An Online Internal Study

Contents

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An Online Internal Study - Study Type

An Online Internal Study is a survey study where the questions are set up in Sona Systems. The survey is distributed online through Sona Systems. Participants select the study link and are directed to the survey. Credit is assigned automatically upon completion of the survey.

Creating the Study

*Log in to Your Sona Systems Account*

To get started, log in to your Sona Systems Researcher account at https://weberstate.sona-systems.com. (Your instructor will have requested researcher accounts for your class and login info should have been emailed to you. If you have not received an email and you know your instructor has requested accounts for your class, please contact the Lab Manager)

Once in, you'll see your homepage.

Adding a Study

<u>*Before*</u> you continue, **make sure you have the following information:**

- Your IRB approval number
- The expiration date for your IRB approval number
- Duration of study
- The amount of credits your project is worth for the duration of your study (1 credit per 15 mins. For more info, refer to the credits link on the Primary Investigators webpage.).
- Name of Instructor
- Names of all researchers
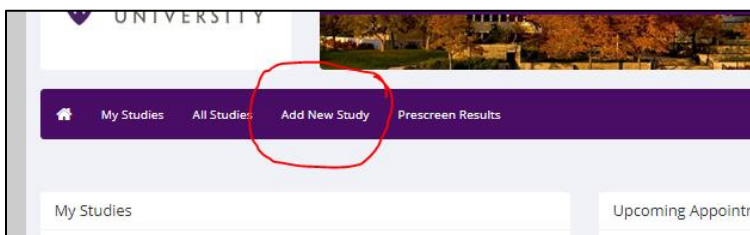
From the homepage, select the tab titled *Add New Study.* The next page will ask you to select study type. Under *Online Internal Survey Study*, select the credit option and then press continue.

You will now enter in some basic study information. You will need to fill out a number of fields, which are explained in the following table. Some of the fields listed below may not appear depending on how your system is configured, and the **type of study** you selected (Online Internal Survey Study). All fields in the Basic Study Information section must be filled out unless otherwise noted.
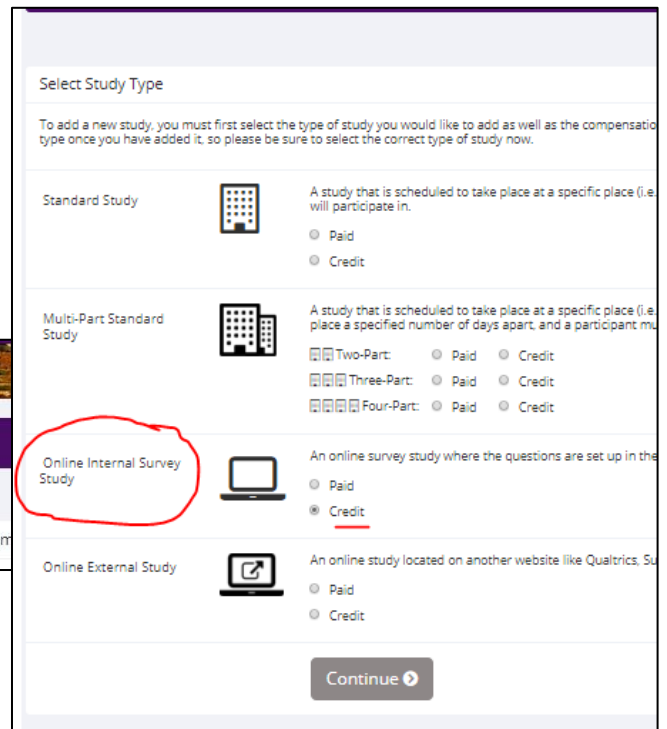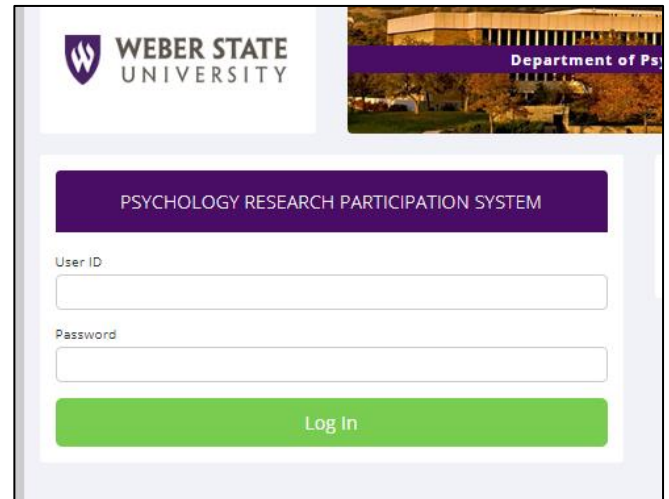
(Refer to table below.)

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.

All studies must have a IRB approval code and expiration date specified. No timeslots may be posted after the expiration date. Only the administrator may change the expiration date.

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

(Participants see the list of studies in random order not alphabetical order.)

Brief Abstract
(Up to 255 characters, optional)

Detailed Description
(Up to 15,000 characters, optional)

Eligibility Requirements | None

Duration | 30 | Minutes

Credits | 2
(Credits must be evenly divisible by 1)

Basic Study Information-Table 1

Field	Explanation
Study Name	A short name for the study. This is how the study is identified throughout the system. Most systems are configured so studies show in a random order to participants (choose Your Studies on the toolbar and it will state at the bottom of the resulting page if they are displayed in random order), so there is no advantage in choosing a study name that might put it at the top of an alphabetical list. You should consult with your administrator if there is a naming convention to be followed when naming studies. Study names must be unique, and you will be prevented from adding a study if there is already another study in the system with the same name. A study name may be up to 100 characters in length.
Brief Abstract (this feature might be disabled on your system)	This is a short one or two line description of the study. This short description will be displayed to participants when they view the entire list of studies, so it may be beneficial to list the most pertinent details here. This field may be optional, and can be up to 255 characters in length.
Detailed Description (this feature might be disabled on your system)	This can be a more long-form description about the study, and it will show if a participants clicks on the study to get more information before they sign up. You may include basic HTML in this area (ask your IT department for help if you are unsure of how to do this). If you would

