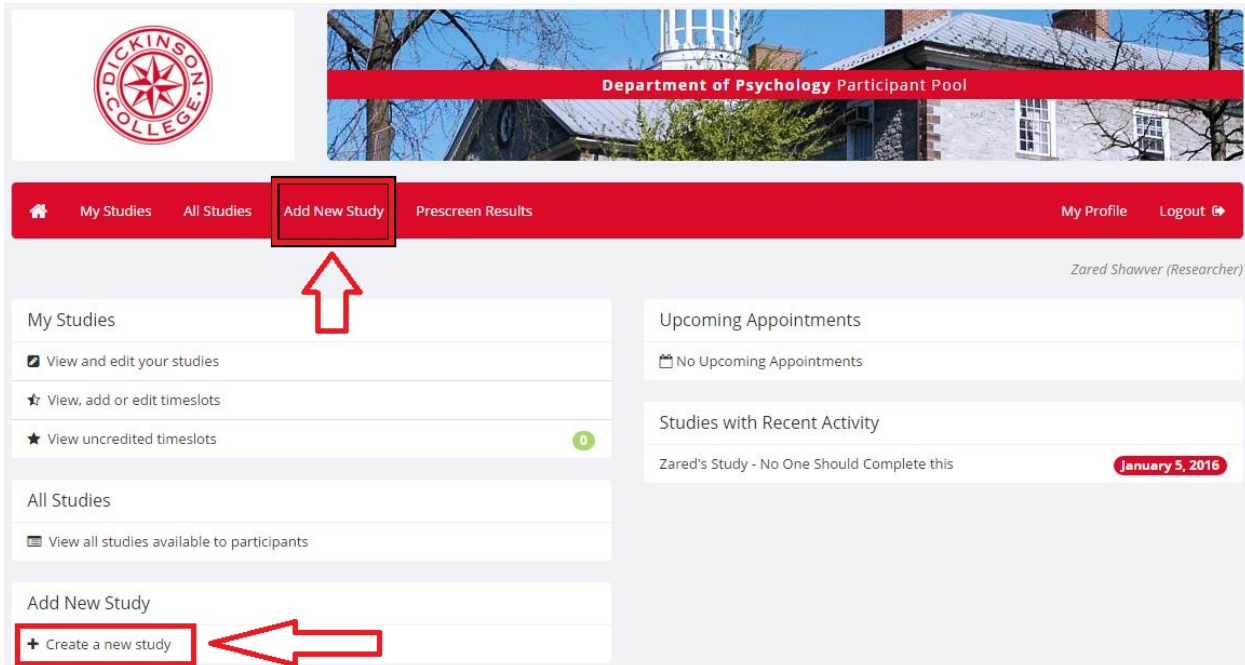


Creating and Managing an Online Study

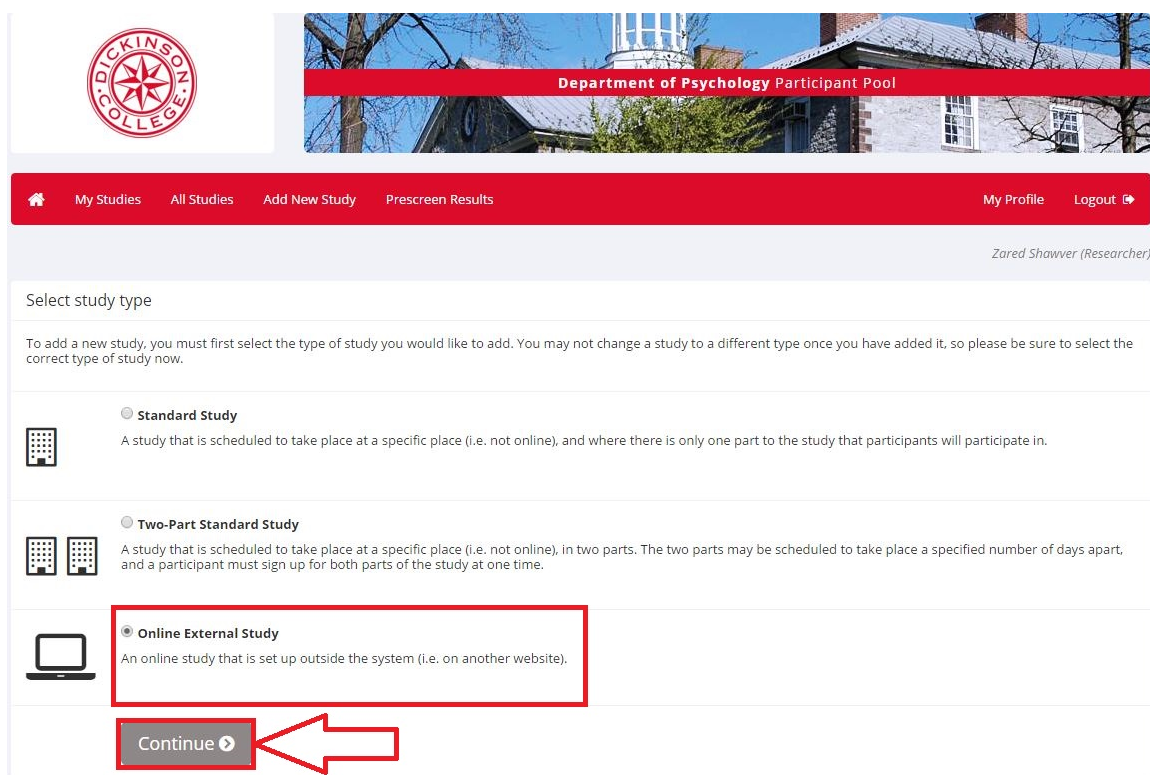
This is a dedicated tutorial for creating an online external study (i.e., one where students complete the study in a Qualtrics survey remotely) on Sona. It illustrates every step from adding a new study through creating timeslots and granting credit or no-shows. Follow this tutorial exactly to avoid 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 screenshot shows the Sona home screen for a researcher. At the top left is the Dickinson College logo. To its right is a banner for the "Department of Psychology Participant Pool" with a background image of a building. Below the banner is a navigation bar with a home icon, "My Studies", "All Studies", "Add New Study", "Prescreen Results", "My Profile", and "Logout". The "Add New Study" button is highlighted with a red box and a red arrow pointing up to it. Below the navigation bar, the user's name "Zared Shawver (Researcher)" is displayed. The main content area is divided into three sections: "My Studies" with options to view and edit studies, view/add/edit timeslots, and view uncredited timeslots; "All Studies" with an option to view all studies available to participants; and "Add New Study" with a button labeled "+ Create a new study" which is highlighted with a red box and a red arrow pointing left to it.



