SONA SYSTEM
Psychology Researcher Handbook

Contents

Introduction

Recruiting participants is a vital part of the research process. However, such recruitment is often time-consuming and, in some cases, can be rather difficult. In order to support researchers in their recruitment of research participants, the Department of Psychology at Aberystwyth uses **SONA** to timetable and reward research participation by undergraduate students. SONA is a web-based experiment management system that provides an easy way for you to recruit and reward participants who take part in your research studies. With SONA, you can recruit participants for lab-based studies, questionnaire or survey studies, online/web-based studies, qualitative and focus group studies, large group studies and much more. Within SONA, for each study a participant completes, they are awarded a number of SONA Credits. As an incentive to participate, undergraduates are required to collect SONA Credits across their first and second year in order to enable them to use the SONA system themselves to recruit participants for the final year projects.

System Overview

The purpose of SONA is to allow eligible researchers – typically staff, postgraduates and final year project students – to recruit participants for their research studies. SONA does this by allowing researchers to list their research studies as part of an on-line system. Then, participants simply login to SONA, browse the list of available studies, choose timeslots that suit them and sign up instantly. SONA informs you as the researcher when someone has signed up so you can book rooms, equipment etc. as required. SONA automatically reminds participants of the time and location of their appointment, and once the study is complete, SONA will automatically grant your participants the appropriate number of SONA Credits.

Requirements

Technical Requirements

SONA will work with any internet-connected device that has a web browser. No special software is required.

Participation Requirements

The Department of Psychology has introduced SONA as a way of managing the available pool of undergraduate participants in the Department. As part of their research methods training, undergraduate students are required to take part in a **minimum of three research studies per year**. This equates to approximately 3-9 SONA Credits per year, depending on the number of SONA Credits on offer by the studies on offer. The studies advertised on SONA will be a mix of final year projects, postgraduate and staff research projects. Undergraduate students will be expected to select studies that interest them and sign up to participate. Under this system, there should always be a pool of available participants looking to take part in research in the Department.

Registering for the system

Before you can use SONA, you need to be registered for the system. This should be done automatically at the start of term. If you have not received a SONA password, please contact Matt Wilby, SONA Administrator (mlw11@aber.ac.uk).

Getting started with SONA

SONA is a web-based system. To login, go to http://aberpsych.sona-systems.com. You can also access SONA via the Psychology Department webpage or via Blackboard links in PS11300, PS21410, PS21310 and PS33100/PS34100.

Logging in

Your user ID is the same as your University e-mail ID – e.g. if your e-mail is viw8@aber.ac.uk, your SONA ID is viw8. Please note that your password is **NOT** the same as your e-mail password. You should login using the password you were given at the start of term. We recommend changing the password as soon as you login for the first time.
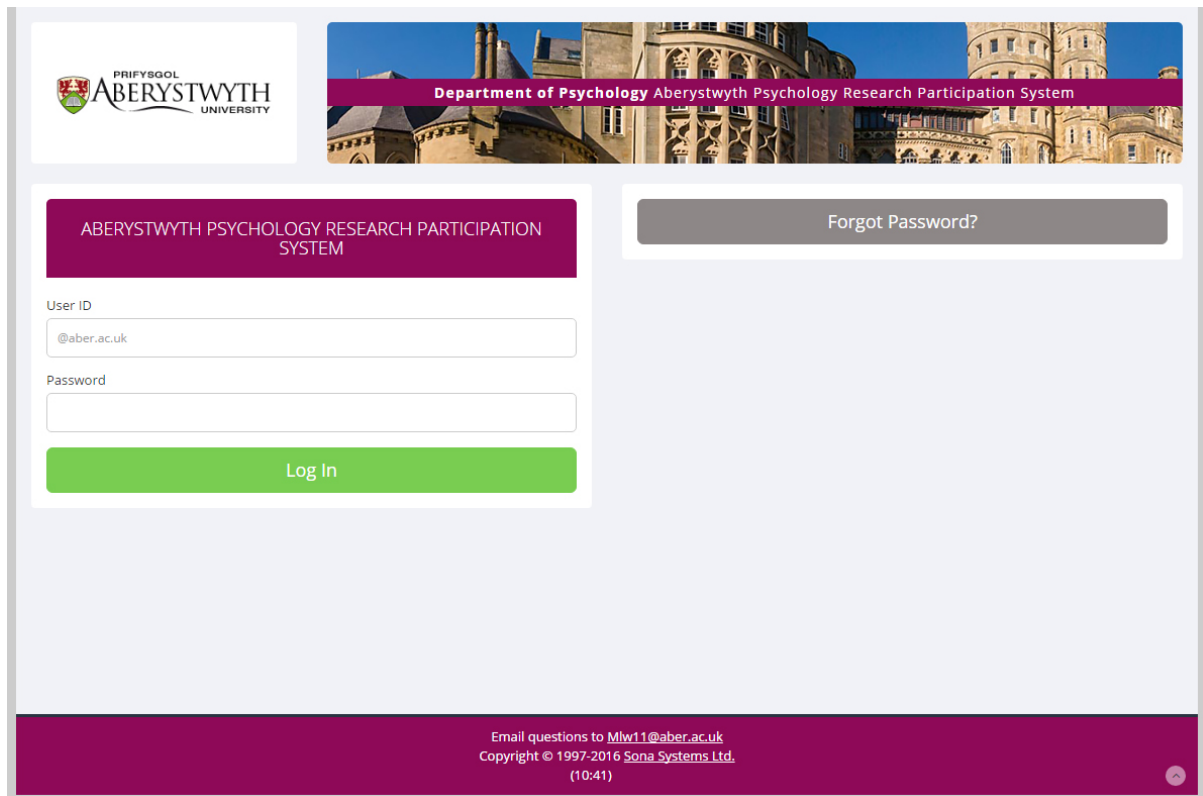
SONA allows you to use the system in two ways – as a **researcher** and as a **participant**. If you are looking to advertise your research project, you should sign in as a researcher. If you are looking to take part in other people's research, you should sign in as a participant.

