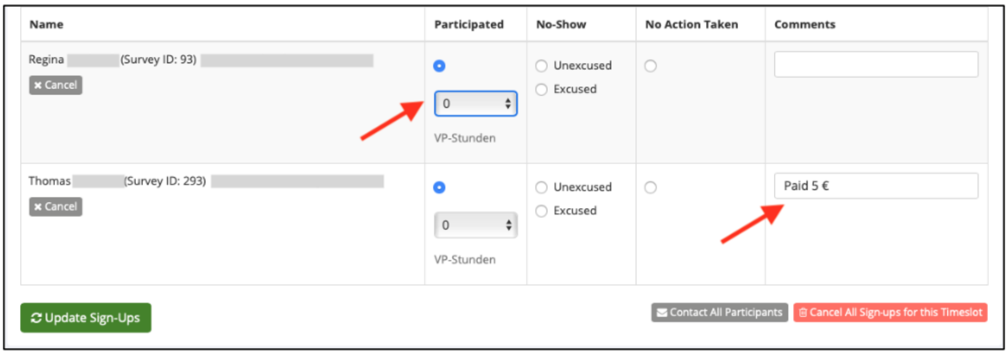


No-Show: Depending on whether the participant provided an excuse or not you can select excused or unexcused No-Show.



Participation: Select ‘Participated’ together with 0 VP-Stunden. If a participant received money instead of VP-Stunden, make a note in the Comments field.

Click ‘Update Sign-Ups’

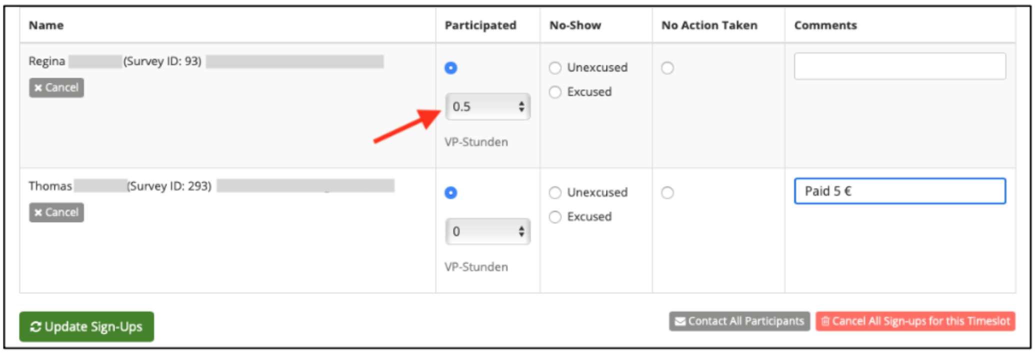


13. How to grant credits (VP-Stunden)?

Go to Study Menu, click ‘View/Administer Time Slots’, select ‘Recent Time Slots’.

Click ‘Modify’. Select the correct number of VP-Stunden per participant.

Click ‘Update Sign-Ups’.



1) <u>Lab studies</u>

2) External online studies

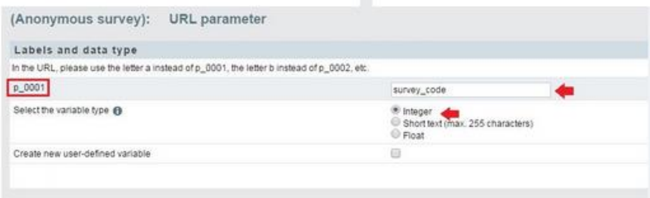
When setting up an external online study, researchers can use SONAs automatic compensation procedure for study credits (VP-Stunden). By using this procedure, participants will automatically receive credit after completing participation. Please note that without using the automatic granting of study credits, compensation of every participant has to be dealt with individually (e.g. by giving individual codes after completing participation). It is also important to know that if you do not configure the automatic granting of VP-Stunden in studies, the participation of the participants is shown as completed, even if the participants have only registered so far.

