



# SONA-System Manual for Researcher

#### Guide:

How to Create and Manage Your own Study v. 11-02-2023

### **Table of Content**

<ul> <li>General Information</li> </ul>	3
• Log In	6
Creating a new Study	8
Adding Study	8
Study Type	10
<ul> <li>Study Information</li> </ul>	13
Set Credits	17
Study Menu	25
Approval Request	26
<ul><li>Timeslots</li></ul>	28
Information for Researcher	34
Signing up Participants Manually	35
Singing off Participants	38
Granting Credits	41
Closing a Study	44
Further Information	47

#### **General Information**



#### Function of the SONA-System

- Everyone who is interested to participate in scientific psychological studies has the possibility to register in the system. Therefore, the system enables researchers to find interested participants for their experiments.
- In conclusion, the SONA-system represents a communication interface between participants and researchers. It allows researchers to find participants (or better to say: the participants themselves find the studies that are offered in the system), to create timeslots where potential participants can register themselves and to grand credits after successful study participation.

#### **General Information**



#### Function of the SONA-system

#### Attention:

<u>Setting up a study in SONA does not mean that the corresponding lab</u> <u>room has been reserved.</u> For this, please always contact the person responsible for the respective lab! All information concerning laboratory rooms, which you specify in the SONA-system, are only supposed to inform the participants.

 Please make sure you have already reserved a laboratory room before you schedule your SONA-system study.

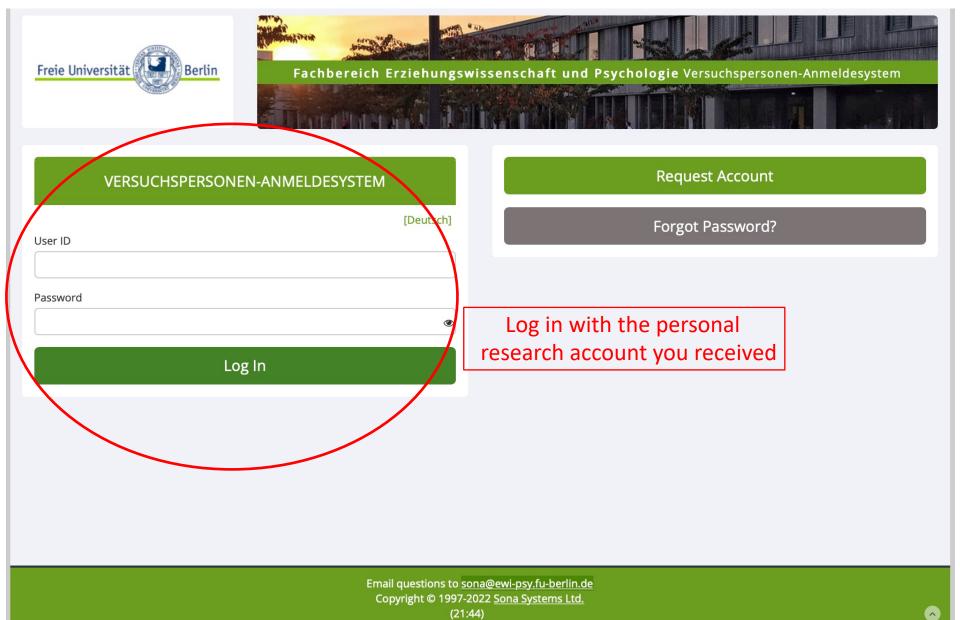
#### General Information



- Access to the SONA-system: https://fu-berlin.sona-systems.com
- To be able to create studies in the SONA-system, you need to request a researcher account first. You can request such an account by sending an E-Mail to sona@ewi-psy.fu-berlin.de briefly describing your concern with the E-Mail subject "Researcher Account Request".
- Within your request please add the following information:
  - your full name
  - your university e-mail-address
  - the division and working group you belong to
  - the name and e-mail address of your supervisor or your working group leader

# Logging In





### Read the Policy and Agree to it









Human Subjects/Privacy Policy

Note: You must read this policy and acknowledge it to continue using the system.

Go to Acknowledgement

#### Important Human Subject and Privacy Policy Notice

This website complies with various privacy and data protection rules and is governed by European Union regulations covering human subject research and data privacy. It complies with the OECD Guidelines on the Protection of Privacy and the European Union Directive on Data Protection. Please read the information below carefully, and contact the person listed in the Contact Information of this notice for more information.