Resetting your password

If you have forgotten your password, simply click **Forgot Password?** on the main login screen.

Logging out

To log out of SONA, click the **Logout ➲** button in the top right-hand corner.

Setting your profile/Changing your password

Clicking **My Profile** in the top right-hand corner of the screen enables you to specify an alternate e-mail address (optional) and to change your password.

Using SONA as a Researcher

System Basics

Within SONA, you create **studies**. Each study has one or more **timeslots**, which are the times that you plan to run your study. **Participants** sign up for timeslots by viewing a list of studies and available timeslots. Once your participant has completed your study, SONA will automatically grant them the allotted number of HP (unless you tell the system not too – for reasons discussed below).

Home Screen

Once you have successfully logged in to SONA and reviewed the ethics and privacy policies, you will see the Home Screen.

Viewing Studies

To view all currently available studies, once you have logged in, click **All Studies** at the top left-side of the home screen. For details on how to sign up as a participant, please see page XX.

Creating a study

Process

The basic process of adding a study to SONA is as follows:

1. Receive ethical clearance for your study from either the Department of Psychology or the University Research Ethics Committee
2. Add your study details to SONA
3. Receive approval from the SONA administrator
4. Create timeslots for participants to sign-up
5. When sign-ups happen, ensure you have booked labs/equipment as needed.

Adding a Study

To add a new study, click **Add New Study** at the top-left of the Home Screen.

You then need to specify what type of study you are running. A **Standard Study** is for use in studies where there is just one part (e.g. lab experiments, paper-based questionnaires, interviews, focus groups etc.) **Two-Part Standard Study** is for use with studies that have two sections that take part on different days. **Online External Study** is for studies that will collect data using online resources such as SurveyMonkey or BOS.

Select the type of study you require and click **Continue**.

Adding a Standard Study

In this example, we will be creating a **Standard Study**.

Basic Study Information

Study Name	
Brief Abstract	
Detailed Description	
Eligibility Requirements	None
Duration	20 Minutes
SONA Credits (SONA Credits must be evenly divisible by 1)	1
Preparation (Up to 255 characters, optional)	
Researcher	Rahman, Rachel ▼
Principal Investigator	Wright, Victoria ▼
PDEC Approval Code (optional)	

Basic Study Information

In this screen, you are required to give some basic details about your study.

