



SONA Participant Management System

Guide for Researchers and Principal Investigators

This documentation applies to both researchers and principal investigators (P.I.s). P.I.s can perform all the same functions on a study as a researcher, which allows the him/her to operate in an oversight role and monitor the progress of their studies, or step in on behalf of the researcher when necessary. Because the privileges are the same, throughout this documentation, the term “researcher” may be used interchangeably with “principal investigator” except where otherwise noted.

System Basics

The SONA Experiment Management System is a highly configurable web-based interface for scheduling and managing research participants in studies using human subjects. Researchers create their studies in the SONA program, schedule and deliver the data collection sessions, and grant or revoke participation credits following the session.

In-person or on-line studies are created and have either single or multiple session timeslots for data collection. By viewing a list of active studies with their available timeslots eligible subjects will sign-up to participate. Researchers will grant or revoke credit to participants after the session occurs, and on-line studies can be configured to automatically grant credit.

Your SONA Researcher account

DO NOT use the Request Account button, this is only for participants and participant accounts have an entirely different set of privileges, which are not appropriate for a researcher.

Once your study receives full ethics approval, an email containing your SONA User ID, a temporary password, and link to SONA will be sent to the email address that you used to submit your ethics proposal.

Using this initial temporary password, you can login to SONA at any time, however it's probably best to log in as soon as you receive the temporary password and create your own password.

For security purposes, logged on sessions expire after a certain period of inactivity, usually 20 minutes. If this happens, just log in again. When you're done using the system it's better to log off to prevent any problems that may arise if someone uses your computer before the session expires.

Retrieving a Lost Password

If you forgot your password, click the Forgot Password button on the main login page and another one will be emailed to you momentarily. If you provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address taken from your account profile. If the requested password has not arrived after 30 minutes, then check in your email program's junk mail folder in case the email was delivered there.

Changing Your Password and Other Information

To change your password or other information, choose My Profile. It is recommended you provide a phone number and office location, as most human subject committees require that this information be made available to research participants. If you are a researcher, this contact information will be displayed to participants when they view information about the study. If you are a principal investigator, this contact information will be displayed if a participant explicitly chooses to view it (since the researcher is the primary point of contact for a study).

Email Options

Certain events in the system will cause an email notification to be sent to you, such as notifications that a participant has signed up or cancelled their sign-up for your study. In addition, your email address is displayed to the participant when they view information about the study, in case they need to contact you with questions. If you do not specify an alternate email address in your SONA researcher profile (i.e. hotmail or gmail), the default email address is your UW webmail address.

Logging Out

When you are done using the system, choose Logout. You are logged out when the main log in page is displayed. It is always a good security practice to close all your web browser windows as well, especially if you are using a computer that is shared by others.

Creating Your Study

Before you begin creating your study, review the SONA Manual for Researchers posted on thesis website. A summarized checklist indicates only the main tasks involved in running your subject participation. Refer to the manual for in-depth explanation. Remember, once you have prepared your study, prepared your timeslots and pre-booked your classroom, your study must be approved by the SONA administrator. There is a step to request the approval.

Interpersonal Communication in Human Research Participation

It is important to understand that your role as a research agent of the department requires assured professionalism and dignity while interacting with your participants. You should not express nor endure any form of harassment. Please report any mistreatment or concerns to your advisor, the thesis class instructor, or the research administrator. Participants have the same right and obligation to report to the Psychology Department any perceived threat, unprofessionalism, or apprehension of their own.