	like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). This field may be optional, and can be up to 15,000 characters in length.
Eligibility Requirements	If there are any restrictions on who may or may not participate (for instance, only those who are left-handed), list them here. Otherwise, leave the field as-is. If you list any restrictions, these will be displayed on the list of studies when participants view a list of all available studies. Note the system does *not* enforce these restrictions, but it is expected that a participant will only sign up for a study in which they are qualified, as they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set prescreen participation restrictions instead (those are enforced automatically), which you can do after you add the study. This field may be up to 245 characters in length.
Duration	The amount of time, in minutes, that each study session will take. If you are setting up a multi-part study, then there will be the option to specify the duration for each part of the study. For online studies, this should be an estimate of how long participants can expect the study to take, so that they can plan accordingly.
Credits (applies to credit studies only)	Enter the number of credits a participant will earn for the study. 1 credit per 15 mins of duration. Note for Multi-part studies: A value of 0 is acceptable and may be desired in cases where the study is *part of a set of studies, and only the final study is credit-earning*. The credit value specified must be evenly divisible by the credit increment specified. For example, If the increment is 0.5, then the study can have credit values like 1 and 1.5, but not 0.75. If you are setting up a multi-part study, there will be options to enter credit values for each part of the study. The system will compute the total credit value of the study automatically. After a study has sign-ups, you may not change the credit value of the study. However, the administrator can still change the credit value of a study with pending sign-ups. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. A study may not be changed between a study for credit and for payment, after it has been created.
Payment (****_applies to FACULTY paid studies ONLY_****) All <u>student research</u> studies are for <u>CREDIT</u> *only* – **_leave blank_**	Enter the compensation for the study. This is a text field, so any text may be entered like "Amazon Gift Card" or "Up to $20" and so on. Please see the Studies for Pay section of this documentation for more information on how to fill out this field in the case of paid studies. If you are setting up a multi-part study, there will be options to enter compensation values for each part of the study, as well as a total compensation value. You can change the payment text at any time. If this is done, be sure to notify participants with pending sign-ups of the change, as the system will not notify them automatically. This field may be up to 30 characters in length. A study may not be

	changed between a study for credit and for payment, after it has been created.
Timeslot Usage Limit	Depending on how your system is configured, you may see an item that specifies the maximum number of study session hours available to this study. The administrator sets this value, and is the only one who can change it. To determine the current session usage for a study, go to the Add A Timeslot page for the study, or to the Timeslot Usage Summary.
Preparation	Enter any advanced preparation a participant must do here (e.g. "do not eat 2 hours before session"). If there are no preparation requirements, leave this field blank.
Researcher(s)	Select the researcher(s) for this study. Most likely, this is you (and members of your group), and your name will automatically be selected. If you are a researcher, you may not remove yourself as the researcher (the P.I. for the study, as well as the administrator can change the researcher). You will be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The selection box lists only users who are researchers.
Principal Investigator (Faculty member)	Select the Principal Investigator for this study. For student research, select your instructor. The person you select will have full access to the study. If you see this option, then you must select a P.I. The selection box lists only users who are principal investigators.
IRB Approval Code	Enter the IRB approval code here. This field is displayed to the administrator to help them keep track of studies. Depending on how your system is configured, this field may be required. If it is required, then only the administrator can change the IRB approval code once it has been entered.
IRB Approval Expiration Date	The date when the IRB approval expires. This field may *not* appear, depending on how your system is configured. If it *does* appear, you must provide a valid expiration date. The system will prevent you from adding new timeslots to take place after this date, and your study will become inactive (not approved and thus not visible to participants) after this date. You may not make a study active if the IRB approval has expired. Only the administrator can change the IRB approval expiration date once it has been entered. This is the reason why it defaults to blank to force you to choose a date. You may specify a date up to 5 years in the future.
Approved?	For Weber State: Once you have submitted a Project Activation Request, the Lab Manager will review your activation request and approve your study.
	General note:

	You may see an option to select Yes or No. If you Select Yes, this study _will show up_ on the <u>list of studies that participants might sign up for</u>. Ensure you have received the necessary approvals to run the study before choosing Yes. A study must be Approved and Active to show up on the list of studies that participants may sign up for.
	If you select No, the study will not be visible to participants.
	Some systems are configured in a way that only the administrator can approve a study. If that is the case, you should contact the administrator when you are ready to make the study visible to participants (a form is provided on the page to do so). As a researcher, you can always make an approved study invisible to participants (by making it not approved), but you may need the administrator to make it visible again. In addition, if you change key items about the study, specifically the name or descriptions, the study will automatically be made invisible to participants until the administrator reapproves it (depending on how your system is configured). The reason for this is that many IRBs approve very specific language for study names and descriptions, so the administrator needs to ensure the study is in proper compliance.
Email Approval Notice? (Visible to administrators only)	This Yes/No option will appear if the administrator is adding or updating the study that is not already approved. If they select Yes to Email Approval Notice *and* they approve the study (set Approved to Yes) at the same time, then an email will be sent to all researchers for the study, notifying them that their study was just approved.
Active Study?	For Weber State: Select Yes. Until your study has been approved by the Lab Manager, it will NOT be visible to participants.
	General info: Select Yes if this study is in progress. You must select Yes and the study must be Approved if you want the study to available for participants to sign up for. If a study is Not Approved but *is* <u>Active, then it does not show up to participants on the listing of studies</u>, but it is accessible through other links if the participant has participated in it before and are viewing their participation history (in case the participant has follow-up questions about the study). It will also show up on the study information page (for an individual study) where it is listed as a pre-requisite or disqualifier for a study. The reason to select No is if the study is being kept for historical purposes, but should not show up on the list of studies participants can sign up for. Often, this is done so

	the system can enforce prerequisites where the inactive study is a prerequisite for an active study.

Advanced Settings

Field	Explanation
Pre-Requisites (this feature might be disabled on your system)	If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies. You may specify that participants must have participated in *at least one*, if not *all* of the studies specified. The system will handle enforcement of the prerequisites in a strict or lenient fashion, depending on how your system is configured. In strict enforcement mode, the participant must have *received credit for* (participated in) the prerequisite studies. In lenient enforcement mode, the participant must only be *scheduled* to participate in the pre-requisite studies (it is presumed that they will go on to complete the pre-requisite studies). You can ask your administrator how this is configured, if it is of concern. If your system is in lenient enforcement mode and a participant cancels a necessary pre-requisite for your study (they are warned of this), and your study is configured so that the researcher will receive notifications of cancellations or sign-ups, then the researcher will receive notification of the prerequisite problem and can contact the participant if necessary. Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as pre-requisites when they view your study.
Disqualifiers (this feature might be disabled on your system)	If there are any studies that a participant must *not* have participated in, please select them here. You may select multiple studies. The system will handle enforcements of the restriction during the sign-up process. If a participant has signed up for, or participated in, at least one of the studies specified as a disqualifier, then they will not be eligible to sign up for your study. Depending on how your system is configured (Pre-Requisite/Disqualifier Display setting), participants may or may not see which studies you have specified as disqualifiers when they view your study.
Course Restrictions	If you would only like participants enrolled in certain courses to participate in your study, select the eligible courses here. Participants who are not in at least one of the courses you selected will not see the study when they view the list of available studies. You may choose No

