

# Creating and Managing a Standard Lab Study

This is a dedicated tutorial for creating a standard lab study (i.e., one where participants would physically come to a location like the research suite or classroom) on Sona. It illustrates every step from adding a new study through creating timeslots and granting credit or no-shows. Follow this tutorial exactly to avoid any problems with your study on Sona.

## 1. Adding a Study

This is what the home screen looks like when you sign into Sona as a researcher. Notice that there are two buttons to choose from to add a new study. On the following page, 'Standard Study' **must** be selected.

The image shows two screenshots of the Sona researcher interface. The top screenshot is the home screen, and the bottom screenshot is the 'Add New Study' selection screen.

**Home Screen:**

- Header: Department of Psychology Participant Pool
- Navigation: My Studies, All Studies, **Add New Study** (highlighted with a red box and an upward arrow), Prescreen Results, My Profile, Logout
- User: Zared Shawver (Researcher)
- My Studies: View and edit your studies, View, add or edit timeslots, View uncredited timeslots (0)
- All Studies: View all studies available to participants
- Add New Study: **+ Create a new study** (highlighted with a red box and a leftward arrow)
- Upcoming Appointments: No Upcoming Appointments
- Studies with Recent Activity: Zared's Study - No One Should Complete this (January 5, 2016)

**Add New Study Selection Screen:**

- Header: My Studies, All Studies, **Add New Study**, Prescreen Results, My Profile, Logout
- User: Zared Shawver (Researcher)
- Select study type
- To add a new study, you must first select the type of study you would like to add. You may not change a study to a different type once you have added it, so please be sure to select the correct type of study now.
- Standard Study** (selected, highlighted with a red box and a rightward arrow): A study that is scheduled to take place at a specific place (i.e. not online), and where there is only one part to the study that participants will participate in.
- Two-Part Standard Study**: A study that is scheduled to take place at a specific place (i.e. not online), in two parts. The two parts may be scheduled to take place a specified number of days apart, and a participant must sign up for both parts of the study at one time.
- Online Survey Study**: An online survey study that is set up in the system, and administered by the system.
- Online External Study**: An online study that is set up outside the system (i.e. on another website).
- Continue** button (highlighted with a red box)

## 2. Necessary Study information

You must pay very close attention to the information that you place online about your study. It should be descriptive, yet brief and not too revealing. Be direct. Tell participants enough for them to be informed when they sign up. A good example of a 'Brief Abstract' is "This experiment tests the effects of different types of phrases on problem solving." A good example of a 'Detailed Description' is "You will be asked to read through several scenarios containing problems and come up with solutions that you think will work the best." Simple, direct, and to the point. Of course, each study will be different. Work out what will be best for your study's purpose.

You should know before you create your study roughly how long it should take participants. Indicate that here **only in increments of 30** and adjust the number of credits accordingly. The Academic Technician will adjust the number of hours allowed to match the number of credits your study was allocated.

Study Information

Please enter information below about the study. The study name may not be the same as any other studies, to avoid confusion. All fields are required unless otherwise marked. Only the administrator may approve a new study so that it is visible to participants.

If you are creating a simple study, you only need to complete the Basic Study Information section. More advanced options, including pre-requisites and email notification options are available in the other sections of the form.

### Basic Study Information

Study Name	<input type="text"/>	<b>Give a name that is descriptive, but not too revealing or long</b>
Brief Abstract	<input type="text"/>	<b>In about a sentence, what is your study about? Don't be too revealing.</b>
Detailed Description	<input type="text"/>	<b>Here is where you describe, roughly, what participants will do. You are not to write what the researchers think, what the study's hypotheses are, what you hope to find. For example, "participants will read a few passages and answer questions about them."</b>
Eligibility Requirements	<input type="text" value="None"/>	<b>From Prescreen</b>
Duration	<input type="text" value="30"/> <input type="text" value="Minutes"/>	<b>In increments of 30</b>
Credits (Credits must be evenly divisible by 1)	<input type="text" value="1"/>	<b>1 credit = 30 min</b>
Timeslot Usage Limit	<input type="text" value="75"/> <input type="text" value="Hours"/>	75(only the administrator may change this value)
Preparation (Up to 255 characters, optional)	<input type="text"/>	<b>This is very study specific, you likely will not have to use this</b>

Find your name (and any other researchers on the project) in the box on the left and click on it so that it appears in the box on the right. In the drop down menu, select the professor advising on the project.