a. Unipark

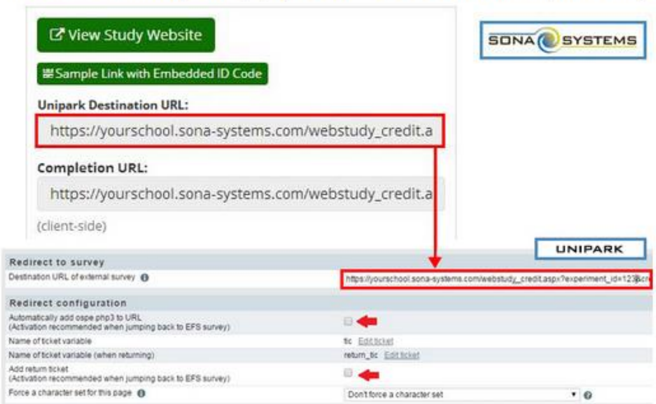
To set the automatic granting of VP-Stunden in unipark follow the steps below.

1. On your Sona Systems site, change the Study URL so it includes ?a=%SURVEY_CODE% in the URL. So if the Unipark URL is:
https://www.unipark.de/us/university/a5a1
then change it to
https://www.unipark.de/us/university/a5a1?a=%SURVEY_CODE%

2. Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "Unipark Destination URL". In Unipark, configure the survey to accept the survey code number, as a user-defined variable. Remember to use lower-case as this is case-sensitive. To do this, go to Project Properties | Survey Options | User-defined Variables and create a new variable of type Integer, and name it "survey_code". Be sure Unipark labels it p_0001.



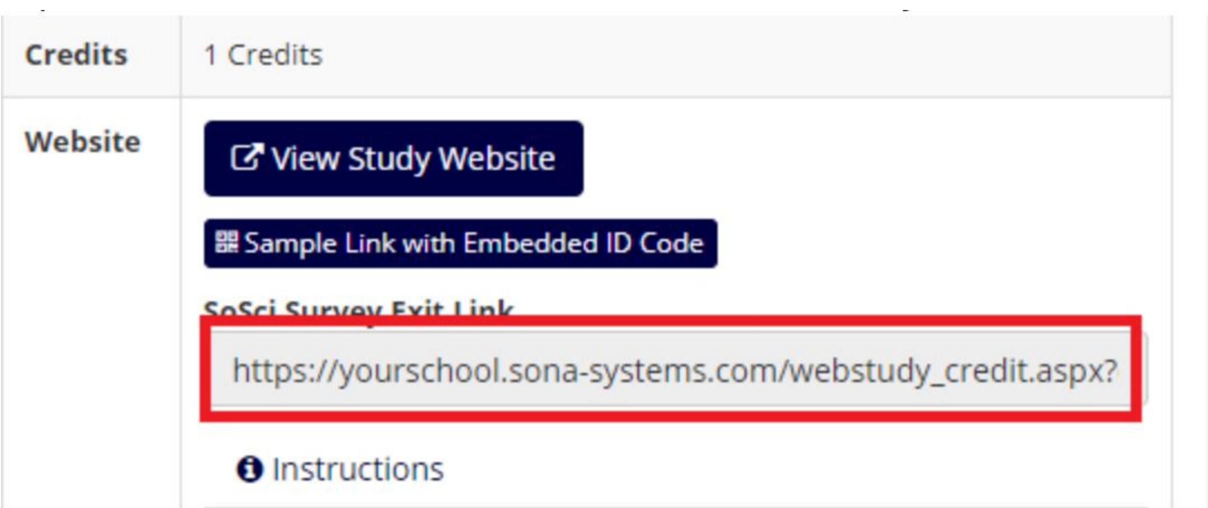
3. In Unipark, go to Questionnaire Editor | Questionnaire | Final Page | Properties, then for the Redirect to Survey section provide the Unipark Destination URL value from your Sona Systems site. (You may simply copy and paste the unaltered value from Sona into Unipark). Then, UN-check the "Automatically add ospe.php3 to URL" and "Add return ticket" options if they are currently checked.



