



Sona Systems, Ltd.
Experiment Management System

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Master Documentation Set
20 April 2015

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PARTICIPANT (STUDENT) DOCUMENTATION

Introduction

The Experiment Management System provides an easy method for you to sign up for studies, and track your progress throughout the term. Everything is done through the software's web-based interface, so you can access the system at any time, from any computer, with a standard web browser.

It should be noted that this documentation covers all the features in the system, but your organization may have chosen to disable certain features. Do not be alarmed if the documentation covers options and features that are not visible on the system you are using.

Getting Started

Your interaction with the system will be minimal and hopefully as painless as possible. After you log in to the system, you can view a list of available studies and any restrictions, sign up for studies that interest you, and track your progress throughout the semester. The system will track when you receive credits for a study, so you can view this online as well.

The system works best if you use any popular web browser that is less than 2 years old, like Internet Explorer, Firefox, Safari, and Chrome. It will work with other web browsers, and with older versions of popular web browsers, however the layout may not be as clean. No functionality will be lost by using an older web browser. The software will work if you are using a screen reader or other assistive tools for those with disabilities.

This documentation assumes you have a basic knowledge of how to use the web. On this system, it is not necessary to use the Back button. You can always use the toolbar on the top of every screen to navigate anywhere on the site.

Requesting an Account

If you see a link on the front page of the site to request an account, then your organization has enabled the feature to allow you to request an account. Click the link, and you will be required to provide some very basic information. Depending on how your system is configured, you may receive an email notification immediately with your login information, or you may receive the notification only after the administrator has approved your account request. The email notification will include login instructions for the system. You will be assigned a default password, which you may be allowed to change after your first login. In many cases, you may also provide an alternate email address (after your first login) if you prefer to receive future notifications at another email address. The email will come from the administrator's email address (typically listed on the request account page), so be sure to configure your junk mail filters to allow email from that address.

ACCOUNT INFORMATION

First Name

Last Name

User ID

User ID (re-enter for verification)

Student ID Number

Telephone

Course(s)

Hebrew Class	➡	
Potter Course Spring 14		
Psych 100		
Sociology 2300		
Summer 2014		

Available CoursesSelected Courses

Request Account

Figure 1 - Requesting an Account

If your organization has not enabled this feature, then your organization will create an account on your behalf. You will receive this account information, most likely by email.

If you did not receive your login information, please check your email program’s junk mail folder before contacting the administrator. The most common reason for not receiving login information is that an email program misclassified the email as junk mail.

Logging In

Once you have your login information, go to the front page of the site and enter your user ID and password to log in.