Researcher

<input type="text"/>	<div><ul style="list-style-type: none"><li>Ammerman, Aaron</li><li>Baumgardner, Megan</li><li>Foong, Julie</li><li>Gowing, Stephanie</li><li>Guo, Cai</li><li>Hoppers, Leanne</li><li>Jansen, Jessie</li><li>Kaufman, Hannah</li><li>Kruchten, Rachel</li><li>Marshall, Taylor</li></ul></div>	<input type="text" value="Shawver, Zared"/>
	Available	Selected

Principal Investigator

<input type="text" value="Shawver, Zared"/>
---

If you wish, enter your 'IRB Approval Code,' or just send the Academic Technician a copy of the approval. Be sure that you indicate that your study is 'Active,' meaning that you are ready to begin collecting data upon approval. The Academic Technician will review and approve your study.

IRB Approval Code (optional) Code not required, but IRB approval letter must be sent to Technian for study approval

Approved? Currently not approved – Approval is required.

Active Study?  Yes  
 No

(inactive studies are sometimes kept for historical purposes; a study must be active and approved to show up on the list of available studies to participants)

### 3. Optional Study information

'Pre-Requisites' and 'Disqualifiers' specify which participants can and/or cannot participate in your study. That is, if their eligibility depends on previous studies that they have taken. For example, if a current study is very similar to one that you have conducted in the past it may cause participant bias because they would know too much about your current study.

Pre-Requisites  Participants must participate in ALL of these studies before they may sign up  
 Participants must participate in AT LEAST ONE of these studies before they may sign up

My Studies All Studies

search...

Study Code: ALABAMA\_Social Interactions among College Women (Inactive)

Study code: ALASKA\_Responses to Infidelity (Inactive)

Study code: ALASKA\_Responses to Infidelity\_Online (Inactive)

Study Code: ARIZONA\_Personality and Thinking Styles\_Online (Inactive)

Study Code: ARKANSAS\_The Collegiate Test Anxiety Inventory\_ONLINE (Inactive)

Study Code: California\_Personality Traits Available

Selected

---

Disqualifiers Participants must not have participated in ANY of these studies before they sign up:

My Studies All Studies

search...

Study Code: ALABAMA\_Social Interactions among College Women (Inactive)

Study code: ALASKA\_Responses to Infidelity (Inactive)

Study code: ALASKA\_Responses to Infidelity\_Online (Inactive)

Study Code: ARIZONA\_Personality and Thinking Styles\_Online (Inactive)

Study Code: ARKANSAS\_The Collegiate Test Anxiety Inventory\_ONLINE (Inactive)

Study Code: California\_Personality Traits Available

Selected

## 4. Finalizing your Study

Because this is an in-person lab study you do not want to make your study available for participants to view outside of the lab. If there is any type of URL associated with your study, you should not under any circumstances, put it on Sona.

Is this a web-based study?	<input checked="" type="radio"/> No
Study URL (optional)	<b>DO NOT PUT ANYTHING IN THIS BOX</b>

You can adjust these numbers based on your preferences. There is no formal policy on how late a participant can sign up for or cancel timeslots for your study. That is, if you don't mind participants signing up for your study 1 hour before it begins you can certainly do that. Be advised, though, that **you**, as the researcher are responsible for being in the research suite for **all** of your timeslots. Do not make the deadlines too soon before a study that you miss your appointments.

Participant Sign-Up Deadline	<input checked="" type="text" value="24"/> hours before study is to occur
Participant Cancellation Deadline	<input checked="" type="text" value="24"/> hours before study is to occur

Again, there is no formal policy on receiving emails for sign-ups and cancellations. They are just helpful when planning for running participants.

If there is more than one researcher on your study you may wish to allow researchers to be assigned to specific timeslots. This allows you to run more than one participant at a time in the research suite. However, this needs to consider the needs of other research suite users.