	Restrictions if you would like to make the study available to participants in any course. There is a limit to how many courses can be listed as course restrictions for a study, and the limit is somewhere between 60 and 80 courses. The limit is varied depending on a few factors, in addition to the system will simply not save the course restrictions for any courses that would take it over the limit. Note that course restrictions do not function as a disqualifier but rather a qualifier. For example, if a participant is in both Course A and Course B, and the study is restricted to only those in Course A, the participant is eligible because they are in Course A, despite the fact Course B is not listed as a course restriction. In addition, using the same example above, the participant may assign the credit from the study to any of their courses, including those courses not listed in the course restriction (Course B in this example). Course Restrictions function solely to qualify participants for a study, and not to restrict their ability to assign credits to courses.
Invitation Code (this feature might be disabled on your system)	If you would like to have a special sign-up password for this study, enter it here. This is known as an invitation code and applies just for this study. Participants must know the invitation code to sign up for this study. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants. Invitation codes are *not* case sensitive, and are in no way connected to any passwords users use to log in to the system. If you do not need an invitation code, leave this field blank.
Is this a web-based study? (This feature might be disabled on your system)	This will list if the study is an online study, and the type of online study. This setting cannot be changed after a study is added.
Should participants be identified only by a unique, random ID code?	If enabled, then researchers will not see participant names, but instead an ID code to identify them. This setting only applies for online studies, and only if ID codes aren't already enabled system-wide by the administrator. For external web studies, this setting is useful primarily in conjunction with placing %SURVEY_CODE% in the Study URL. Once this setting is enabled (to show ID codes), it cannot be changed back to showing names again.
Study URL	The URL (web address, usually starting with https://) for your study. This is only required for web-based studies administered outside the system.

	If you are setting up a web-based study outside the system and would like the system to pass a unique identifier in the URL so that you may easily identify participants and even have the system grant credit automatically, add the text %SURVEY_CODE% in the URL where you would like the identifier to be placed. This feature is most commonly used with online survey products like Qualtrics, SurveyMonkey, LimeSurvey, SurveyGizmo, and similar products. This is discussed in further detail in the Web-Based (Online) Studies section of this documentation.
Study URL Display (external web studies only)	If set to Yes, then participants may still access the Study URL even after they have been marked as having participated in the study. If set to No, the URL will not be available to them. In all cases for external web studies, the URL will not be displayed until they have signed up for the study. Regardless of this setting, the URL will not be displayed after the timeslot is in the past.
Participant Sign-Up Deadline (this feature might be disabled on your system)	Enter the deadline date (before the study is scheduled to occur) that is the last possible date a participant may be allowed to sign up, in whole hours.
Should the Researcher receive an email notification when a participant signs up or cancels?	If set to Yes, the researcher for this study will receive an email notification whenever a participant signs up or cancels their sign-up for this study. The email notification will be sent to an email address based on the information the researcher has provided. See the Email Address Options section of this documentation for more information on how the email address is determined. Emails will contain the first 50 characters of the study name as part of the subject line in order to make it easier to sort the emails within an email program. If set to Yes, researchers will also receive a notification if the system is in lenient pre-requisite enforcement mode; and a participant cancels a study that was a pre-requisite for the current study. Read the section on Pre-Requisites in this table for more information about this situation. Emails are sent to all researchers specified for the study, unless a specific researcher is assigned to the timeslot that the email notification is being sent about. See Timeslots Linked to Specific Researchers for more information.
Researchers at Timeslot-Level	If set to Yes, it will be possible (but not required) to assign a specific researcher from the list of researchers for the study to a specific timeslot. If set to No, then it is presumed that all researchers assigned to the study are responsible for all timeslots. See Timeslots Linked to a Specific Researcher for more information. This option only appears if the system is configured to allow multiple researchers per study.

Automatic Credit Granting	If set to Yes, timeslots that are more than a specified number of hours old and still in the Awaiting Action state will be changed to a credit grant. The check for timeslots in this situation is made only once per day. If an automatic credit grant is done, you may still change it later if necessary. For online external web studies, the credit grant will take place (the specified number of hours) after the timeslot (participation deadline) has occurred (as opposed to being based on when the participant signed up. This feature is generally not useful in this situation. The option will not appear for online survey studies (within the system) because credit granting generally occurs Automatically, immediately after the participant completes the survey.
Can a participant sign up for this study more than once? (This feature might be disabled on your system)	If you would like to allow participants to sign up (and receive credit) for your study more than once (at different times), choose Yes. Otherwise, choose No. If No is chosen, participants may only sign up for the study more than once if they had previously failed to show up for the study (a no-show).
Shared Comments	This is an optional area where you may enter any comments or notes about the study. These are visible to any researchers and PIs in the system, but not to participants. This field is useful if you want to make the technique used in the study visible to other researchers, so they can set your study as a disqualifier if necessary. This field can be up to 1,000 characters in length.
Private Comments	This is an optional area where you may enter any comments or notes about the study. These are only visible to the researchers (and PI) for this study. These are not visible to participants or to other researchers or PIs in the system. This field can be up to 1,000 characters in length.
Research Alternative?	If set to Yes, then this study is considered a research alternative study. For various reasons, some participants may be restricted to participate in regular studies (typically, for accruing too many unexcused no-shows or being unable to consent), meaning that they can only sign up for research alternative studies. Only an administrator may change this value (the default is No).

Multi-part Settings (only applies if you select Multi-Part Standard Study on the Select Study Type page)

Field	Explanation
Total Payment **(paid FACULTY studies *only*)** All <u>student research</u> studies are for **CREDIT** *only.*	Enter the amount of total compensation for the study, typically the sum of the payment values for each part. The system cannot compute this automatically since it is

	possible to enter nonnumeric values (e.g., "Amazon Gift Card") in the other payment fields.
Part X Scheduling Range	Specify the number of days (as a range) after the previous part is scheduled, that this part should be scheduled. The range may be the same value (e.g. "between 7 and 7 days") if desired, but must be a whole number. See "Multi-Part Studies" for more information.
Part X Scheduling Leniency	In some cases, you may want to ensure that the participant schedules the next part of the study to take place at exactly the same time (on a different date) as the previous part. If so, choose Yes for this option. If there is some flexibility to sign up any time within the Part X Scheduling range, choose No for this option.

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information.

Online Survey Studies

Introduction

This system includes a rather extensive online survey feature (if enabled on your system). It allows you to set up an online survey as a study within the system, so participants who sign up for the study will be immediately asked to complete the survey. Upon completion of the survey, they will be granted credit automatically by the system. You may then analyze their survey responses on an individual basis, or download the raw data across all participants who completed the survey for further analysis. There is a chance that you may notice a discrepancy in the number of responses when analyzing a single question compared to downloading the entire set of responses. This can occur if a participant is currently taking the survey, but has not completed it. Their data is included in the single-question analysis (when available) but not in the full download of responses, as there is not a full set of data for an in-progress survey. The system will prevent participants from completing the survey more than once, removing the risk of duplicate entries for participants.