Basic Study Information	
Field	**Explanation**
Study Name	A short (up to 100 characters) but informative name for your study. For example 'The effect of colour on object recognition – an eye-tracking study'
Detailed Description	Describe your study here in sufficient detail for participants to decide if they want to take part. For example, you might explain that participants will be taking part in a computer-based eye-tracking study where they will be asked to recognize a variety of objects. The speed and accuracy of responses will be measured, as will eye-movements made in response to on-screen objects. This is your chance to sell your study – so make it appealing to potential participants.
Eligibility Requirements	Some studies are open to all participants. Others may have specific criteria participants must satisfy in order to be able to take part. For example, for the eye-tracking and object recognition study, participants

	should have normal (or corrected to normal) vision and should not be colour-blind.
Duration	The amount of time in minutes that a study will take to complete. **THIS MUST BE A MULTIPLE 0F 20** – thus, studies should be 20, 40, 60 etc. minutes in duration. If you study's duration falls in-between (i.e. 30 minutes) you should round up to the next 20 minute unit (i.e. round up to 40 minutes). When estimating the amount of time required, do not forget to include sufficient time for informed consent, briefing and debriefing procedures, in addition to any training or practice tasks participants might need to undertake. For questionnaire and online based studies, the duration should be an estimate of how long the study would take to complete so participants can plan their time accordingly.
SONA Credits	For each 20 minutes of participation, you can award 1 credit. The number entered into this box should tally with the Duration of your study – thus, if you specify your study is 40 minutes in duration, you should award 2 SONA credits and so on. The number of SONA Credits is monitored by the system and any discrepancies between the duration of a study and the number of SONA Credits on offer may lead to studies being suspended from the system and SONA Credits being revoked.
Preparation	Optional. Only fill this in if you need participants to do/not do something before they attend your study. For example, in EEG studies, participants are usually asked to wash and dry their hair before participating.
Principal Investigator	The Principal Investigator is your project supervisor. Select your supervisor from the drop-down list.
PDEC Approval Code	Do not enter anything in this box
Approved?	When you are creating a study, this field will say **Currently not approved. Approval is required.** You cannot change this field. Once you have submitted your study, the Administrator will check it and will approve it within 48 hours.
Active Study	Select **YES** to make your study active as soon as it received SONA approval.

Advanced Settings

Many of the settings here will not be applicable to your study. However, the options marked with a **star symbol** should be considered.

Advanced Settings	
Field	**Explanation**
Pre-Requisites	Sometimes, before participants can take part in one study they need to have completed a different study. If that is the case with your study, select the pre-requisite studies here. This is an advanced option and it is unlikely that final year project students will need to use this. Your supervisor will guide you if you think you need to use this feature.
Disqualifiers	Sometimes, for a participant to take part in your study they must **NOT** have taken part in a separate study. If that is the case, select the disqualifying studies here.

	This is an advanced option and it is unlikely that final year project students will need to use this. Your supervisor will guide you if you think you need to use this feature.
Study URL	If you are collecting data using an online system, you can paste the website here. For example, you may use BOS or SurveyMonkey to collect questionnaire data.
Should the Researcher receive an e-mail notification when a participant signs up or cancels? ⭐	We <u>strongly recommend</u> that you select **Yes – for sign-ups and cancellations**. If you do this, the system will e-mail you to let you know when someone has signed up for your study and when they will be attending. This allows you to ensure you have booked any necessary labs or equipment you need to conduct your study. It also means that if a participant cancels, you will get 24 hours notice and won't waste your time turning up to test someone who is not going to show up.
Automatic Credit Granting ⭐	If no action is taken by the researcher, should the system automatically grant credits to participants after the timeslot is 6 hours old? If you select **Yes**, SONA will automatically allocate the required number of SONA Credits to the participant within 24 hours of participation. Selecting **YES** is the easiest option. If you select **No**, you will have to manually grant HP credits for each participant. Please note: if you are using an online survey tool, you may need to manually grant HP credits for your participants.
Shared Comments	Optional. There is no need to complete this field.
Research Alternative	You cannot change this field.

Adding an Online External Study

Choose this option if you are using an external survey web resource (e.g. SurveyMonkey, BOS etc.) to collect data. You should create your online survey or questionnaire before you add your study to SONA.

When completing the Basic Study Information, the process is identical to that of the Standard Study outlined above.

When selecting an Online External Study, there are some additional Advanced Settings that need consideration. These settings are indicated with a star.