b. SoSciSurvey

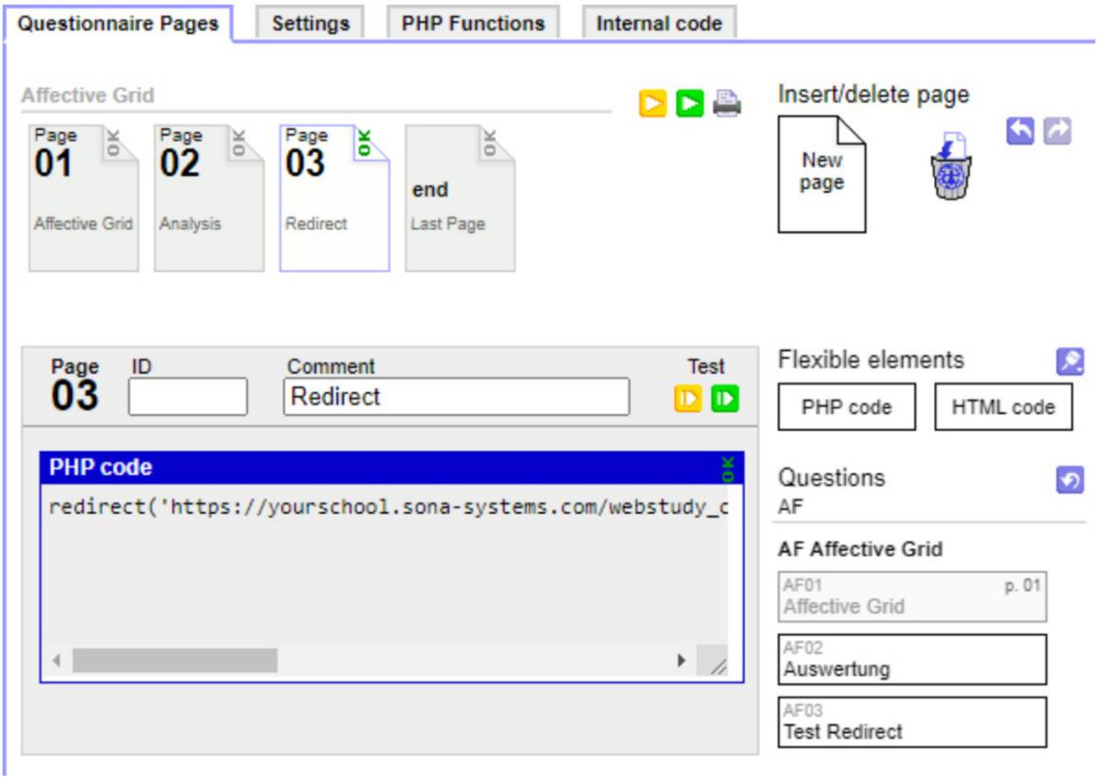
On your Sona Systems site, change the Study URL so it includes ?r=%SURVEY_CODE% in the URL. So if the SoSci Survey URL is:
https://www.soscisurvey.de/test246388/
then change it to
https://www.soscisurvey.de/test246388/?r=%SURVEY_CODE%

After having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled “SoSci Survey Exit Link”. Copy this URL.
(e.g. https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code=%reference%)



In SoSci Survey, add a Redirect page at the end of your questionnaire. Drag “PHP code” into the page content area in the middle so you have a “PHP code” area. Then put in a redirect line similar to the below. The **false** is needed to tell that the user is done with the survey to be marked as complete on SoSci Survey.

```
redirect('https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_
```



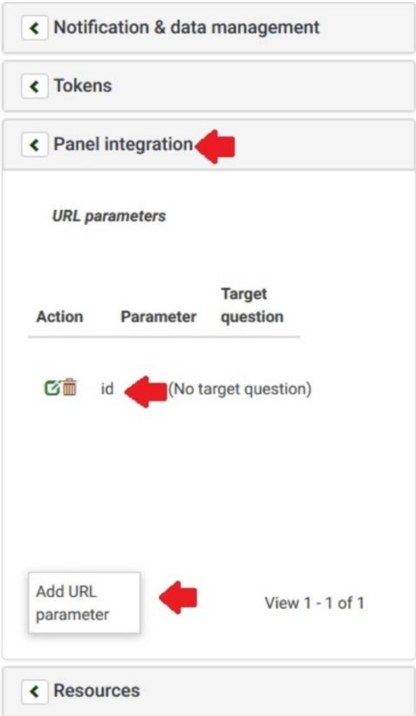
A few tips:

- The integration may not work if your survey has a goToQuestionnaire () call in it. Instead, use a multiLevelDown () call and use the data option to transfer the reference.
- In Step 1, if your SoSci Survey URL (before you add ?r=%SURVEY_CODE% to it) already has a ? in it, then add &r=%SURVEY_CODE% to it.
- In Step 2, if you see Completion URL instead of SoSci Survey Exit Link, this could indicate you are using a university-hosted version of SoSci Survey and our system has not detected it's SoSci Survey. In that case, please have your administrator contact us and we can update the detection code.

c. LimeSurvey

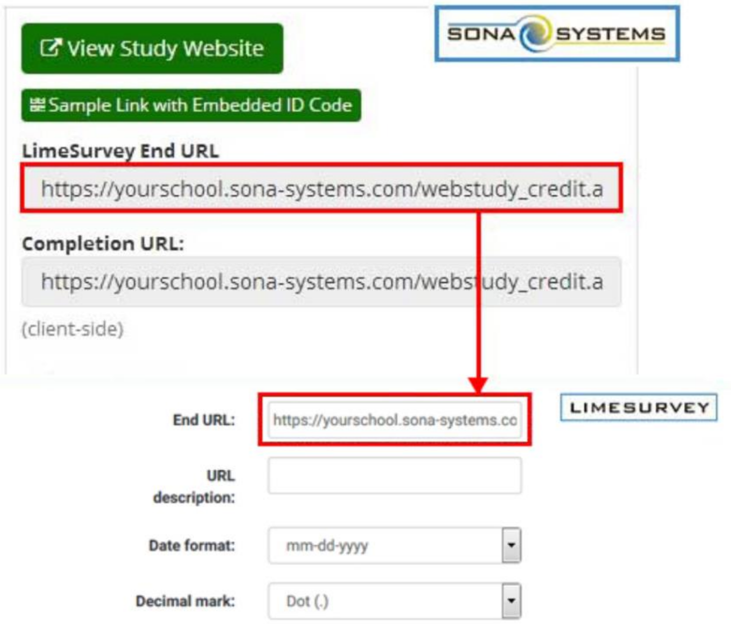
On your Sona Systems site, change the Study URL so it includes &id=%SURVEY_CODE% in the URL. So if the LimeSurvey URL is:
https://limesurvey.yourschool.edu/index.php?r=survey/index&sid=/651365&/lang-en
then change it to
https://limesurvey.yourschool.edu/index.php?r=survey/index&sid=/651365&/lang-en&id=%SURVEY_CODE%
Note: In versions of LimeSurvey prior to 2.50, the LimeSurvey URL format was different and you will need to upgrade your LimeSurvey to use the integration.

Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "LimeSurvey End URL". In LimeSurvey, configure the survey to accept the survey code number, as URL Parameter named "id". To do this, go to Survey Properties | General Settings & Texts | Panel Integration and add the URL parameter there, with no target question. Remember to use lower-case as this is case-sensitive, and be sure to click Save for both the new parameter and survey settings.



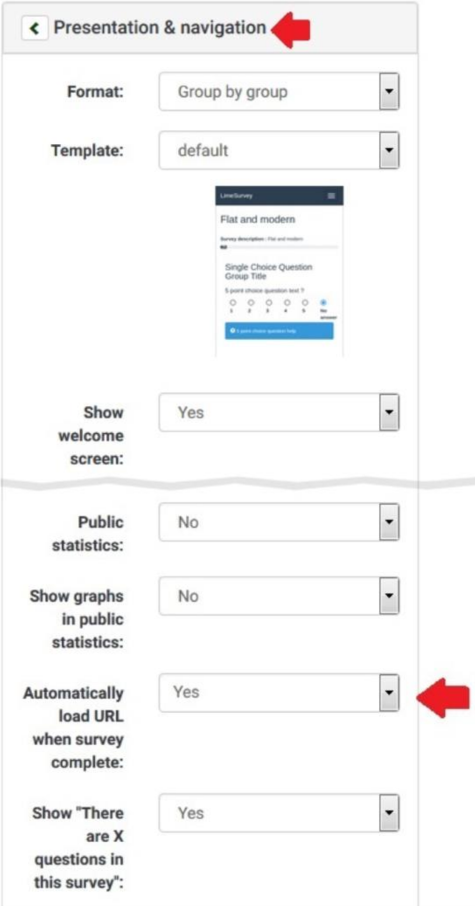
If you would like to track within the responses, the code from the participant, so you can match it up to their sign-up on your Sona Systems site, then you should specify a target question. Make sure the target question is set to Hidden, and the Question Type is set to Short Free Text. A question is made hidden in the Advanced Settings for a question, in Display | Always hide this question.