In compliance with research ethics guidelines, the participant is given the opportunity to withdraw from the survey at any time. See Participant Withdrawal from a Survey for more information.

There is space to provide closing text for the survey, which is displayed to participants after they successfully complete the survey. This means after they have saved all their responses and cannot go back and edit. This is an ideal place to include any relevant debriefing information.

The online survey feature is complex due to the many features it contains. In addition, your ability to modify the survey after participants have started to take the survey is limited. Because of this, you should plan out your survey well in advance to make sure it is finalized before you make it available to participants. You may find it helpful to plan out the survey on paper before entering it into the system.

A survey may have an unlimited number of sections and an unlimited number of questions per section. We recommend limiting surveys to fewer than 300 questions total, 15 sections total, and 15 questions per section. This is to reduce participant fatigue and to ensure proper system performance. Participant fatigue can be an issue, as they must complete the entire survey all at once. In addition, you should make participants aware that their session may time out because of inactivity. Usually, this means they will be logged out after 15 minutes of inactivity. Inactivity would happen if they load up a section of questions but do not complete and save their responses for that section within that period of time. It is a good idea to structure sections accordingly, especially if a section contains lengthy text or complex questions. The system will warn participants a few minutes prior to this inactivity logout, and provide them with the opportunity to extend their session.

Questions may be free-entry (requiring the participant to type in an answer) or multiple-choice (pick only one or pick many from the list of choices). You may also specify that the system compute participant's results for an entire section, as either a section sum or average score. This computed sum or average can be computed only for numeric, multiple-choice (pick only one) questions in the section. Such computing is often useful when a participant's aggregate score is more important, such as with a depression battery.

For free-entry questions where the participant is asked to enter a free-form text answer, the size of the entry field cannot be resized in terms of dimensions. It can only be resized in length. Participants may enter up to 255 characters in their response.

Sections can be displayed in any order, whether that is specified, random or combination of both. Each section may contain introductory text introducing the section. The survey itself may also have introductory text introducing the survey, as well as closing text that is displayed upon completion of the survey. You may specify that questions within a section be displayed in a random order, or in the order you specify. Multiple-choice questions can have their choices displayed in the entered order or random order. This is specified on a per-question basis. Multiple-choice question choices can be displayed horizontally (across the page) or vertically (down the page).

It is important to note that while the survey feature is quite extensive, there are some things it does not support. It cannot do question timing, where the speed of a participant's response (typically in milliseconds) to each question needs to be measured. It also cannot do branching, where the questions being presented to a participant will vary depending on their answer to other questions within that same survey. For example, asking a question like "Do you smoke cigarettes?" and then presenting a different set of questions based on their response. The reason that advanced features like this are not currently supported is that our software is primarily a participant pool software product that happens to have an online survey feature within it. We asked our customers which features in an online survey were most important to them, and those features exist within the product. There are numerous products on the market specifically for doing online surveys (with no participant pool component), which contain more advanced features. These products can easily be linked from the Sona Systems product by setting up your study as an online study conducted outside the system. (Online External Study)

Creating or Modifying a Survey

To create a survey, first create an online internal survey study. After you create it, you will see the option Update Online Survey when you view the study information. You may not create multi-part online survey studies.

It is important to note that while you are making changes to a survey, it is deactivated so participants may not participate in it. When you go to the Finalize Survey option after you have finished your work with the survey, you will have the opportunity to save your changes and make the survey Active (available to participants) or Inactive (not available to participants). You should always choose the Finalize Survey option when you finish your work with the survey, as the system saves all changes and computes some additional important data when you finalize the survey. If you would like to continue work on the survey at a later date, you should still choose the Finalize Survey option to ensure your changes during the current session are properly saved. It is presumed you would choose to keep the survey inactive in this situation.
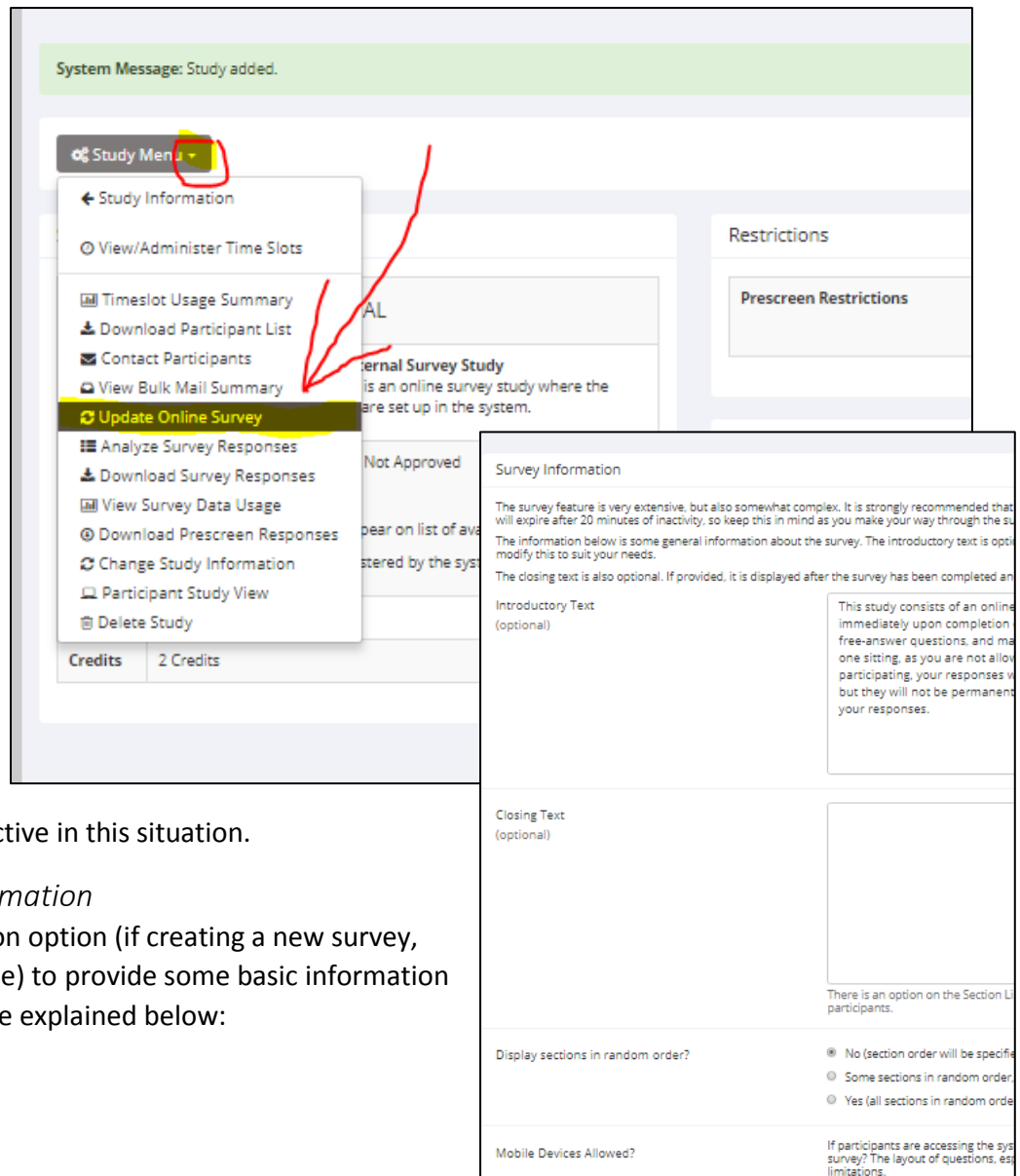
General Survey Information