The screenshot shows the "Select study type" page. At the top left is the Dickinson College logo. To its right is a banner for the "Department of Psychology Participant Pool" with a background image of a building. Below the banner is a navigation bar with a home icon, "My Studies", "All Studies", "Add New Study", "Prescreen Results", "My Profile", and "Logout". The user's name "Zared Shawver (Researcher)" is displayed. The main content area is titled "Select study type" and contains the following text: "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." There are three radio button options: "Standard Study" (with a building icon), "Two-Part Standard Study" (with two building icons), and "Online External Study" (with a laptop icon). The "Online External Study" option is selected and highlighted with a red box. Below the options is a "Continue" button with a right-pointing arrow, which is also highlighted with a red box and a red arrow pointing left to it.

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"/>	Give a name that is descriptive, but not too revealing or long
Brief Abstract	<input type="text"/>	In about a sentence, what is your study about? Don't be too revealing.
Detailed Description	<input type="text"/>	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."
Eligibility Requirements	<input type="text" value="None"/>	From Prescreen
Duration	<input type="text" value="30"/> Minutes	In increments of 30
Credits (Credits must be evenly divisible by 1)	<input type="text" value="1"/>	1 credit = 30 min
Timeslot Usage Limit	<input type="text" value="75"/> Hours	75 (only the administrator may change this value)
Preparation (Up to 255 characters, optional)	<input type="text"/>	This is very study specific, you likely will not have to use this