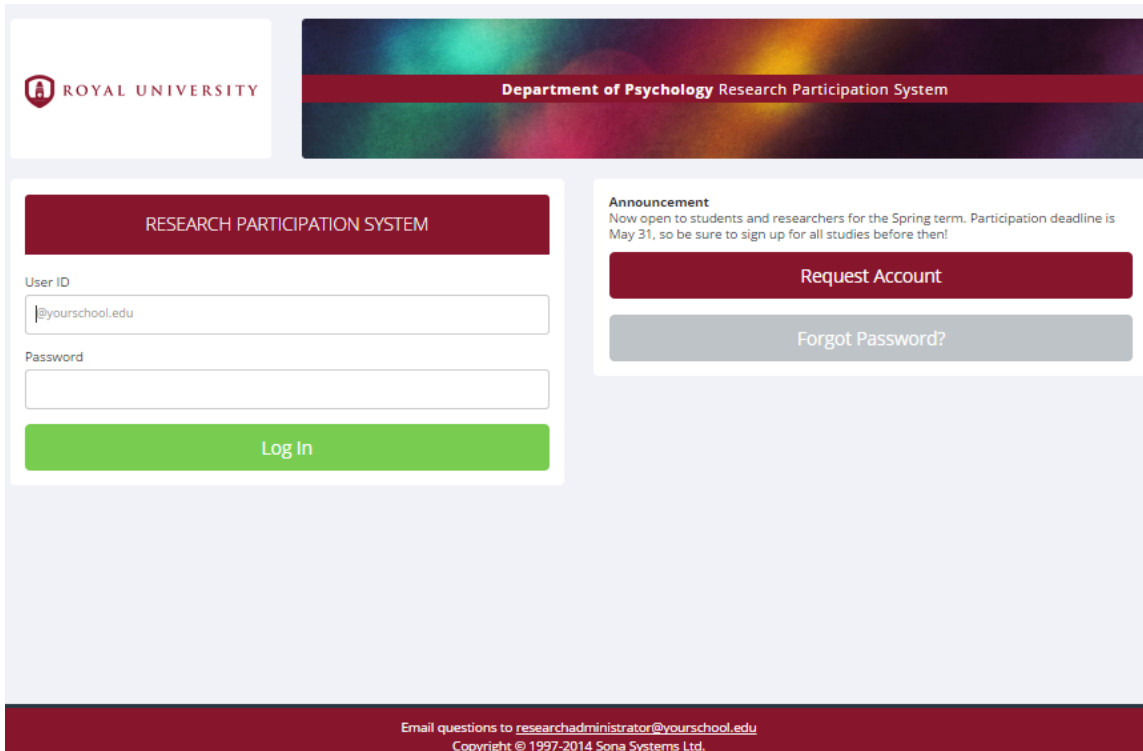


Figure 2 - Login Page

Once you log in, you may be asked to review and acknowledge your organization’s human subject and privacy policy for research. You will need to acknowledge this only once every 6 months. You may also be asked to participate in a prescreening. After you complete these tasks, you will see the Main Menu.

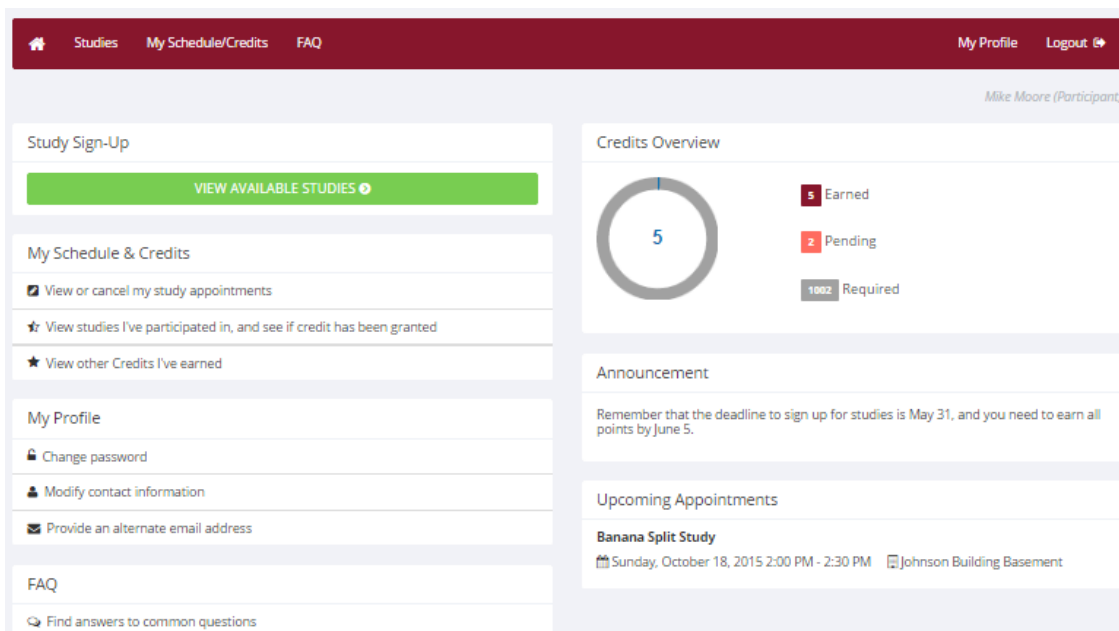


Figure 3 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, usually 20 minutes, and the system will warn you a few minutes before the expiration. This is done for security purposes. If this happens, you can always log in again. When you are done using the system, it is better to explicitly log out, to prevent any problems that may arise if someone uses your computer before the session expires. This is especially important if you are using a public computer lab.

Retrieving a Lost Password

If you have forgotten or do not have your password, and the feature is enabled on the system, then you may choose to reset your password. You will see an option on the front login page if this feature is enabled. By choosing this option, a link to reset your password will be emailed to you shortly after you make the request. This link is valid for 24 hours, and if you click on it, a new password will be generated and emailed to you. 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, which is derived from your user ID. If you requested a password reset and no email from the system has arrived after 30 minutes, then check in your email program's junk mail folder in case the email was delivered there. Typically, the email is sent within a few seconds of the request, but sometimes there can be a delay on behalf of some recipient email servers.