As a person responsible for research studies, you should also review the manuals and guidelines provided to you by your institution or department.

#### Kontaktinformationen

Wenn Sie weitere Fragen zu diesen Regel oder Ihren Rechten und Pflichten haben, wenden Sie sich bitte an: Jana Lüdtke, jana.luedtke@fu-berlin.de, Telephone: 030 838 55193

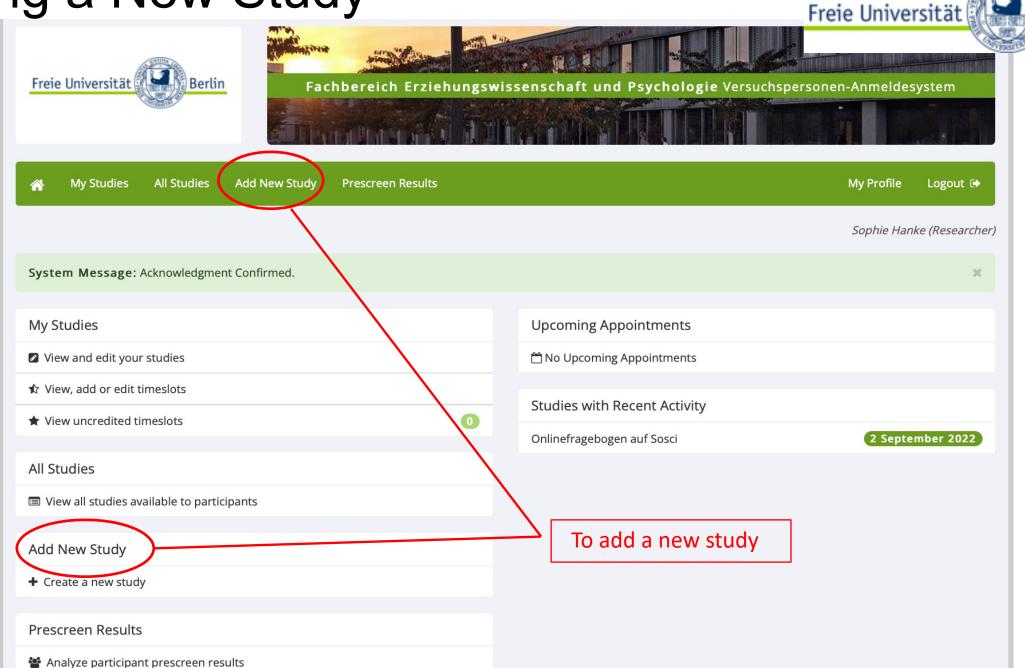
You must acknowledge and agree to these terms before you may use the system. If you have any questions, you should contact the contact person listed above before you acknowledge the agreement.

Have you read the policies above, and do you agree to the terms?