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 style="border: 1px solid red; padding: 5px;"><ul style="list-style-type: none">Ammerman, AaronBaumgardner, MeganFoong, JulieGowing, StephanieGuo, CaiHoppers, LeanneJansen, JessieKaufman, HannahKruchten, RachelMarshall, Traci</div>	<input type="text" value="Shawver, Zared"/>
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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

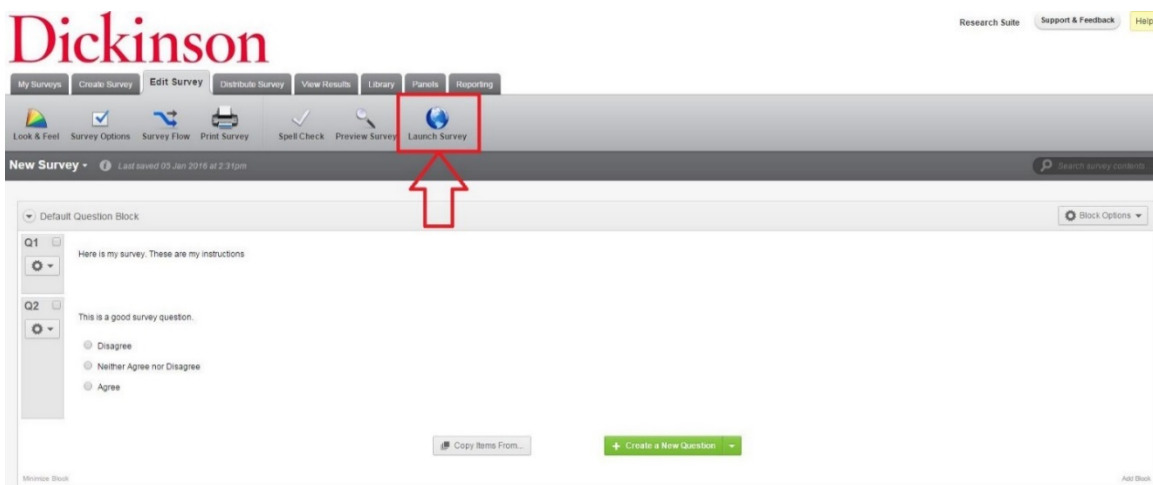
Selected

4. Add Qualtrics Link

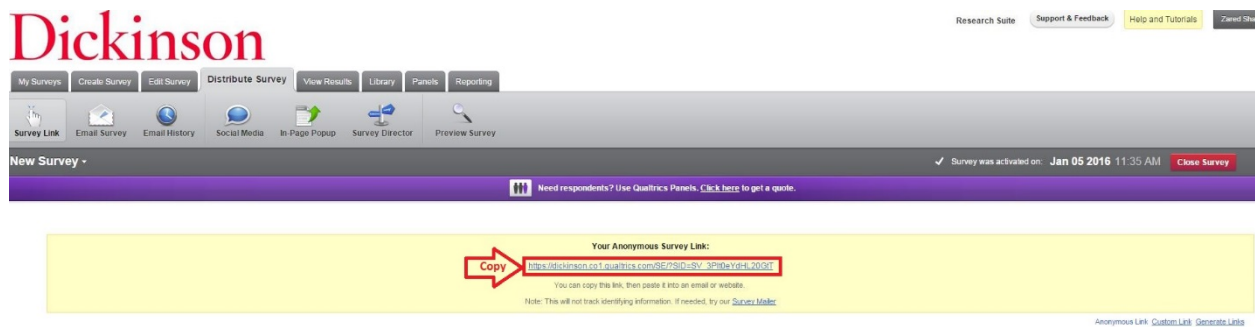
Because your study is will be completed on Qualtrics you will have to add the link that students will click to access your study. In Sona, you will paste the link in the box here:

Study URL	<p>Paste from Qualtrics →</p> <div style="border: 1px solid black; height: 20px; width: 100%;"></div> <p>If the text %SURVEY_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study. You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add &id=%SURVEY_CODE% to the end of the URL to make use of this feature.</p> <p>Detailed Help</p>
Study URL Display	<p>After participants complete this study, can they still access the Study URL? They will not be given the URL until they have signed up for the study. This setting controls if they can still see it after they have participated.</p> <p><input type="radio"/> Yes</p> <p><input checked="" type="radio"/> No</p>

To get the link from Qualtrics, log in to your Qualtrics Account, access your survey, and click on the 'Launch Survey' button.