Logging Out

When you are done using the system, choose Logout from the top toolbar on the right side to log out. You are now logged out. It is always a good security measure to close all your browser windows as well, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password (and the option is enabled), type your new password (twice, for confirmation) in the provided boxes. If you would *not* like to change your password, simply leave these boxes empty.

If you change your password, please be sure to select a password you do not use on any other systems or websites, which is a good computing practice.

My Profile	
You may use this page to change your password and update other information about yourself. All fields are required unless marked otherwise.	
Name	Mike Moore
User ID	mmoore@yourschool.edu
Alternate Email Address	<input type="text"/>
Optional. If provided, all emails sent to you from the system will be sent to this address.	<input type="text"/>
	(please enter twice for verification purposes)
Change Password	Enter your current password, then your new password twice, to change your password. Otherwise, leave blank.
	<input type="text"/>
	Current Password
	<input type="text"/>
	New Password
	<input type="text"/>
	New Password (confirm)
Student ID Number	<input type="text"/>
Phone Number	<input type="text" value="708 134 8864"/>
<input type="button" value="Update"/>	

Credits	
Credits Earned:	5
Credits Required:	1002
Course(s)	Astrology 101 Sociology 2300
	<input type="button" value="Change Courses"/>
Prescreen Status	Completed

Figure 4 - Updating Your Profile

Email Address Options

There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that you have received credit for a study, or a confirmation that you have signed up for a study. If Unique ID codes are *not* enabled (see Unique ID codes), your email address is also displayed to the researcher when they view who has signed up for their study, in the event they need to contact you.

You may have two choices for your email address. When you update your profile, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Hotmail account, for instance), this is the address where any notifications will be sent, and this is also the address that will be displayed to researchers (if enabled).

If you do not supply an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain (if there is one) to the end of your user ID to form the address, so if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then it would derive your email address as "jsmith@yourschool.edu".

In situations where the system is configured so you may enter an email address on this page, you will be asked to enter it twice when changing the address, to ensure it is typed correctly.

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as “Email Address” instead of “Alternate Email Address”) and all emails to you will go to that address.

On some systems, the Alternate Email Address option is not available. In other cases, it is listed but you are not allowed to change it, in which case you should contact the administrator if you need this changed.

Changing Courses

Depending on how the system is configured, you may see an option to change which courses you are in. If this is an option, then you will see a “Change Courses” option just below the list of courses you are in.

You may have the option to remove yourself from existing courses and add yourself to new courses, or you may only have the option to add yourself to new courses. If you remove yourself from a course, and you had credits assigned to that course, the credits will *not* be reassigned to another course. You will receive a warning about this and be taken to a page where you can reassign those credits. You can go to My Schedule/Credits at any time to assign unassigned credits to a course.

Unique ID Codes

If enabled, the system will automatically assign a unique, numeric ID code to you. You should continue to use your normal login ID to log in to the system. The purpose of the ID code is to identify you to researchers in a way that does not reveal your identity or compromise your privacy. If this feature is enabled, you will see this ID code when you go to view your profile, and in email confirmations and reminders about your upcoming study sessions. You should bring this ID code with you when you go to studies or when communicating with researchers, as they know you only by your ID code, and not your name.

Studies

With the system, you may view studies and sign up for those that interest you and where you meet any special eligibility restrictions. You may cancel your sign-up through the system as well.

You may see some studies that are online studies. You should read the details of these studies closely, but generally you may participate in them online without having to go to a lab. It is usually assumed you will participate in the study shortly after you sign up for it, though you have until the Participation Deadline Date to participate.

Viewing Studies

To view a list of studies, click on Studies from top toolbar. You will see a list of studies. A brief description of each study will be listed, as well as any special requirements that may restrict your eligibility to participate in the study.