No

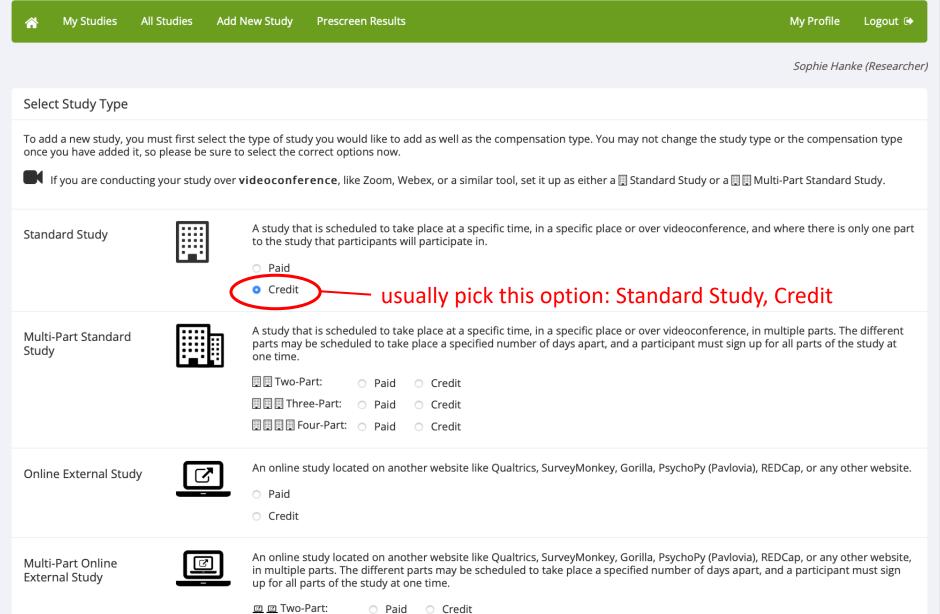
Adding a New Study



Berlin

# Adding a New Study





### Selecting a Study Type



- - Depending on the duration of the study, participants will be granted a number of "Credits" after their participation, those credits can be assigned to different courses and seminars. Some seminars require the participation in studies and therefore a number of credits for a successful completion.
  - ATTENTION! If you want to give some of your participants a payment and others credits, you can do that now within one single Standard-Study for Credits. You will see a pull-down box with credit value for each signup when modifying a specific timeslot. Use this to set different values for the signups as needed. When a participant wants to receive money instead of credit, you can grant 0 credits and note in the comments for the signup that payment was made as well as the amount.

#### Standard-Study Paid

- Only pick this option if you are going to pay every participant for their participation.
- 10 euros per hour are recommended as monetary incentives!

#### Two-Part-Standard Study

- Choose this option if your study consists of two parts.
- Please note: Participants can only sign in for both parts at the same time to prevent that they forget to sign up for the second part. For this reason, it is important to make sure that enough open timeslots exist for both parts of the study. Missing timeslots for the second part of the study will cause that participants cannot sign in for the first part of the study. 10

### Selecting a Study Type



#### Online External Study

- Online Study which was set up outside of the SONA-system.
- Once you indicate to the system that the study is web-based, you will not be able to change it to where it is no longer web-based. However, you can copy the study and convert it to a lab study (if it was an online external study).
- Web-based studies are typically set up so that there is one timeslot, because people
  usually participate right away. That timeslot contains the maximum number of
  participants you would like to participate, and the <u>last</u> date and time when they can
  participate (this is often at the end of the term). It is not recommended that you set
  up multiple timeslots for web-based studies! Though the system will support it, it
  confuses participants.

#### Online Internal Survey Study

• If you are creating an online survey within the system, credit will be granted automatically, immediately after the participant completes the survey.





#### Multi-Part Study

- You may create a multi-part lab study in the system, up to 4 parts.
- When creating such a study, you may specify the day range for each part of the study
   (e.g. 7 to 10 days after the previous part). Participants are required to sign up for all
   parts at the same time, to reduce the chance of forgetting to sign up for all parts.
   Each part of a multi-part study may have a different credit or payment value, and
   duration, but each part must be the same compensation type. However, if the study
   is set up for credits and a participant wants to receive money instead, you can grant
   0 credits and note in the comments for the signup that payment was made as well as
   the amount.

# Adding a New Study



Basic Study Information			
Study Name	22WiSe_Musterstudie	Short title of	the study → See next page
Brief Abstract (Up to 255 characters, optional)	Hier eine kleine Zusammenfas	ssung des Experiments (kann	von TeilnehmerInnen gesehen werden)
Detailed Description (Up to 15,000 characters, optional)	Hier kann eine ausführlichere Zumindest Ort, Incentivierung (kann von TeilnehmerInnen ge	und Dauer des Experiments	nts stehen. sollten hier noch einmal angegeben sein.
Eligibility Requirements	None		
Duration	60 Mir	nutes	
Credits (Credits must be evenly divisible by 1)	2		
Preparation	None		
Researcher	Amashaufer, Sandra Biologische Psychologie, Exper Bührer, Stephanie Eder, Max Gäntgen, Julia Ginter, Johanna Karden, Alexandra Kleber, Janet Kudrna, Alexander	rimentatoren	Mustermann, Max Selected