On the launch survey page, copy the 'Anonymous Survey Link' in the middle of the page.



Back in Sona, paste the link in the box next to 'Study URL'

Is this a web-based study?	<p><u>Yes -- study is administered outside the system</u></p>
Study URL	<p>→ <div style="border: 1px solid black; padding: 2px;">https://dickinson.co1.qualtrics.com/SE/?SID=SV_3Pit0eYdHL20GtT</div></p> <p>If the text %SURVEY_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study.</p>

5. Finalizing your Study

There is no formal policy on study Deadlines. You can adjust the 'Sign-Up' and 'Cancellation' deadlines to be anything that you want. For Online Studies, it is recommended that you significantly reduce the 'Sign-Up Deadline' so that participants can have as much time as possible to sign up for and complete your study. However, you should not make the deadline less than the length of your study. Adjusting the 'Cancellation Deadline' does not have that much of an impact on Online Studies.

Participant Sign-Up Deadline hours before study is to occur

Participant Cancellation Deadline 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.

The 'Researchers at Timeslot-Level' should be 'No' because of the uniqueness of timeslots for Online Studies.

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?
 No
 Yes -- for sign-ups and cancellations
 Yes -- for cancellations only

Personal Preference

Researchers at Timeslot-Level
Can researchers for this study be assigned to specific timeslots? Only applies if the study has more than one researcher.
 Yes
 No

Can a participant sign up for this study more than once? (at different times)
 Yes
 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)

Most people don't use this.

Visible to all researchers and PIs in the system, but not visible to participants

Private Comments
(Up to 3,000 characters, optional)

Most people don't use this.


Visible only to researchers and PIs for this study, but not visible to participants or other researchers/Pis in the system

Research Alternative No

Add This Study



6. Completed Study

This is what your completed study will look like before you have received approval. Notice that the 'Direct Study Link' is crossed out. This is because you should not be emailing anyone the Sona link to complete your study. Verify that 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'). Before emailing the Academic Technician you need to set up your study for automatic crediting.

Study Information	
Study Name	This is a tutorial study for automatic crediting
Study Type	 Web Study This is an online study. Participants are not given the study URL until after they sign up.
Study Status	Visible to participants: Approved Active study: Appears on list of available studies Online (web) study: Administered outside the system
Duration	30 minutes
Credits	1 Credits
Website	View Study Website Sample Link with Embedded ID Code Qualtrics Redirect to a URL <input type="text" value="https://dickinson.sona-systems.com/webstudy_credit.aspx"/> Completion URL: <input type="text" value="https://dickinson.sona-systems.com/webstudy_credit.aspx"/> (client-side) Instructions <p>You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add <code>&id=%SURVEY_CODE%</code> to the end of the URL to make use of this feature.</p> Detailed Help
Abstract	This is not a real study
Description	Automatic crediting grants credit to participants immediately after they have completed a study.

Restrictions	
Prescreen Restrictions	No Restrictions View/Modify Restrictions

Additional Study Information	
Timeslot Usage Limit	75 hours (approximately 150 signups)
Participant Sign-Up Deadline	1 hours before the study is to occur
Participant Cancellation Deadline	24 hours before the study is to occur
IRB Approval Code	
Direct Study Link	<input type="text" value="https://dickinson.sona-systems.com/default.aspx?p_"/> This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	January 5, 2016

Researcher Information	
Researcher	Zared Shawver 
Principal Investigator	Zared Shawver 

7. Automatic Crediting

First, at the end of the 'Study URL' that you pasted from Qualtrics type (without quotes) "?id=%SURVEY_CODE%"

Study URL

https://dickinson.co1.qualtrics.com/jfe/form/SV_4VBJ4LDDgvU05i5?id=%SURVEY_CODE%

If the text %SURVEY_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study. You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add ?id=%SURVEY_CODE% to the end of the URL to make use of this feature.