**Always** be sure that 'No' is selected for the option of participants signing up for your study multiple times.

Should the Researcher receive an email notification when a participant signs up or cancels?	<input checked="" type="radio"/> No <input type="radio"/> Yes -- for sign-ups and cancellations <input type="radio"/> Yes -- for cancellations only	<b>Personal Preference</b>
Researchers at Timeslot-Level	Can researchers for this study be assigned to specific timeslots? <small>Only applies if the study has more than one researcher.</small> <input type="radio"/> Yes <input checked="" type="radio"/> No	
Can a participant sign up for this study more than once? (at different times)	<input type="radio"/> Yes <input checked="" type="radio"/> No	


Comments are not necessary, but can be helpful. Use them as you wish.

Once you have entered all of your information you are free to click 'Add This Study.'

Shared Comments (Up to 1,000 characters, optional)	<b>Most people don't use this.</b> <small>Visible to all researchers and PIs in the system, but not visible to participants</small>
Private Comments (Up to 3,000 characters, optional)	<b>Most people don't use this.</b> <small>Visible only to researchers and PIs for this study, but not visible to participants or other researchers/PIs in the system</small>
Research Alternative	No
<input checked="" type="button" value="Add This Study"/>	

## 5. Completed Study

This is what your completed study should look like before you have received approval. If your information is entered correctly (i.e., proper credit 'Duration,' concise and direct 'Abstract' and 'Description,' adequate 'Sign-up' and 'Cancellation Deadlines,' and correct 'Researcher' and 'Principal Investigator') you should email the Academic Technician to request Approval for your study.

Study Information	
Study Name	This is a tutorial study for creating timeslots
Study Type	 <b>Standard (lab) study</b> This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Study Status	<b>Not visible to participants:</b> Not Approved <b>Active study:</b> Does not appear on list of available studies -- must also be approved
Duration	30 minutes
Credits	1 Credits
Abstract	This is not a real study
Description	This study is to show people how to create timeslots and grant credit.



  

Restrictions	
Prescreen Restrictions	No Restrictions <a href="#">View/Modify Restrictions</a>


  

Additional Study Information	
Timeslot Usage Limit	75 hours (approximately 150 signups)
Participant Sign-Up Deadline	24 hours before the study is to occur
Participant Cancellation Deadline	24 hours before the study is to occur
IRB Approval Code	
Direct Study Link	<del><a href="https://dickinson-sona-systems.com/default.aspx?p_">https://dickinson-sona-systems.com/default.aspx?p_</a></del> This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	January 6, 2016

Researcher Information	
Researcher	Zared Shawver 
Principal Investigator	Zared Shawver 

Note that the '75 hours' in the 'Timeslot Usage Limit' box is the default amount and the Academic Technician will adjust this. Notice, also, that the 'Direct Study Link' is crossed out. This is because you should ***never*** email your link to any participants, students or not. Here is what your study will look like after the Academic Technician modified and approved it. If your study requires that only certain participants can complete your study based on the the prescreen, you should indicate that now by clicking 'View/Modify Restrictions' in the 'Prescreen Restrictions' box.

Study Information	
Study Name	Study Code: WYOMING_ This is a tutorial study for creating timeslots
Study Type	 <b>Standard (lab) study</b> This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Study Status	<b>Visible to participants:</b> Approved <b>Active study:</b> Appears on list of available studies
Duration	30 minutes
Credits	1 Credits
Abstract	This is not a real study
Description	This study is to show people how to create timeslots and grant credit.  ** You must bring your Sona ID code with you when you come to participate**  ** This study's code is WYOMING; You must remember that when you come to participate**



  

Restrictions	
Prescreen Restrictions	No Restrictions <a href="#">View/Modify Restrictions</a>

Additional Study Information	
Timeslot Usage Limit	50 hours (approximately 100 signups)
Participant Sign-Up Deadline	24 hours before the study is to occur
Participant Cancellation Deadline	24 hours before the study is to occur
IRB Approval Code	
Direct Study Link	<del><a href="https://dickinson-sona-systems.com/default.aspx?p_">https://dickinson-sona-systems.com/default.aspx?p_</a></del> This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	January 6, 2016