### Study Information - Naming a Study

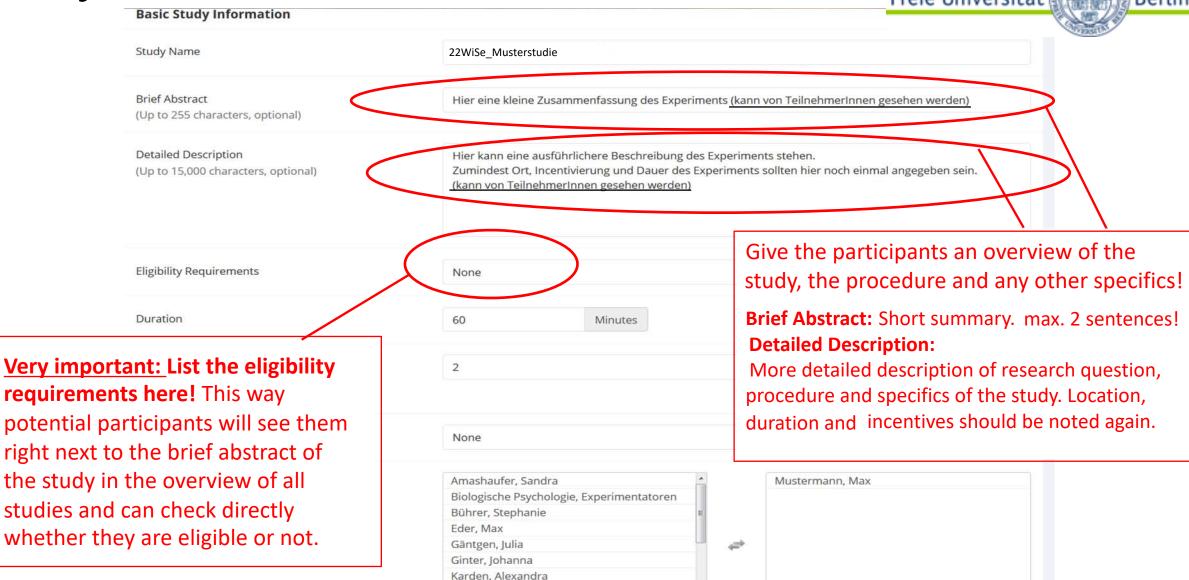


- The name of YOUR study should match a specific form:
  - The name of your study should consist of:
    - <year+semester>\_<freely chosen study name>
- Year + Semester
  - last two numbers of the year followed by semester (e.g.: 14WiSe, 15SoSe, ...)
- Freely chosen study name
  - Choose a name that is not already taken and does not reveal the real purpose of the study in order not to influence your participants beforehand.

#### • **EXAMPLES**:

- 21SoSe\_EEG-Studie
- 22WiSe\_Onlinestudie3





Kleber, Janet Kudrna, Alexander

Available

Selected

Study Information

Basic Study Information



,			1
Study Name			-
Brief Abstract			
Detailed Description			
		Type in the duration of your	/,
ligibility Requirements	None	experiment and how many credits can be earned in total.	
Ouration (Minutes)	60	0,5 credit is granted for experiments which endure up to 30 minutes. For	
/P-Stunden VP-Stunden must be evenly divisible by 0.5)	1	every additional 30 minutes one more 0,5 credit is granted.	
reparation Up to 255 characters, optional)		For paid studies, type in the amount of money each participant will receive.	
desearcher	Blankenbug, Felix Calvano, Claudia Cichy, Radoslaw Martin	→ Read more on the next page	
	Crayen, Claudia Detel, Sibylle	←⇒	

Fiel Michael

#### Study Information – Set Credits



#### • Credits:

- Each participant will be granted "credits" for the participation in an experiment. The amount of granted credits depends on the duration of the experiment.
- The least amount of credits is 0,5. This equals a duration time of 30 minutes.
- If the experiment takes more than 30 minutes, you can grant one more 0,5 credit for every additional 30 minutes-interval. However, if the duration of your experiment is between an interval, please **ROUND UP.** Note, that the system will read a dot as a comma here (type "0.5" instead of "0,5"!)
- One is not allowed to offer more credits than are justified by the length of the study!