In LimeSurvey, configure the End URL (in Survey Properties | General Settings & Texts | Edit Survey Text Elements and Settings), and provide the LimeSurvey End URL from your Sona Systems site. The LimeSurvey URL should look something like this:
https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code={PASSTHRU:id}



If (and only if) you do not see a LimeSurvey End URL on your Sona Systems site, then proceed with the rest of this step. Otherwise, proceed to the next step. In LimeSurvey, configure the End URL (in Survey Properties | General Settings & Texts | Edit Survey Text Elements and Settings), and provide the Client-Side Completion URL from your Sona Systems site. However, you need to change the XXXX at the end of the URL, and instead have LimeSurvey put in the survey_code number passed as a pass-through variable. So if the client-side completion URL was:
https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code=XXXX
then enter it in LimeSurvey as
https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=4e48f9b638a&survey_code={PASSTHRU:id}

In LimeSurvey, set “Automatically load URL when survey complete?” to Yes on in Survey Properties | General Settings & Texts | Edit Survey Text Elements and Settings | Presentation & Navigation.



These features are described on LimeSurvey's site at the following URL: ("URL Fields") https://manual.limesurvey.org/URL_fields

14. What do researchers do after the study is completed?

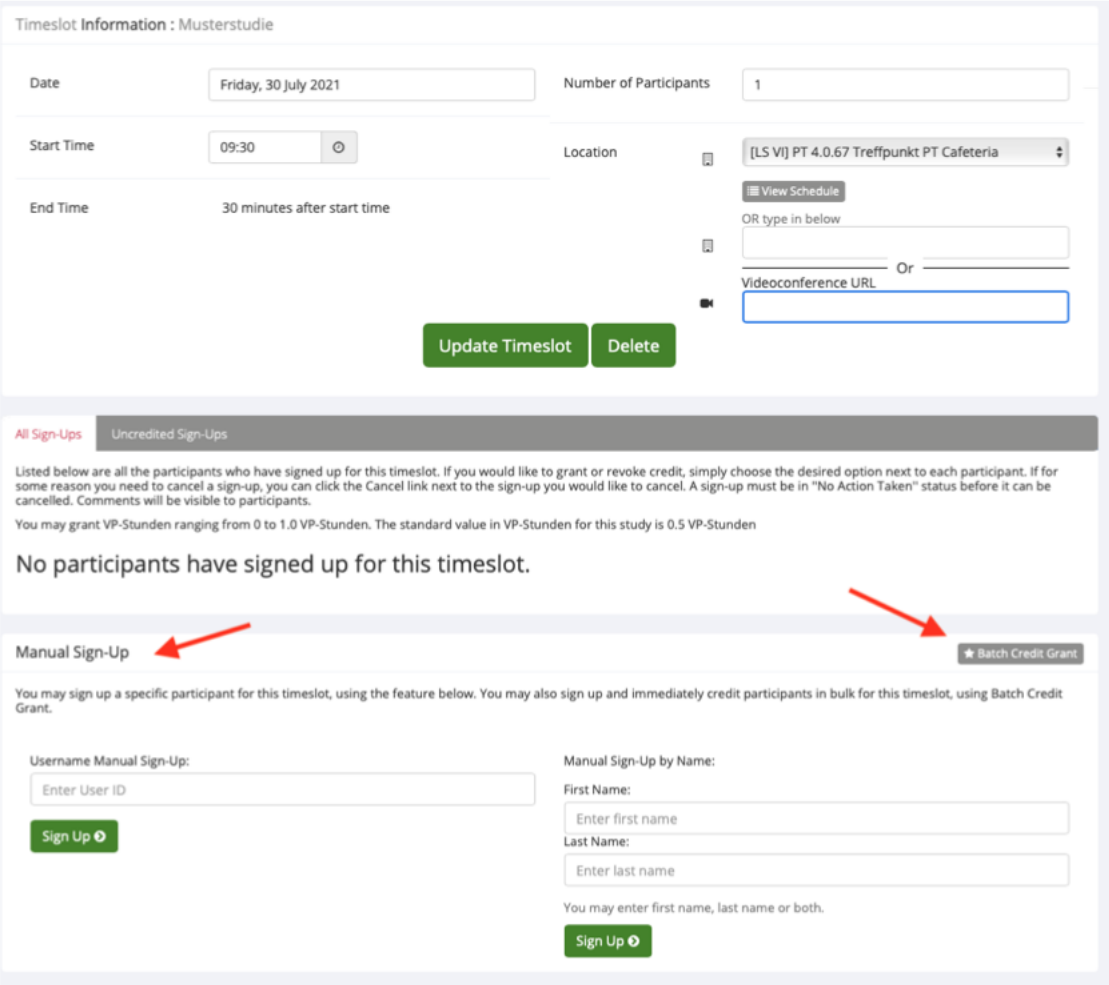
- Review whether all participants have been assigned credit (or marked as No-Show, if applicable). There should be no participant with the status 'awaiting action'.
- Go to 'Study information' and set the study to 'inactive'.