[Detailed Help](#)

After your study has been created, go back into Qualtrics. Click on the 'Edit Survey' tab and choose the 'Survey Flow' option.'

Dickinson

My Surveys Create Survey **Edit Survey** Distribute Survey View Results Library Panels Reporting

Survey Link Email Survey **Email History** Social Media In-Page Popup Survey Director Preview Survey

New Survey -

[Need respondents? Use Qualtrics Panels. Click here to get a quote.](#)

Your Anonymous Survey Link:

https://dickinson.co1.qualtrics.com/SE/?SID=SV_3PiDeYqHL2DGT

You can copy this link, then paste it into an email or website.

Note: This will not track identifying information. If needed, try our [Survey Mailer](#)

My Surveys Create Survey **Edit Survey** Distribute Survey View Results Library Panels Reporting

Look & Feel **Survey Options** **Survey Flow** Print Survey Spell Check Preview Survey Launch Survey

Your study might look different depending on how many blocks it has and/or any special study orders. Go to the very last block at the bottom of your survey flow. Add a new element by either clicking '+ Add a New Element Here' or 'Add Below.'

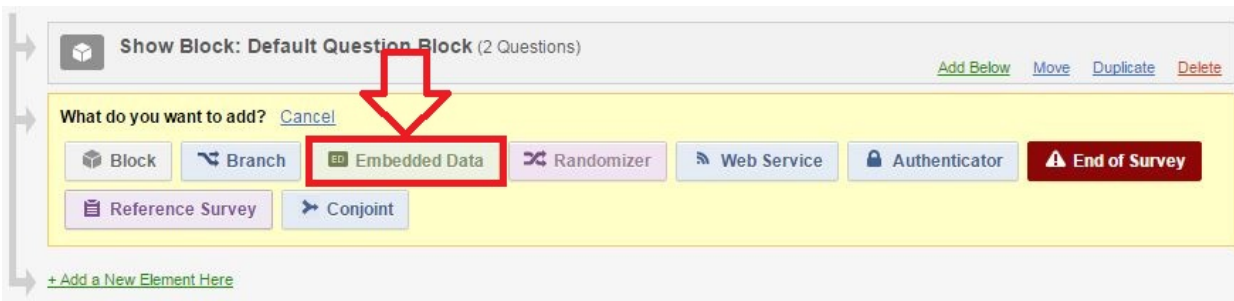
Survey Flow

Show Block: Default Question Block (2 Questions)

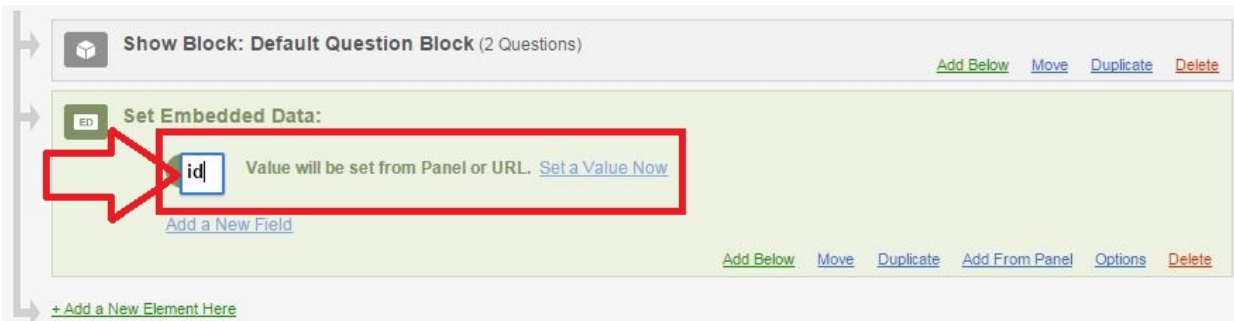
[+ Add a New Element Here](#) [Add Below](#) [More](#) [Duplicats](#) [Details](#)

[Cancel](#) [Save Flow](#)