Advanced Settings	
Field	**Explanation**
Pre-Requisites	Sometimes, before participants can take part in one study they need to have completed a different study. If that is the case with your study, select the pre-requisite studies here. This is an advanced option and it is unlikely that final year project students will need to use this. Your supervisor will guide you if you think you need to use this feature.

Disqualifiers	Sometimes, for a participant to take part in your study they must **NOT** have taken part in a separate study. If that is the case, select the disqualifying studies here. This is an advanced option and it is unlikely that final year project students will need to use this. Your supervisor will guide you if you think you need to use this feature.
Is this a web-based study?	This field will say **Yes – study is administered outside the system**. You cannot change this field.
Should survey participants be identified only by a random, unique ID code? ⭐	The default is **NO**. This is because you will need to match up who completed on SONA with the responses from your external study resource. Otherwise, you will not be able to know who should receive credit. When setting up your external online study, ensure you collect participants' Aber ID.
Study URL ⭐	You should paste the link to the external study resource here. For example, you may use BOS or SurveyMonkey to collect questionnaire data.
Study URL Display ⭐	After participants complete this study, can they still access the study URL> They will not be given the URL until they have signed up for the study. This setting controls if they can still see it after they have participated.
Should the Researcher receive an e-mail notification when a participant signs up or cancels? ⭐	We strongly recommend that you select **Yes – for sign-ups and cancellations**. If you do this, the system will e-mail you to let you know when someone has signed up for your study and when they will be attending. This allows you to ensure you have booked any necessary labs or equipment you need to conduct your study. It also means that if a participant cancels, you will get 24 hours notice and won't waste your time turning up to test someone who is not going to show up.
Automatic Credit Granting ⭐	If no action is taken by the researcher, should the system automatically grant credits to participants after the timeslot is 6 hours old? If you select **Yes**, SONA will automatically allocate the required number of SONA Credits to the participant within 24 hours of participation. Selecting **YES** is the easiest option. If you select **No**, you will have to manually grant credits for each participant. Please note: if you are using an online survey tool, you may need to manually grant credits for your participants.
Shared Comments	Optional. There is no need to complete this field.
Research Alternative	You cannot change this field.

Updating a study

You can update your studies at any time. To do this, go to the Home Screen and click **My Studies** from the top toolbar. Click on the study you want to update and choose **Change Study** from the Study Menu.

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 study so that it is visible to participants.

If the study's name, abstract, description, eligibility requirements, duration, SONA Credits or preparation value is changed, the study will need to be re-approved by the administrator before it is visible to participants.

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

Basic Study Information

Study Name	The Relationship between parenting style and academic success - an online study
Brief Abstract	asdfasfdasdfasdf
Detailed Description	asdf asd fasdf asdf asdf a
Eligibility Requirements	None
Duration	20 Minutes
SONA Credits (SONA Credits must be evenly divisible by 1)	1 (Only the administrator can change the SONA Credits value after a study has started.)
Preparation (Up to 255 characters, optional)	
Researcher	Rahman, Rachel
Principal Investigator	Wright, Victoria

Please note that you cannot change the number of credits once participants have signed up for your study.

Deleting a Study

You can delete your own studies if you so wish. You can only delete studies for which there are no pending sign-ups and no outstanding SONA Credits waiting to be assigned. If you need to delete a study that has pending sign-ups, you will need to contact the System Administrator.

To delete your study, click **My Studies** from the Home Screen and click **Delete Study** on the Study Menu. You will then be asked to confirm the deletion – press **Yes, Delete** to delete the study.

Participant Study View

If you would like to view your study exactly how it appears to participants, then you should use the Participant Study View option. To do this, click **My Studies** and select the study you want to view. From the Study Menu, choose **Participant Study View**.

Working with timeslots

Timeslots are the available times when a participant may sign-up to participate in a study. Timeslots allow you to specify a date, time, and location of the study. If you are doing an online study, you will probably not need to book a lab.

To ensure everyone has opportunity to use the labs, you should not block book labs for extended periods. If you need to book the labs for extended periods you should discuss this with your supervisor who will advise you as to how to proceed. SONA timeslots will be monitored and anyone found to be block book labs and then not using the timeslots may have their access to SONA limited.