Choose the General Information option (if creating a new survey, this is the first page you will see) to provide some basic information about the survey. The fields are explained below:

Field	Description
Introductory Text	Optional, up to 10,000 characters in length. Provide a set of text that will be displayed when a participant starts the survey. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). When you first create the online survey, the system may automatically insert some basic default text in this area. You may change any of this text as much as you like – the system will not change it back later as long as you save your changes. This is a good place to place any text for informed consent purposes. You may view how this text is displayed to participants by saving it, then going to Preview Introductory Text, which is available from the Section List page.
Closing Text	Optional, up to 7,000 characters in length. Provide a set of text that will be displayed after a participant completes the survey and saves their responses. This is an ideal place for debriefing information. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). You may view how this text is displayed to participants by saving it, then going to Preview Closing Text, which is available from the Section List page.
Display sections in random order?	If set to Yes, the participants accessing the system using the mobile version (app) on a mobile device like a smartphone or tablet will be allowed to participate. If the survey makes use of images or question and choice layout is important, it may be better to set this to No as the layout may be rendered differently on devices. Especially on devices like smartphones with small screen sizes. For technical reasons, there is no easy way to preview how questions will look on a mobile device except to login as a test participant using an actual mobile device.
Participant response review/change	If set to Yes, then participants may review and change responses just before they complete the online survey. They are given this opportunity after they complete the last section of the survey, before any closing text is shown. At this point, they can see all their responses and go back to any section to change them. Once they complete the online survey, they cannot go back at a later date and change any responses. It may be useful to set this option to No (so that they are not allowed to review or change their responses at the end of the survey) if sections are somehow dependent on one another. Meaning that allowing participants to

	change their responses may affect the integrity of data collection.

Section List

Depending on if you are adding or editing the survey, you will be taken to the list of sections for the survey. Here you can change the order that sections will be displayed, if you have not enabled full random section ordering for the survey, and see a quick review of each question. From here you can also add a question to any section and edit any question. To add a new section, choose the Add a New Section choice at the bottom of the page.

If you have enabled partial random section ordering, then you can specify a section order for the sections you would like displayed in a specified order. For the sections you would like displayed in random order, leave the Section Order item blank. When you specify a section order, use each number once. Use the numbers 1-98 if you would like the section to be displayed *before* the random-ordered sections, and the numbers 100-199 if you would like the section to be displayed *after* the random ordered sections. Be sure to use each number only once, or leave the number blank to make the section part of the random-ordered section. Sometimes it is useful to use partial random ordering if you want to ask basic (e.g. demographic) information in the first few sections, while asking more analytical questions in the random-ordered sections. You may also want to ask about the previous random-ordered sections after they are completed. It is not possible to intersperse ordered sections within the set of random sections, like having 2 ordered sections, then 3 random sections, the 1 ordered section, then 2 random sections, etc. The random sections are treated as an entire block of sections, and other sections cannot be placed at specific places within that block.

There is also a Preview Section option so you are able to preview the survey, as participants will see it.

Survey Section List

Surveys are made by creating sections, and placing questions in each section. You must have a least ① section to create a survey.
Below is a list of sections and a short summary of questions in each section. You may edit each section, the questions within it, or delete a section. You may also add a new section or copy from an existing section. You may change the ordering of the sections by changing the number next to each section. Use each number only once, and enter only whole (e.g. 1,2,3) numbers in the field.

[Add a New Section] [Copy From an Existing Section]

You may change the ordering of the sections by changing the number next to each section. Use each number only once, and enter only whole (e.g. 1,2,3) numbers in the field.

The (SEC###) listed next to each section refers to the unique internal system identifier for the section, which can be matched up to the Section ID field when downloading the question key. This identifier is not displayed to participants.

You may preview introductory text or preview closing text for this survey. If you are finished working with this, please go to the final review to finalize it and any changes you made to it.

[Preview Introductory Text] [Preview Closing Text] [Final Review]

Section List

0 Sections. You may add a new section using the option below.

Add a New Section

Note that once any participant has started the survey, you cannot change the score computation type (between average and sum, or from none to average or sum), nor can you add new questions to the sections that allow numeric responses. You may only turn off the computed score entirely. Plan your survey wisely before making it available to participants.

You may also provide introductory text for the section. Participants taking the survey will see all questions for one section on the same page, and the introductory text will be displayed at the top, if provided.

In some cases, it may be easier to copy from an existing section and then modify the questions in that section as appropriate.

[Copy From an Existing Section]

| Display Questions in Random Order? | ○ Yes |
| | ⦿ No |

Computed Section Type	⦿ No sum or average score (across all questions in section) is computed.
	○ Average (mean) score for each participant is computed.
	○ Sum score for each participant is computed.

| Introductory Section Text (optional) | Listed below are questions for this section of the survey. 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. |

Adding or Modifying a Section

To add a new section, choose the Add New Section link at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.

There are three pieces of information you may provide for each section. First, you may specify some introductory text to be displayed at the beginning of the section. When participants take the survey, they view one section at a time with all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in

that section. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in "<p>" (without the quotes). The introductory text is up to 15,000 characters in length.

You may choose if the questions for that section are displayed in random order or in the order you specify.

You may also choose to have the system compute a section sum or average (for each participant) for the section. These scores are computed only for all the multiple-choice, numeric questions in a section, where only one choice may be chosen. Think carefully about setting this value, because you are very limited in your ability to change it after participants have started to take the survey.

Computed section sums or means are often useful when all the questions are using a unidimensional scale (1-5, for example), but a participant's average score response to the section is more useful to account for their outlier responses.

Depending on if you are editing or adding a section, after you save your changes, you will be taken to a page to add a new question or to the section list.