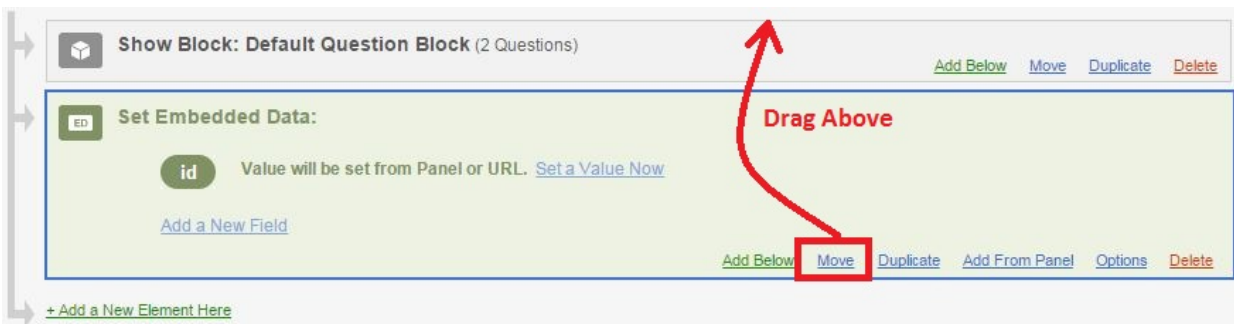
On the new block click the 'Embedded Data' button.



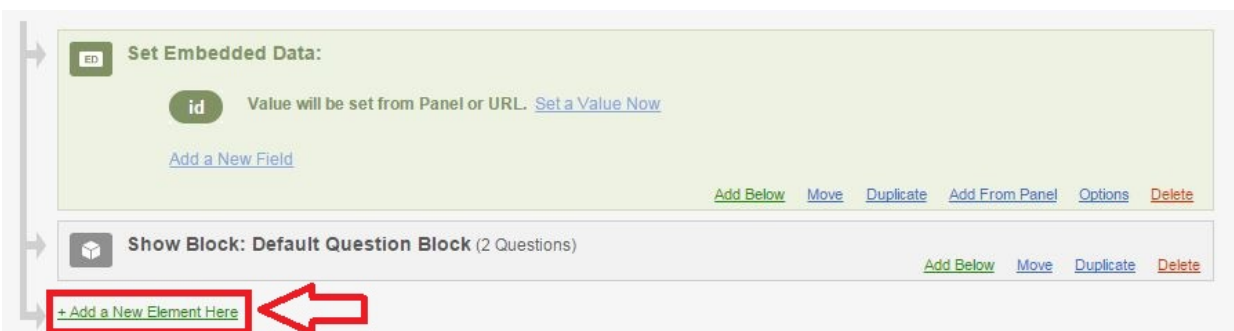
Type (without quotes) "id" into the textbox that appears.



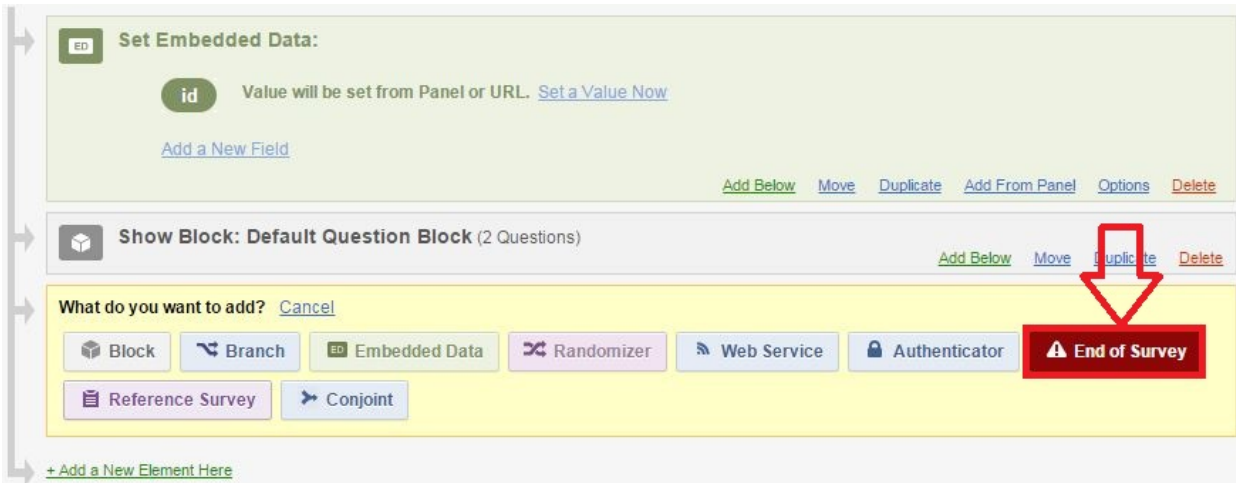
Click anywhere out of the textbox and drag the block to where it will be before any other blocks in your survey by using the 'Move' button.