Creating timeslots for an Online External Study

If you are setting up an Online External Study, as participants do not physically need to meet with you at a specified time in a specific place, you simply create **ONE** timeslot, the total number of participants you want to recruit in total and the **latest** date by which users can take part in your study. There is no need to create multiple timeslots for all your online participants – this would be both time-consuming and confusing!

To add a timeslot for an online external study, click **My Studies** and select the study for which you would like to add a timeslot. Then click **Study Menu** and **View/Administer Timeslots**. Finally, clikc **Add a Timeslot** in the top right of the screen.

Specify the latest time and date by which participants can complete your survey and the maximum number of participants you are looking to complete and click **Add This Timeslot**.

Creating timeslots for a Standard (Non-online) Study

Select the study you would like to add timeslots for. From the Home Screen, click **My Studies** and choose **Timeslots** for the appropriate study.
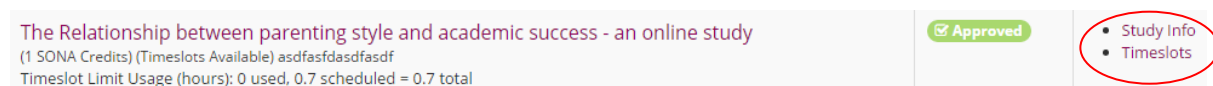
To add a single timeslot, click **Add a Timeslot**. Set the date, time, number of participants (usually 1) and the location of the timeslot. If you select the location from the drop-down list, SONA will let you know if someone already is using that location at that time. If you do not need to meet participants in a Departmental lab (for example, if you are administering a paper questionnaire study), then you can type a location into the box (e.g. lobby of P5).

Creating multiple timeslots

To add multiple timeslots, select **Add Multiple Timeslots**. You can add a specified number of timeslots – for example, if you need 40 participants for your study, you could create 40 timeslots spread across several days. Please ensure that timeslots are set up to occur during business hours (Monday-Friday, 9-5pm).

Add Timeslots : The Relationship between parenting style and academic success - an online study

There are 2 options for adding multiple timeslots at once. You may add a specified number of timeslots, or you may duplicate the timeslot configuration from a specific week. If you duplicate the timeslot configuration from a specific week, the number of participants, locations, and times will be copied over.

With either option, you will have an option to review the information before the timeslot addition is performed. Please choose one of the 2 options below:

Number of Timeslots	1 ▼
Date	Monday, 26 September 2016
Start Time	9:40 ⊙
Free time between slots	0 Minutes
Move timeslots to business hours?	⚪ Yes ⦿ No Timeslots that fall outside normal business hours will be shifted to the next business day.
Business Hours Start	9:00 ⊙
Business Hours End	17:00 ⊙
Number of Participants (Per timeslot)	1
Location	0.51 - Qualitative Lab ▼ ⧉ View Schedule _____ Select a location from the list, or type in your own, but do not do both.

Add

When adding multiple timeslots, you can choose the number of timeslots you would like, the start time and data, the amount of time between each timeslot (to allow you a break if you are testing multiple participants on the same day. When you have input your required settings, click **Add**.

On the next screen, you can confirm your choice of timeslots. If you are happy with your timeslots, click **Add Selected Timeslots**.

Modifying and deleting timeslots
To modify or delete a timeslot, select the appropriate study from the **My Studies** link then **View/Administer Timeslots** from the Study Menu. The click **Modify**.

To modify the timeslot, make any required changes then click **Update Timeslot**. To delete the timeslot, click **Delete**.

Deleting multiple timeslots

To delete multiple timeslots, click **View/Administer Timeslots** then **Delete Multiple Timeslots** from the menu at the top of the page. Tick the timeslots you want to delete then click **Delete Selected Timeslots**.

You can only delete timeslots for which no participants have signed up.

Manual Sign-Up

Sometimes you may need to manually sign up a participant to take part in your study. This can happen when – for example – a participant wants to sign up at very short notice and there are no timeslots available on SONA. As the system operates a 24 hour pre-study cutoff for sign-ups, participants cannot sign up themselves if they want to participate in the next 24 hours. In this circumstance, you would need to manually sign up the participant yourself.

To manually sign-up a participant, navigate to the required study and ensure there is a suitable timeslot available. If there is no timeslot available, make one (see page 8 on how to create a single timeslot).