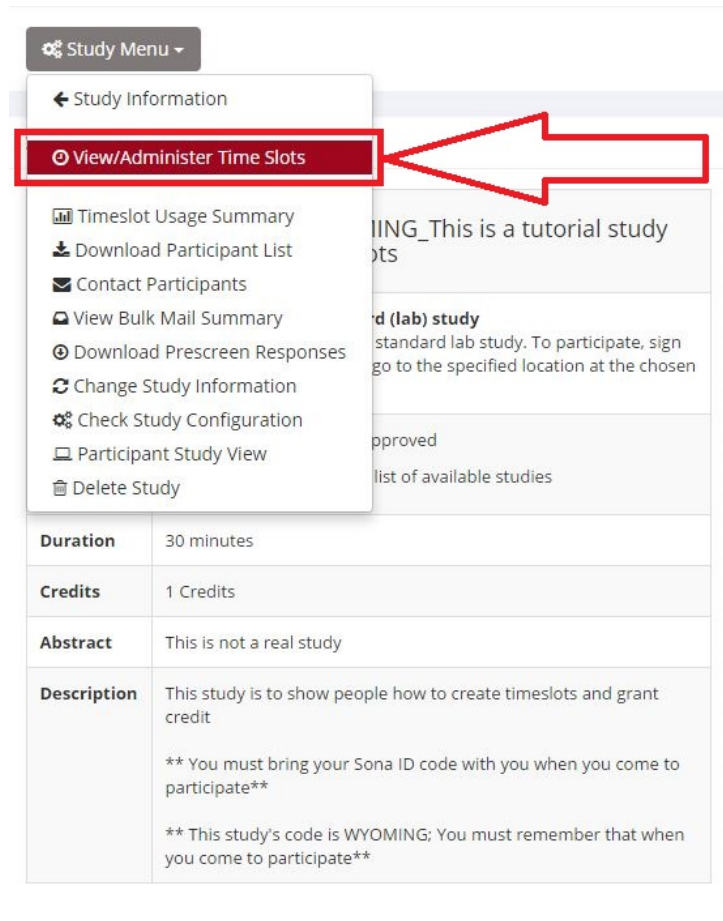
  

Researcher Information	
Researcher	Zared Shawver 
Principal Investigator	Zared Shawver 



## 6. Adding Timeslots

There are two main buttons to get you to the timeslot adding menu.