Adding or Editing a Question

To add or edit a question, choose the appropriate choice from the Section List, next to the desired section. Questions will be displayed in the order they are added to a section or in a random order, depending on the section settings, and you may reorder the questions later. Depending on the state of the section and if participants have taken the survey, some options will be automatically set for you, and not changeable. All fields must be filled out.

Field	Description
Question Text	The text for the question. This will be displayed above each question's choices. Up to 15,000 characters maximum.
Abbreviated Question Name	A 15-character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format. Many statistical analysis programs limit column names to 15 characters.
Question Type	Multiple-Choice (select one), Multiple-Choice (select many) or Free Entry. If the section has a computed average or sum, you may be limited in your ability to add Multiple-Choice (select one) non-numeric questions. Free entry choices may contain a response up to 255 characters in length.
Display length of Free-Entry field	Specifies the length (size) of a free-entry field when it is displayed. Acceptable values for this setting are 5-85, and the field will always allow participants to type in up to 255 characters in length. The height of the field cannot be adjusted. This setting only applies to Free Entry questions.
Display choices in random order?	If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple-choice questions.
How should the choices be displayed?	Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed. Often, the horizontal display is effective when the question involves

	a scale. This setting applies only to multiple-choice questions.
Can participants decline to provide an answer for this question?	If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question. The default when adding a new question (not copying an existing question or section) is set to Yes for ethical compliance.
Are all choices numeric?	If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple-choice questions. Sections with a computed section sum or average may not contain non-numeric multiple-choice (select many) questions.
Display numeric value?	If set to No, the numeric value of the choice is not displayed to participants. This only applies to numeric, multiple-choice questions where each choice includes both a numeric value and associated text (e.g. "5 Strongly Agree"). This is useful when running a reverse scale.

If the question is a multiple-choice question, you must also fill out the choices section that is part of the same form. A minimum of one choice must be provided for the question. Each choice may be up to 255 characters in length. When adding a question, there is space to add up to 10 choices. If you need to add more choices than this, simply add the question and go back to update it, and there will be an option to add more choices.

 If the question is specified as numeric, you must provide a numeric choice. That choice must be a whole number (e.g. -5, 1, 0, 349). If you would like to provide descriptive text to accompany each numeric choice, you may do so by typing in the numeric choice and leaving one blank space after it, then type in the descriptive text. For example "5 Strongly Agree". If you provide descriptive text along with the numeric choice, then you have the option of hiding the numeric value from participants, by choosing No to the "Display numeric value?" setting for the question. This is useful in reverse scale or other situations where the numeric value for the choices is not important.

When adding a question, if the choices you specify do not conform to the configuration of the question (e.g. specifying a non-numeric choice for a numeric question), the system may change the question configuration to ensure that the choices are then valid.

Copying a Section

You may copy a section from any of your own surveys into your current survey, by choosing "Copy From an Existing Section" in the Section List. You will see a list of eligible surveys to copy from. After you choose which survey to copy from, you will see a list of eligible sections in that survey. Once you choose a section, it will be copied into the survey you

are currently editing. You may copy only one section at a time. This is due to the system performance impact when copying sections.
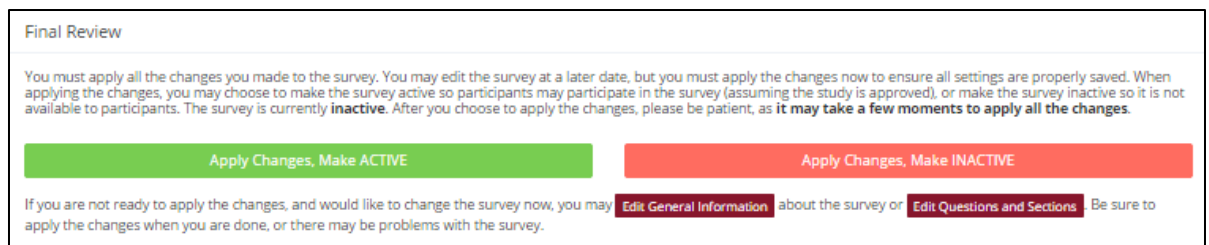
The administrator also has the ability to copy to or from the prescreen, so ask the administrator to do this for you, if you need it done.

Copying a Question

For multiple-choice questions in particular, it is often the case that many questions have the same measures (choices). To make entry of similar questions easier, you may use the Copy Question feature to copy a question of any type. To copy a question, select the question you would like to copy when viewing the Section List. You will then be taken to a list of sections where you may copy this question. The default is set to the section the question came from. After you decide which section you would like to copy the question to, you will be taken to a page where you can make any final changes to the copy of the question before saving it.
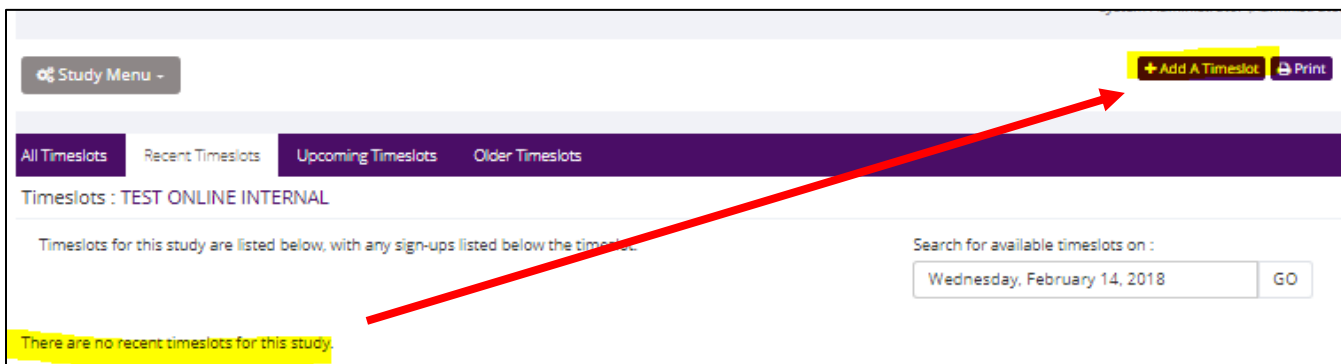
Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing of the survey later, it is **imperative** that you go to the Final Review step. The system needs to save certain special changes and make some computations. If you do not want participants to participate in the survey yet, you can save changes but keep the survey inactive. Once you save your changes it may take a moment to save all the changes, as the system is performing a number of computations on the survey. Please be patient, as these computations are done to make performance for participants as fast as possible. The system tracks which user last made the survey active or inactive and when they did this. This information is displayed on the setup page.