Currently Viewing: **All Studies**

View studies with available timeslots on :

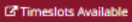
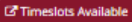
Available?	Study Information	Eligibility
	External Survey Monkey (4 Credits) (Online Study)	
	Managing Costs When Abroad (1 Credits)	Invitation code required.
	Memorable Events in Life (1 Credits) This study focuses on events that have affected your life since.	
	Mobile vs Landline Study (1 Credits)	Invitation code required. Must be 18 or older. Prior study restrictions
	Pronunciation of Words (1 Credits) Study of word pronunciation	Invitation code required.
	Climate effects on happiness (1 Credits) brief description of the study	eligible if you like As Prior study restrictions
	Math Problems (0.5 Credits) (Online Study)	
	External Study Limesurvey (1 Credits) (Online Study)	
	Historical Events (1 Credits) (Online Study)	Invitation code required.
	Banana Split Study (1 Credits)	

Figure 5 - Viewing Studies

Studies that currently have available participation times (timeslots) will have “TIMESLOTS AVAILABLE” listed next to the name of the study. If no studies have available timeslots, you may want to log on to the system a few days later to see if new timeslots have been added. You may also select a specific date to view studies with available timeslots on that date.

To view more information about a study, click on the name of the study.

Two-Part Studies

Some studies are two-part studies, where you must sign up for both parts of the study at once, and the two parts must be scheduled a certain number of days apart. These studies will be clearly marked, and the system will ensure you are only able to sign up for timeslots with the appropriate amount of time between the first and second part.

Online Survey Studies

Some studies may be online survey studies that are administered in the system. If you sign up for one of these studies, you will be taken immediately to the survey. As soon as you complete the survey, you will receive credit.

You may withdraw from the survey at any time, by clicking the Withdraw button on the top right corner of the screen. When you withdraw, you have an option to withdraw without the chance to receive credit, or with the chance to receive credit. The difference is that if you withdraw without the chance to receive credit, then your sign-up will be completely deleted from the system. This is useful if you simply changed your mind about participating in the survey, but might like to participate in it again at a later time.

If you choose to withdraw with the option to receive credit, then your sign-up will be logged and the researcher will be notified of the withdrawal, but you will not be granted credit immediately. The researcher may then choose to grant credit to you for your participation in the study. If this is done, you will not have the opportunity to participate in this study again (because you may not participate or receive credit for the same online survey study more than once). With this withdrawal option, you are not obligated to provide any explanation of why you are choosing to withdraw, but you may provide an explanation if you like, and this information will be sent to the researcher when they are notified of your withdrawal.

With either withdrawal option, all the survey responses you provided are permanently deleted at the time you withdraw.

Signing Up For Studies

To sign up to participate in a study, find the study you would like to participate in (see Viewing Studies in this documentation). Click on the study name for more information. You will see a list of any special restrictions or eligibility requirements, as well as a contact person if you have questions about the study. If the study has a principal investigator listed, you can click their name to view full contact details. In most cases, it is preferred that you contact the person listed as the researcher if you have specific questions.

Some restrictions are automatically enforced by the system. If the study has certain pre-requisites or disqualifiers (studies you must *not* have participated in to participate in this study), those may be listed, as well as a note about whether you meet those eligibility requirements. If you have signed up for a study with another study listed as a disqualifier study, then you will be prevented from signing up for the other study, since it is a disqualifier for a study you are currently signed up for.

Study Information


Study Name	Banana Split Study
Study Type	 Standard (lab) study This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Credits	1 Credits
Duration	30 minutes
Description	Studying the ice creams.
Preparation	Get ready.
Website	View Study Website
Researcher	Hugo Finkelstein
Principal Investigator	Billy Falcon
Deadlines	Sign-Up: 24 hour(s) before the appointment Cancellation: 24 hour(s) before the appointment
	View Time Slots for This Study

Figure 6 - Study Information

The study may have other restrictions listed as Eligibility Requirements. An example of an eligibility requirement is “Left-handed people only.” If listed, then the system does *not* enforce this restriction, but you should only sign up for the study if you meet this restriction. If you sign up for the study and you do not meet the restrictions, you will likely not receive credit for the study, and could face a penalty.

If the study is not an online study, then the sign-up and cancellation deadlines for the study will be listed, and those are based on the date of each timeslot.

If you are viewing a study which you have signed up for in the past and already participated, and are not allowed to sign up for it again, then you will not see the list of timeslots for the study.

Some studies require a special password (known as an Invitation Code) to sign up. If this is the case, it will be noted. The researcher should have given you this invitation code. It is *not* the same as the password you use to log in to the system. You will need to enter the invitation code just before you click the Sign Up button to sign up for a timeslot.

You may only sign up for a timeslot up until a certain time before that timeslot is scheduled to occur. The system will not show a Sign Up button for timeslots where it is too late to sign up. If you sign up for

a timeslot and you already have another signup in the system that conflicts with that appointment time, the system will warn you of the scheduling conflict (though it will not prevent the sign-up).