Add another element at the very bottom of the survey by again clicking '+ Add a New Element Here.'



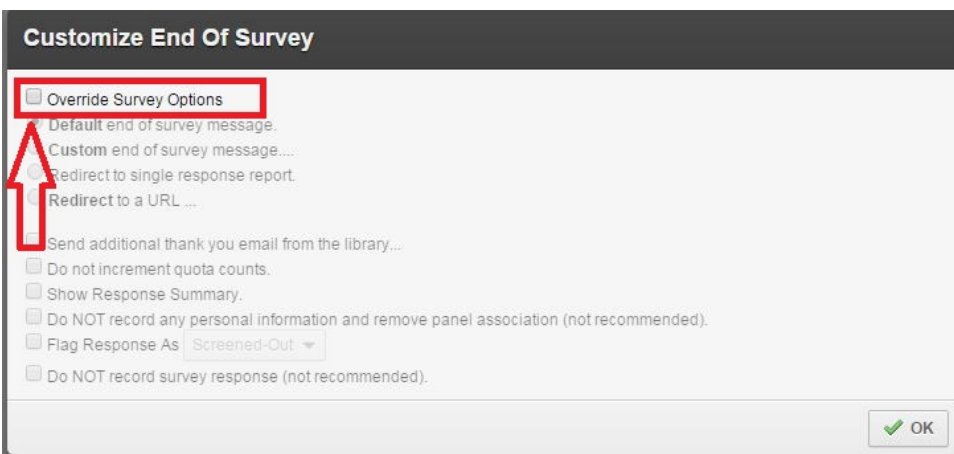
On the new block, click the 'End of Survey' button.



Click the 'Customize' option.



A dialog box will appear. In it click the 'Override Survey Options' button.




Of the 'Override Survey Options' click the 'Redirect to a URL...' option.



Go back to your study in Sona and select and copy the 'Completion URL:'.

Study Information

Study Name	This is a tutorial study for automatic crediting
Study Type	 Web Study This is an online study. Participants are not given the study URL until after they sign up.
Study Status	Not visible to participants: Not Approved Send Request Inactive study: Does not appear on list of available studies Online (web) study: Administered outside the system
Duration	30 minutes
Credits	1 Credits
Website	View Study Website Sample Link with Embedded ID Code Qualtrics Redirect to a URL <input type="text" value="https://dickinson.sona-systems.com/webstudy_credit.aspx"/> Completion URL: <input type="text" value="https://dickinson.sona-systems.com/webstudy_credit.aspx"/> (client-side) Instructions <p>You can also configure it so that participants receive credit in the system immediately after finishing the survey. If you are using Qualtrics, add &id=%SURVEY_CODE% to the end of the URL to make use of this feature.</p> Detailed Help




Paste the 'Completion URL:' in the box next to 'Redirect to a URL...':

Redirect to a URL

I couldn't get a screen shot of it, but at the end of the completion URL that you just pasted into Qualtrics (seen immediately above) delete (without quotes) "XXXX" and type (without quotes) "\${e://Field/id}". Click 'OK'.

Customize End Of Survey

- Override Survey Options
 - Default** end of survey message.
 - Custom** end of survey message....
 - Redirect to single response report.
 - Redirect to a URL ...**
- Send additional thank you email from the library...
- Do not increment quota counts.
- Show Response Summary.
- Do NOT record any personal information and remove panel association (not recommended).
- Flag Response As
- Do NOT record survey response (not recommended).



You're all done!