15. I recruited participants outside of Sona / before Sona was introduced. How can I assign credit and save study participation in Sona?

You can manually sign up participants and assign credit for a study in Sona.

To do this, set up a new study. Select 'approved' and 'inactive' (so participants cannot see the study). Set up a single time slot for this study. Set the number of participants equal to the number of participants you want to assign credit to. Go to this time slot and click 'modify'. Go to 'Manual Sign Up' (see screenshot below). Type in the user name or the user ID. Sign up the participant. Then, select the number of VP-Stunden and click 'participated'.

If you want to sign up several participants, you can alternatively choose ‘Batch Credit Grant’. For this option, you need the user IDs to sign up participants.



16. Why is my study not visible to participants?

- Your study must be labelled as ‘approved’ in ‘Study Information’.
- You must select ‘active’ in ‘Study Information’.
- You must set up timeslots for the study that are scheduled more than 24 hours in the future. This is necessary for all study types, including online studies.

17. How can I set up multi-part studies, if the number of parts varies between conditions?

There are two alternatives approaches of implementing this:

(A) Set up a multi-part study with as many parts as are planned in the longest condition (e.g. 3 parts). Explain in the abstract that in one condition only 2 parts will take place, and that participants will be informed after sign up whether they will participate in the 2-part or 3-part condition. After participants have signed up, cancel part 3 for those participants who are in the 2-part condition. VP- Stunden are assigned separately for each part.

(B) Set up a separate multi-part study for each condition. For instance, study A has 3 parts and study B has 2 parts.

18. How can I set up multi-part studies, if the delay between the parts varies between conditions?

Example: The delay in condition 1 is 2 days and the delay in condition 2 is 4 days.

(A) Set up a multi-part study with 3 parts. Part 2 is scheduled with a delay of 2 days and part 4 is scheduled with a delay of 4 days. Explain in the abstract that depending on condition part 2 or part 3 will be canceled, and that participants will be informed after sign up which part(s) will be canceled. After participants signed up, cancel part 2 or part 3, depending on the condition participants have been assigned to. VP-Stunden are assigned separately for each part.

(B) Set up a separate multi-part study for each condition. For instance, study A has 2 parts with a delay of 2 days and study B has 2 parts with a delay of 4 days.

19. Where can I find more information?

Please, check the User manual from Sona Systems at:

https://www.sona-systems.com/support/docs/ems_docs.pdf

For questions about Lime Survey or SoSci check the following help pages:

https://www.sona-systems.com/help/limesurvey/

https://www.sona-systems.com/help/soscisurvey/