Final Review

You must apply all the changes you made to the survey. You may edit the survey at a later date, but you must apply the changes now to ensure all settings are properly saved. When applying the changes, you may choose to make the survey active so participants may participate in the survey (assuming the study is approved), or make the survey inactive so it is not available to participants. The survey is currently **inactive**. After you choose to apply the changes, please be patient, as **it may take a few moments to apply all the changes**.

| Apply Changes, Make ACTIVE | Apply Changes, Make INACTIVE |

If you are not ready to apply the changes, and would like to change the survey now, you may **Edit General Information** about the survey or **Edit Questions and Sections**. Be sure to apply the changes when you are done, or there may be problems with the survey.

Creating an Open Time Slot for an Online Internal Survey Study

In order for participants to access your survey, you will need to create one open timeslot. Go to the Study Information Page. From the Study Menu, select "View/Administer Time Slots". The following page will show that there are no timeslots set up for this study. Select "Add a Timeslot".

Study Menu   **+ Add A Timeslot**   **Print**

All Timeslots   Recent Timeslots   Upcoming Timeslots   Older Timeslots

Timeslots : TEST ONLINE INTERNAL

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

Search for available timeslots on :

Wednesday, February 14, 2018   GO

There are no recent timeslots for this 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.

NOTE: You are adding timeslots to a study that is **inactive and unapproved**, so participants will not be able to sign up for the study until it has been approved.

Add Timeslots : TEST ONLINE INTERNAL

This study was created as an online survey study. You should create *only one* timeslot. The single timeslot should contain the maximum number of participants who may participate, and have a final participation date of the last date that participants may participate.

NOTE: You are adding timeslots to a study that is **inactive and unapproved**, so participants will not be able to sign up for the study.

Final Participation Date	Friday, March 16, 2018
Final Participation Time	9:00 AM
Max. Number of Participants	999

Add This Timeslot

Once you've entered in the appropriate information, save your timeslot by selecting "Add This Timeslot". Your study will become visible and accessible to participants once it is approved by the Lab Manager. (See *Submitting a Sona Systems Study Approval Request* link on the Weber State Psychology Instructions for Primary Investigators webpage)

Viewing a Survey as a Participant

If you would like to see how the survey would be displayed to participants, that can easily be done while setting up the survey. Next to each section in the section list, there will be a Preview Section link so you can view the section exactly as participants would see it. You may also view how the introductory and closing text will appear to participants, by choosing the Preview Introductory Text and Preview Closing Text options that appear on the Section List page.

Participants will see a basic progress display on the top right corner of each page. This display lists the section they are on (ordinal counting), and how many sections total are in the survey. When using Preview Section, you will see this progress display as well. Everything except the current section number will appear as "X" in preview mode since it is not an actual participant taking the survey (and randomization of section order may be involved).

If you find it necessary to go through the entire process as a real participant, you can do so by creating a test participant account. Set the online survey study so it has an invitation code, this way no other participants can sign up (since they will not know this invitation code). Then, sign up with your test participant account and take the survey. You can remove the invitation code later if necessary.

Participant Withdrawal from a Survey

At any time while participating in the survey, participants have the option to withdraw from the survey. A Withdraw button will appear at the top right corner of each page.

When a participant withdraws, they have the option to withdraw *without* the option to receive credit, or *with* the option to receive credit.

If they choose to withdraw *without* the option to receive credit, all their survey responses as well as the record of their sign-up will be deleted. Participants are told that this option should be used if they want to later participate in the survey. This scenario would likely be used when a participant starts a survey but realizes they won't have sufficient time to complete it at the moment, but would like the opportunity to participate later. Notification will not be sent to researchers in this scenario.

If they choose to withdraw *with* the option to receive credit, then all their survey responses will be deleted, but a record of their sign-up will be kept and be in awaiting action state. The researcher will receive an email about the withdrawal, as well as some basic information about how far along the participant was when they chose to withdraw, both in time spent and number of questions completed. This information is provided in case there is a policy of granting credit for early withdrawals based on time spent or percentage completed. Participants also have the option of including a

message that will be sent to the researcher to explain their withdrawal. However, such a message is not required. The researcher should then grant credit to the participant if necessary, by going to the timeslot and finding that sign-up.

Participants are informed that if they are unsure which of the withdrawal options to choose, they should choose the withdraw option that retains their ability to receive credit. The withdrawal option cannot be removed, as it is there to ensure compliance with research ethics guidelines.

Viewing Survey Data Usage and Deleting Survey Data

The system has a limited amount of storage space and you are expected to download the survey data you have collected on a routine basis, and then delete it from the system. By going to View Survey Data Usage, you can see how much database space is being used. You can then download the survey data (a link is provided), and delete it from the system.

When you delete the data from the system, all survey data collected within the last 5 minutes will *not* be deleted, as a precaution. This is to ensure that you have had adequate time to download the survey data before deleting it (to account for the time between downloading the data and deleting it).

If you choose to delete the survey data in this manner, the record of participant sign-ups *will* be retained. That way you can ensure the participant does not complete the same online survey again.

Deleting a Single Participant's Survey Responses

On rare occasions, you may want to delete a participant's survey responses, usually so they can participate again. To do this, cancel their sign-up and that will delete their responses. Note this will also remove any credit they earned. See Manual Cancellation for more information.

Analyzing Survey Responses

You may analyze a specific survey question on-screen by selecting the survey and choosing the Analyze Survey Responses option. From there, you may choose a specific question and view or download the response data. This will include data from participants who are still in the process of completing the survey, but have not yet completed it. The Download Survey Responses option, which provides the entire set of survey responses for all participants, includes only data from participants who have completed the survey. This is done to ensure easier data analysis.

In rare cases, you may notice that a few responses for certain questions appear (or disappear from) the Analyze Survey Responses while never showing up in Download Survey Responses. In this situation, a participant has started an online survey but never fully completed it or withdrew from it (they more than likely just closed their web browser). The system goes through all "orphaned" responses in this situation and clears them out once they are more than 2 days old.

It is presumed that you will want to analyze the survey data across all questions. In this case, you should choose the Download Survey Responses option.

To successfully analyze the data, you will need to download 2 sets of data. The first is the question key, which lists a unique numeric identifier for each question, along with the question text and abbreviated question name. It also includes the section number that each question was in. Note the section number listed is merely a unique identifier for each section, and has no correspondence to the order in which sections were presented. Also note that section mean and sum values, if calculated, will normally be at the end of the list of questions. This data is in CSV format and is available by clicking the Download Question Key link on the Download Survey Responses Page.

After you download the question key, you can download the survey data. The data may be separated into parts if there is an excess of data to download. The system will adjust the size of each part based on how many questions are in the survey. A survey with a large number of questions will be broken into more parts, with fewer rows of data per part. The default option is to download the entire set of survey data, meaning all parts at once. If you receive an error when doing so, then download each part one at a time. There may be too much data in the combined download for the system to process.