Checklist for Researchers

Study
Status

Participant
View

1	Receive Ethics Approval and SONA user id.	You will receive an e-mail from the Research Coordinator notifying you of ethics approval and soon thereafter your SONA user account will be created for you and a temporary password will be e-mailed to you.		
2	Log in to SONA	Initiate your account and create your own password.		
3	ADD your New Study	<p>Create your study using the title, descriptions, and recruiting information that you submitted with your ethics. Enter any characteristics, prerequisites, etc. Continue to scroll down to the lower part of the screen to complete the study set up, or to change study information of an existing study.</p> <p>If necessary, refer to the researcher manual on the thesis class website for Adding A Study and Working with Timeslots.</p>	Inactive	Study is not viewable.
4	Important: Book your on-campus study location BEFORE creating the timeslots in Sona.	<p>For Psychology departmental space, such as computer room 4L29, Group Testing 4L28 or any other department room or Lab you MUST contact Carolynn the Department Assistant c.smallwood@uwinnipeg.ca Have the dates and timeslots ready to request and adjust if necessary for mutual availability.</p> <p>To request University campus space, you must use the on-line request at http://uwinnipeg.ca/academic-scheduling/academic-scheduling-booking-request.html and provide all details including your reason: i.e Thesis data collection under supervisor's name. (cc. Carolynn please)</p>	Inactive	Study is not viewable.
5	Prepare your timeslot(s).	<p>Add your timeslots in Sona. On-line studies have One timeslot for ALL subjects, with an expiry date being the last day participants can access the survey.</p> <ul style="list-style-type: none"> Configure the Qualtrics connection if applicable, and to auto credit participants—see instructions on next page. <p>In-lab timeslots are created individually and you enter in the location, number of participants etc.</p> <ul style="list-style-type: none"> Remember to always update your screen to save edits. 	Inactive	Study is not viewable and timeslots are NOT yet available for sign-up.
6	Request approval of your study.	After timeslots are created, you must request approval via Change Study Information screen . (Only when timeslots are set up can the administrator approve your study.)	Inactive	Cannot yet be viewed by students until Active.
7	Turn on your study to make it available for sign-up.	<p>Once approved and you are ready for sign-ups the RESEARCHER must change study status to ACTIVE using the change study information screen.</p> <p>Rem: UPDATE the screen.</p>	Active	Your study can be viewed and timeslots are available for sign-up.
8	Carry out Sessions & Take Attendance	<p>Monitor your sign-ups, prepare your study materials; photocopy consents, feedback and tests (in advance);</p> <p>Post directional signs to obscure locations, and door signs. Take Attendance using your sign-up roster.</p>	Active	Participants can sign up as long as timeslot space is available.
9	Grant Credits	After each session, promptly go to your study and Modify the Timeslot to record attendance and grant credit to each participant or report an absence, and update timeslot to actually post the credits.	Active	
10	End Study	When you have completed your data collection, change the study status back to <u>Inactive</u>	Inactive	Cannot be viewed by students.

Automatic Sona Credit through Qualtrics

To create (or modify) a study that will allow Sona System to automatically credit participants upon completion of an external study, researchers will need to modify their current study's configuration on both the Sona System and Qualtrics platforms.

First Steps

This guide assumes that you already have a study created on Qualtrics and a corresponding approved Sona study. These instructions are to be used after the Sona study and the external Qualtrics study have been created and linked together.

Modifying Your Qualtrics Study

1. Your Qualtrics study will need to read in your participants' unique identification number. To allow Qualtrics to do this, click on SURVEY FLOW.
2. While in SURVEY FLOW, add a new element to the beginning of your survey and select EMBEDDED DATA. In this open field, type in the phrase "id."



Modifying Your SONA Study

1. Go to your Sona study and click on CHANGE STUDY INFORMATION.
2. Scroll a ways down to where it says STUDY URL. This item lets you link your survey out to an external site – if you are currently using Qualtrics, you will already have a link in this box. At any rate, add this exact phrase **?id=%SURVEY_CODE%** to the end of your corresponding Qualtrics survey's web address. Beware: this, along with other entries, is case-sensitive.

Study URL ?SID=SV_207y6vzed4P3jIV&id=%SURVEY_CODE%

If the text %SURVEY_CODE% is included in the URL, the system will replace the participant, to make it easier to identify who completed the study. If you are using Qualtrics, add "&id=%SURVEY_CODE%" to the end of study in Qualtrics and set up a spot for embedded data in the survey flow (screenshot).

Now, any time a student clicks on your study's link, Sona will populate the "SURVEY_CODE" string with its own unique identifier.

3. When you save your changes, Sona will redirect you to your study's information. Now, you will see a new field in your study information for your COMPLETION URL. Copy this link (that is, copy to clipboard and you'll be pasting it shortly).

[Sample Link with Embedded ID Code]

Completion URL:

https://auburn.sona-systems.com/webstudy_credit.aspx?experiment_id=320&credit_token=28d24523db8a475ba3b374b8a282ea86&SURVEY_CODE=XXXX (client-side)

1. Now, we need a way to let Qualtrics communicate with Sona the same ID number that was originally fed into the system. Go back to your Qualtrics study and click on SURVEY FLOW. Add a new element to the end of your survey and select END OF SURVEY. Next, select “Customize” and “Redirect to a URL...”
2. Paste the COMPLETION URL you copied from Sona in the “Redirect to a URL...” field. Finally, remove the “XXXX” and “(client-side)” from the URL and add the following (sans quotation marks): “\${e://Field/id}”.

Customize End Of Survey

- Default end of survey message.
- Redirect to single response report.
- End of survey message from the **Library**...
- Redirect to a URL ...

3. Save your work. You are done!
4. When students complete your survey, they will be guided to this URL that contains the integer that was saved as the “id” (earlier from the survey), and Sona will recognize this unique code and grant the student credit. You can test the functionality of your studies using our fake participant account (username: p; password: banana).