From **My Studies**, click **Timeslots** for the study in question, then click **Modify**. Scroll down to **Manual Sign-Up**.

Enter the participants's SONA username or surname. You will then be asked to confirm that you want to sign the participant up for that timeslot. Click **Sign Up** to complete the process.

Manual Cancellation

You can choose to manually cancel a participant. This can happen if you or the participant wish to cancel the appointment.

From **My Studies**, click **Timeslots** for the study in question, then click **Modify**. Find the participant in the list of timeslots and click **✗Cancel** underneath their name.

In the textbox on the following screen, state the reason for the cancellation then click **Yes, perform cancellation**.

Please note – if a participant has signed up for your study and you intend to cancel, you should provide **AT LEAST 24 HOURS NOTICE** that you are cancelling their appointment. Failure to do so may result in your rights to use SONA bring restricted.

Viewing the participant list

To view a list of participants who have signed up for your study, click **My Studies** from the Home Screen, then **Timeslots** for the study in question, then click **Modify** next to the timeslot of interest.

Granting or Revoking Credit

Once a participant has completed your study, you should promptly indicate that the participant attended to ensure the participant gets their SONA Credits in a timely manner. To do this, click **My Studies** from the Home Screen, then **Timeslots** for the study in question, then click **Modify** next to the timeslot of interest

17

If the participant participated, click the radio button in the column headed **Participated** next to the participant's name. If the participant did not attend, you should indicate why. If they contacted you to cancel the appointment or have rescheduled, you should click **Excused** in the No-show column. If the participant did not show up and did not contact you to cancel or reschedule, you should click **Unexcused** in the **No-show** column. You can add a comment in the Comment box if you so wish (e.g. waited 15 minutes, ppt did not show up'. Then click **Update Sign-Ups.**

NB: SONA will assume that participants attended and participated unless you indicate otherwise. If a participant attends as scheduled credit will automatically be granted by the system within 24 hours. If a participant does not show up, you must indicate them as a No-Show on SONA within 6 hours, or they will receive credit they did not earn.

Emailing Participants

If you need to contact any participants who have signed up for your study you can do so from within SONA. To do this, click **My Studies** from the Home Screen, then **Timeslots** for the study in question, then click **Modify** next to the timeslot of interest. In the bottom right-hand corner, you have the option to **Contact All Participants**. You can also choose to contact participants individually.

Frequently Asked Questions

I am running a web-based study. How will I know when to grant SONA Credits?
You will need to match up those who complete the survey in your chosen web resource (SurveyMonkey, BOS etc.) with those who signed up through SONA. To do this, ensure your online survey collects participants' Aber e-mail ID. You can then check who completed your survey online against those who signed up in SONA using their Aber ID and award SONA Credits accordingly. You can read how to do this on page 11. To get a list of participants who signed up via SONA, read page 11 **Viewing the Participant List**.

What do I do if I have a problem with the system?
If you experience any issues whilst using SONA, please make a note of the problem and what you were doing in the system at the time. You should then contact Matt Wilby, Department Technician and SONA System Administrator (mlw11@aber.ac.uk).

When I create timeslots in SONA, does that mean I have booked that lab/room?
Yes, even before anyone has signed up to the study. Though it is essential you fill a timeslot with a participant if you intend to use the room, otherwise it might be seen as unused by the department and the room entered (interrupting any study) if needed last minute.

You should only book labs/rooms when you know you need them. In particular, you must **NOT** block book labs for extended periods of time as this can prevent others from using the facilities of the Department. It is suggested that you create timeslots in SONA, recruit participants and then book rooms as and when required. The Department has a lot of lab space/testing cubicles so there should always be plenty of capacity for everyone if the system is not abused.

Sign-ups within SONA have a 24 hour cut-off. That means that participants need to sign up at least 24 hours in advance (unless you manually sign-up a participant; see page 17). If you have booked

labs and have no sign-ups in SONA at the 24 hour cutoff point, please cancel your room booking as a courtesy to others who may be waiting to use the lab.

What do I do if I have a participant from outside of the Psychology Department.
Although it is our preference that you try to use Psychology students for your study, sometimes we acknowledge this isn't viable. In this case, you will need to manually signup 'admin' to the timeslot you have agreed with your external participant. This will keep your booking of the room whilst also blocking it off from being bookable by anyone else.