Timeslots for Study

Date	Location	Sign Up?
Wednesday, September 23, 2015 3:00 PM - 3:30 PM	Greeves Hall 399	Sign Up
Sunday, October 18, 2015 2:00 PM - 2:30 PM	Johnson Building Basement	Sign Up
Thursday, November 5, 2015 2:30 PM - 3:00 PM	Student Lounge	Sign Up
Monday, November 16, 2015 3:00 PM - 3:30 PM	Johnson Building Basement	Sign Up

Figure 7 - Study Timeslots

Once you have determined you meet all the requirements, click on View Timeslots for This Study and you will see a list of available timeslots. Choose a timeslot that is convenient for you, and click Sign Up.

After you click Sign Up, you will see information displayed confirming the time and location of the study you plan to participate in. You may receive an email confirmation as well, depending on how your system is configured. You are now signed up for the study. To cancel your sign-up, see Canceling a Sign-Up in this documentation.

Canceling a Sign-Up

If you need to cancel a timeslot you have signed up for, you can do this from the My Schedule and Credits page. Choose the My Schedule/Credits option from top toolbar.

You will see listed all the studies you have signed up for, as well as those you have completed (see the Tracking Your Progress section of this documentation for more information).

Studies you have signed up for that you are allowed to cancel will have a Cancel button next to them. There is a time limit before the study is to occur, when it is too late to cancel. This restriction may be listed at the bottom of the page, or can be found by clicking on the study name and viewing the study details, depending on how cancellation deadlines are configured in your system.

System Message: Are you sure you want to cancel this sign-up?

Cancel Study Signup

IMPORTANT: You may cancel a study sign-up up to 24 hours before the study is scheduled to occur. If you decide to cancel, you will receive an email confirmation of the cancellation, for your records.

Study Name	Banana Split Study
Date	October 18, 2015 2:00 PM - 2:30 PM
Location	Johnson Building Basement
Preparation	Get ready.
Researcher	Hugo Finkelstein Email: joseph@joseph-orr.com
Principal Investigator	Billy Falcon

Would you like to cancel this sign-up?

Yes, I want to cancel No, I do not want to cancel

Figure 8 - Sign-Up Cancellation

Once you click Cancel to cancel your sign-up, you will see a confirmation page. You will also be warned if your cancellation might affect your ability to participate in other studies you have signed up for, due to pre-requisite restrictions. If the cancellation will affect your ability to participate in another study you are signed up for, it is *your* responsibility to deal with this issue (usually by canceling the dependent study as well). The system will warn you, but will not block the cancellation.

Click Yes to cancel your sign-up, and the sign-up will be cancelled immediately.

If you cancel the first part of a two-part study, the second part will also be cancelled. If you cancel the second part of a two-part study, the first part will *not* be cancelled, but you will need to ask the researcher to sign you up for the second part again, if you would like to participate in it at a later date.

Tracking Your Progress

You may track your progress at any time by choosing the My Schedule/Credits option from the top toolbar.

When you view this page, you will see at the top a list of the number of credits you are expected to earn, and how many you have earned so far. You may also have an option to view how many credits you have earned for each course. Below that, if you have signed up for any studies, those are listed as well. In the list of studies, you will see information about your credit status.

Overall Credits Earned: 5 Overall Credits Pending: 2 Overall Credits Requirements: 1602

Remember you have until May 20 to reassign your credits between courses.

Study Signups

Study	Time	Location	Credit Status	Course	Comments	Cancel?
Climate effects on happiness Credits: 1 Credits	June 4, 2014 11:00 AM - 11:30 AM	Greeves Hall 399	Failure to appear - unexcused (1 Credits penalty).	Astrology 101 Reassign		
External Survey Monkey Study Type: Online Study Credits: 4 Credits	October 30, 2014 9:00 AM	Online	4 Credits granted on September 9, 2014.	Astrology 101 Reassign		
The Psychic Canine Comparison	November 4, 2014 11:05 AM - 11:35 AM	Greeves Hall 399	Awaiting action from researcher	Astrology 101		

Figure 9 - Viewing Your Progress

If you failed to appear for a study, it is possible you were assessed a penalty. That will be displayed in your progress, and the penalty (if assessed) will either increase the number of credits you must earn, or be deducted from your current credit earnings, depending on how the system is configured. It is possible you might end up with a negative value for the number of credits you have earned. Next to each signup, you can also see any comments the researcher left regarding the study and your credit for it. In cases where the study was set up for monetary compensation and not credits, your participation will be noted as “participated.” This is done to ensure your eligibility for any studies where the study you just completed is a pre-requisite study.