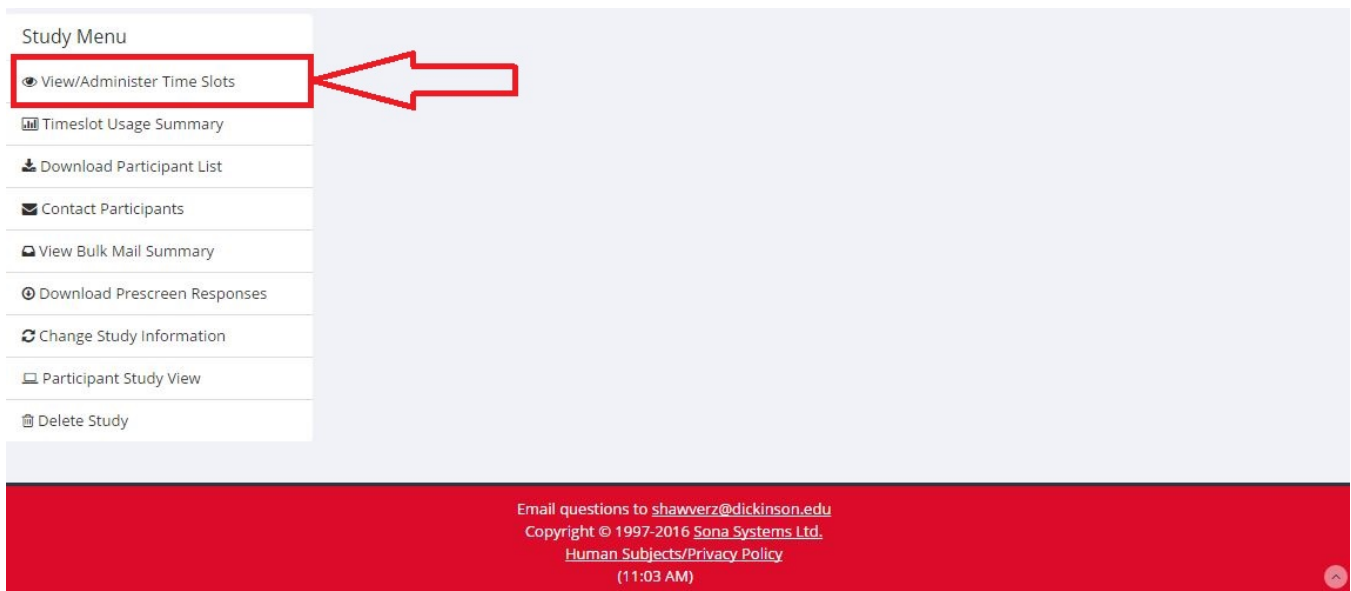


The screenshot shows a 'Study Menu' dropdown menu. The menu items are:

- ← Study Information
- View/Administer Time Slots** (highlighted with a red box and arrow)
- Timeslot Usage Summary
- Download Participant List
- Contact Participants
- View Bulk Mail Summary
- Download Prescreen Responses
- Change Study Information
- Check Study Configuration
- Participant Study View
- Delete Study

Below the menu, a table displays study details:

<b>Duration</b>	30 minutes
<b>Credits</b>	1 Credits
<b>Abstract</b>	This is not a real study
<b>Description</b>	This study is to show people how to create timeslots and grant credit  ** You must bring your Sona ID code with you when you come to participate**  ** This study's code is WYOMING; You must remember that when you come to participate**



The screenshot shows a 'Study Menu' dropdown menu. The menu items are:

- View/Administer Time Slots** (highlighted with a red box and arrow)
- Timeslot Usage Summary
- Download Participant List
- Contact Participants
- View Bulk Mail Summary
- Download Prescreen Responses
- Change Study Information
- Participant Study View
- Delete Study

At the bottom of the page, there is a red footer with the following text:

Email questions to [shawverz@dickinson.edu](mailto:shawverz@dickinson.edu)  
Copyright © 1997-2016 Sona Systems Ltd.  
[Human Subjects/Privacy Policy](#)  
(11:03 AM)

Clicking either of those buttons will take you to this page where you will click the '+ Add A Timeslot' button. Other buttons are highlighted to show you that there are multiple sources for you to view and manage your older and upcoming timeslots.

Study Menu ➔ + Add A Timeslot + Add Multiple Timeslots Delete Multiple Timeslots View Printer-Friendly List of Signups Print

**All Timeslots** Recent Timeslots **Upcoming Timeslots** Older Timeslots

Timeslots : Study Code: WYOMING\_This is a tutorial study for creating timeslots

Timeslots for this study are listed below, with any sign-ups listed below the timeslot.

Search for available timeslots on :

There are no recent timeslots for this study.

This is what the 'Add Timeslots' page will look like before you add your first timeslot. Notice that it keeps track of your 'Timeslot Usage' in the top right. Enter the required information, but **make sure that you only enter the location that has been confirmed by the Academic Technician before your study was approved.**

Add Timeslots : Study Code: WYOMING\_This is a tutorial study for creating timeslots

Use this page to add a single timeslot for your study. You may also add multiple timeslots at once.

Date:  ➔

Start Time:  ➔

End Time: 30 minutes after start time

Number of Participants:  ➔

Location:

➔

Timeslot Usage

Already Used Hours	0
Scheduled Hours	0
<b>Total Hours</b>	0 (0 timeslots)
Usage Limit (Hours)	50
<b>Available Time (Hours)</b>	50

After you have added your first timeslot your 'Timeslot Usage' will have adjusted accordingly.

Timeslot Usage

Already Used Hours	0
Scheduled Hours	0.5
<b>Total Hours</b>	0.5 (1 timeslots)
Usage Limit (Hours)	50
<b>Available Time (Hours)</b>	49.5

However, if you reach the upper limit of your credit allocation, you may only create as many timeslots as you have been granted. Sona will not allow you to add more than the limit.

Already Used Hours	0
Scheduled Hours	49.5
<b>Total Hours</b>	49.5 (99 timeslots)
Usage Limit (Hours)	50
<b>Available Time (Hours)</b>	0.5

**System Message:** Timeslot add failed. Adding a timeslot with the number of participants specified would exceed the timeslot usage limits.



Once you have timeslots added, you can view and manage the timeslots in the 'All Timeslots' and simply collect participants until you have reached your limit.