You may also choose to limit the download based on date range. This is based on when the participant completed the survey. If you choose a date range, this merely filters each existing part of the download. This means that some parts may be empty if no participants whose responses would normally be included in that part completed the survey during the specified date range.

There are three options for downloading and viewing the data (both the question key and responses):

1. Download as CSV File. This is the most popular option. It allows you to save the data on your computer and load it in your preferred data analysis tool.
2. View On-Screen (CSV Format). This option lets you view the data on-screen instead of downloading it. The data is still displayed in CSV format, and is a good way to view the format of the data, as well as ensure all the data you expect is there. Often with larger datasets, downloading and viewing the data with some tools like Excel may make it appear as if not all the data is there, when in reality it's a limitation of the tool and not a problem with the data download. The on-screen option is also useful if data was collected in a language that uses Unicode character sets, like Hebrew.
3. View On-Screen (Table Format). This option provides an easy way to view the data on-screen (to visually analyze the data) but is not very useful for purposes of loading the data into an analysis tool.

The data is presented as one row per respondent, with each of their responses in a different column. The first row includes the column headings, and the column heading maps to the abbreviated question name. Since there is no feature to specify an abbreviated question name for the computed section sum/mean item, the system automatically assigns a unique name to those columns. The naming convention is SECXXX where XXX maps to the system's internal section identifier for that section (section_id). You can use the question key to determine which question maps to which column. The order of columns (questions) in the data download is not necessarily the same as the order of questions in the survey. These columns are ordered based on how the data is stored internally in the system. The data also includes the exact time the participant started and completed the online survey. You can use any common data analysis tool to compute how long it took the participant to complete the survey, using this information. There is also a column listing how many minutes it took the participant to complete the survey, rounded to the nearest minute.

There will be an option to include only the numeric response portion of questions that are multiple-choice with numeric choices. This is useful if the numeric question was set up with associated text, but that text should not be included in the analysis file. One example would be where the response selected was "5 Strongly Agree" but only the number 5 (and not the associated text) is useful during analysis. If you choose this option and download data and find that the associated text is included with the numeric response, then have a closer look at the survey. More than likely the question was not actually set up as a numeric question. The easiest way to deal with this downloaded data is to use a data analysis tool to do a search and replace to change the response in your downloaded data into a numeric format. Your IT department can provide assistance with such tools.

If your survey has a lot of questions (and thus columns in the output file), you may have trouble loading the data with some spreadsheet programs. Those of which are not equipped to handle such large datasets. Your best option is to use a full-featured statistical analysis package, like SPSS or SAS. Those packages handle large CSV-format data imports with ease. Your IT department can help you to select the best tools. In particular, Excel has trouble dealing with datasets with more than 250 questions (columns).

Frequently Asked Questions about Online Surveys

Is it possible to have multiple versions of an online survey? Will participants be randomly assigned to one version of the survey at the start of the survey?

> The best way to do this is to create multiple online surveys and use a prescreen participation restriction that is unrelated to your research. To save time, you can easily do this by copying questions between them with the Copy Section Feature. For example if there is a prescreen question asking for the last digit of the participant's

university ID number, assuming this is randomly distributed, then you can use that to easily break up the pool into random tenths by using that as a prescreen participation restriction for each version of the study.

Is there a way to post images, graphics, or videos in the online survey, so that participants can respond to questions referring to the image or video?

Yes. You will need to have the ability to post images on a webserver (most likely at your school), and know a small bit of HTML. Let's say your graphic is located at http://www.yourschool.edu/myimage.gif

Put this in the place where you want the image to be displayed: <IMG SRC="http://www.yourschool.edu/myimage.gif">

If you're unfamiliar with HTML, you may want to ask your IT department for assistance with this. You can use a similar process to post videos, but you'll need to ask the person in charge of the webserver where you post the video for the best HTML method for linking to it, as there are several different methods to link to videos.

You cannot upload images or videos directly onto the Sona Systems server, but every university provides a facility to post content on webservers at the school. This method is better for participants as the data (images and videos are usually quite large) will be stored on the high-speed network within the university.

Can certain sections be presented for a specified period of time (e.g. 60 seconds)?

No, this feature is not offered. There are technical limitations and inaccuracies in how web browsers interact with web servers, as well as Internet latency factors that make this difficult to do.

Can I make an online study a multi-part study?

Online studies cannot be multi-part studies. The reasoning has to do with what multi-part studies are intended for. They are used when the researcher needs to ensure a fairly strict separation between each part. For example, in memory research, a researcher may want to set up each part exactly 14 days apart.

The issue with online studies is that they are not scheduled to take place at a certain date and time, so it's impossible to enforce any kind of strict separation between each part.

If the goal is a follow-up to a study, then the time separation presumably is not very important. In that case, the best solution is to set up two studies and set the first study as a pre-requisite for participation in the second study.

Is there a method to upload a survey into the system (from Word, Excel, etc.)?

For online survey studies, there is no method to upload the data. There is no standard format for survey data representation, so there was no format to support for uploading.

In the online survey feature, there is the ability to copy questions and sections. This may make it easier to set up the survey if many questions have the same sets of choices, for example.

When a participant is taking an online survey study, when is their sign-up actually recorded in the system?

The system will not record completion or sign-up of an online survey study until it is actually completed, or if the participant chooses to withdraw early. Participants are shown the closing text as the last step of the online survey study, just after their responses have been saved and their sign-up is recorded.

When they start the online survey study, it is noted to participants that their responses are not fully saved until they complete the study. Only then will they be properly recorded. This is for both technical and IRB reasons.

I have created my online survey and participants cannot see it. I have ensured that all the prescreen restrictions, course restrictions, and pre-requisite/disqualifier restrictions are set correctly. Why is it not showing up?

You need to set up at least one timeslot. The standard method for an online survey is to set up only one timeslot for the survey, to specify the participation deadline. If you still have problems, contact the administrator and ask them to run Check Study Configuration on your study. That will explain why a study is or is not showing up.

My online survey had 5 spaces in a timeslot, and somehow 6 people signed up and received credit. How did this happen?

This is a rare situation that occurs, usually with online surveys that take a long time to complete on a system with a high rate of study sign-ups. What happens is that all 6 people, or at least the last 2 people, started the online survey at around the same time, before any of them could finish it. The system checks at the point of sign-up to see if there are open spaces for the online survey, but does not consider someone who has already started the online survey but not finished it, as taking up one of those places. This is done just in case that person abandoned early without properly withdrawing. In this rare situation, there is no choice but to credit all participants who successfully completed the survey. It is the only fair outcome for participants. It is important to note that this situation is quite rare. It is most likely to occur when the survey is lengthy, and there are many participants vying for a limited number of available timeslots in the system.