Non-study credit is also listed, when applicable. Non-study credit is usually granted for writing a paper, completing the prescreen, or some other special situation.

It is possible that older records of your participation are in the system, but not displayed. If that is the case, you’ll see an option to view your older signups as well.

Reassigning Credits

If you belong to multiple courses, and the system is configured to allow it, you may reassign a credit from one course to another. To do this, simply use the Reassign link that appears when you view your progress. The link appears under the course entry for each item in your progress listing. You may not split a credit between two courses, for example by assigning 2 credits of a 3-credit study to one course, and 1 credit from that study to another course.

Online Prescreening

If enabled on your system, you may be asked to take an online prescreen before you use the system. Depending on how the prescreen is configured, you may have the option to opt out of the entire

prescreen and/or individual questions. You should realize that declining to participate in the prescreen or certain questions may affect your eligibility for some studies, so participation is encouraged.

In some cases, you may earn credit for participating in the prescreen, and you may even earn credit if you decline to participate in the prescreen. If either case holds true, the system will inform you of this before you commence the prescreen.

The prescreen may consist of multiple sections. All questions are either multiple-choice or fill-in (free-entry) answer. At the end of the prescreen, you may have a chance to review and change any of your responses. After you save all your responses, you may not participate in the prescreen again (unless the administrator has allowed this or deleted your existing responses), so answer the prescreen carefully.

Section Questions

Listed below are questions for this section of the prescreen. Please provide a response for every question. If you are given the option to decline to answer a question, then declining to answer is considered a response.

1. What is your average household income in a year?

- \$... - \$15,000
- \$15,000 - \$25,000
- \$25,000 - \$35,000
- \$35,000 - \$45,000
- \$45,000 - \$...

Check this box if you do not want to provide an answer for this question

2. Please describe your average day.

Check this box if you do not want to provide an answer for this question

Figure 10 - Prescreen Questions

Frequently Asked Questions

Immediately after I login, as soon as I click on any menu option, I am taken back to the login page and I see a message that my authentication has expired. What does this mean?

Your web browser is not properly configured to accept cookies. You should turn on cookies in your web browser, use a different web browser (for example, try Firefox if you are currently using Internet Explorer), or try a different computer. Detailed instructions can be found if you go to the site and enter the url "cookie_help.aspx" in place of "default.aspx" in the address bar of the browser, when you are on the front page of the site.

Another easy thing to try is simply to use another computer. Usually the computers in university computer labs are configured correctly.

I participated in a study, but I have yet to receive credit. How do I receive credit?

The researcher must grant you credit. This is usually done shortly after your participation. If it has been some time and you have still not received credit, contact the researcher.

Who can see the information about my sign-ups? I don't want everyone to know which studies I signed up for.

Only the researcher and principal investigator of the study may see that you have signed up for it, along with the site administrator. No other users, including other researchers or your instructor, may see this information.

How do I change the email address where email notifications from the system are sent?

Provide an Alternate Email address and notifications will be sent there. See the Email Address Options section of this documentation for more information. In some cases, this option may not be available.

I wrote a paper instead of participating in studies. How do I know I have completed my requirements?

View the My Schedule and Credits page and any non-study credit will also be listed there. See the Tracking Your Progress section of this documentation for more information.

I noticed that with some studies, I can sign up for them again even if I participated before, while others don't allow for this. Why is this?

Researchers can choose if their studies allow you to participate more than once. Not all studies allow you to participate more than once.

I attempted to sign up for a study, and I was prevented from doing so because the study I was trying to sign up for is a disqualifier for another study I am scheduled to participate in. Why is this?

If you have signed up for a study that has disqualifiers (studies you must *not* have participated in to participate in that study), you may not then sign up for the studies that are listed as the disqualifier studies. You *are* allowed to sign up for the disqualifier studies if the disqualifier study will take place after the study with disqualifiers, or if you have already participated in (and received credit for) the study with disqualifiers. The easiest way to sign up for both studies is to schedule the disqualifier study at a time later than the study with disqualifiers.