#### The duration has to be determined beforehand

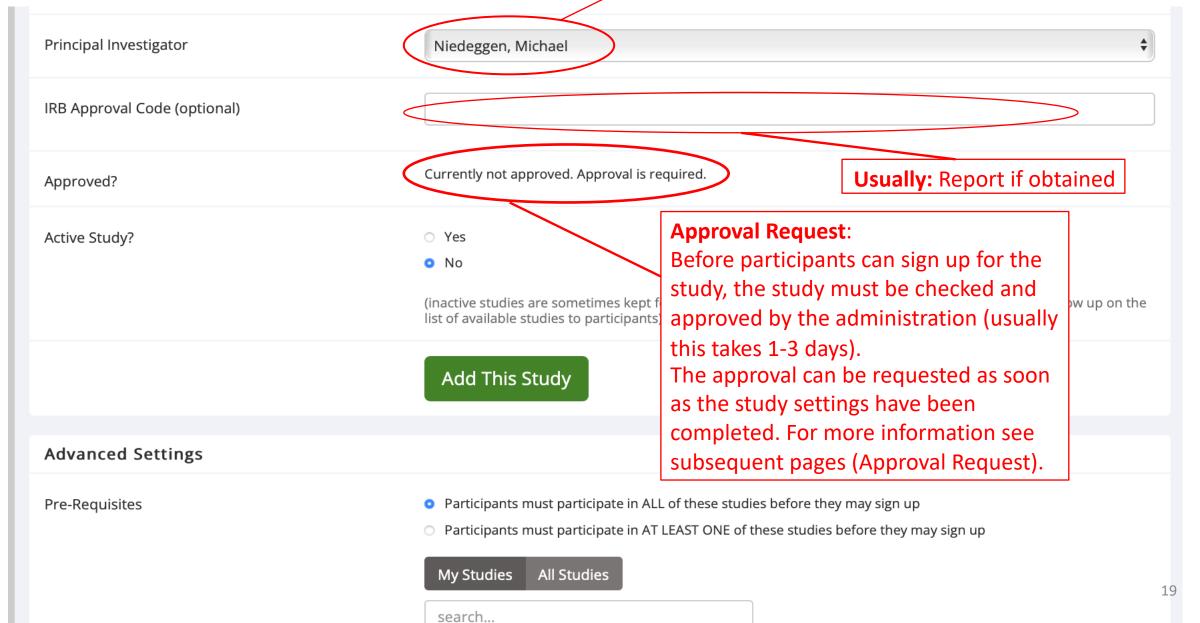
- That means there is a fixed number of credits for the participation in your experiment. This
  number is independent of how much time every single participant actually needed. This is
  why you should estimate the duration of your experiment realistically so that participants do
  not have to stay longer than the time advertised.
- Before you conduct your study, you should test how long it takes!



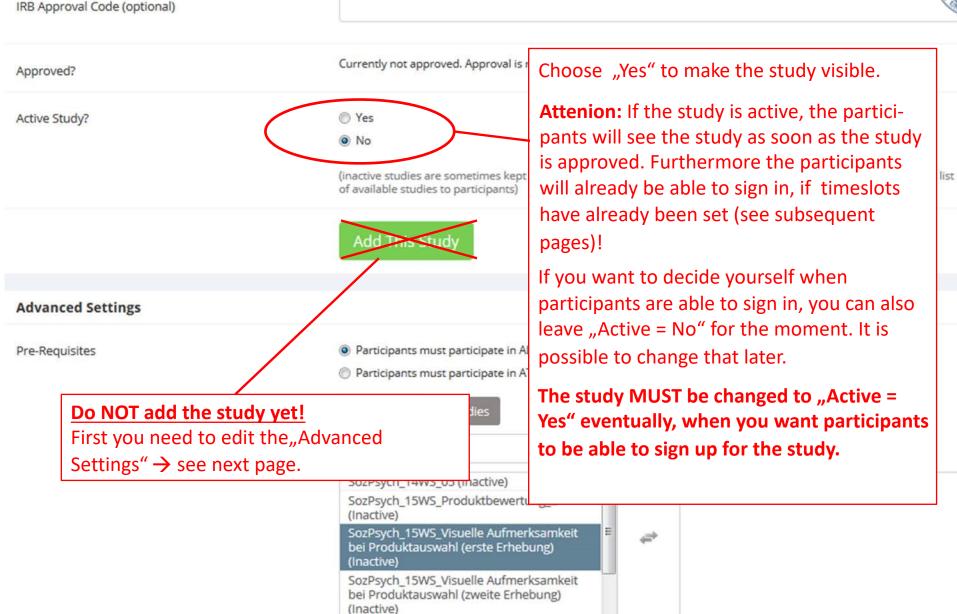
Basic Study Information	
Study Name	
Brief Abstract	
Detailed Description	
Eligibility Requirements	None
Duration (Minutes)	60
VP-Stunden (VP-Stunden must be evenly divisible by 0.5)	If there are additional researchers, click on the names to transfer them
Preparation (Up to 255 characters, optional)	from the left to the right field.
Researcher	Blankenbug, Felix Calvano, Claudia Cichy, Radoslaw Martin Crayen, Claudia Detel, Sibylle

Choose here the head of your department/ project! In case you shouldn't be able to find the right name, contact: sona@ewi-psy.fu-berlin.de





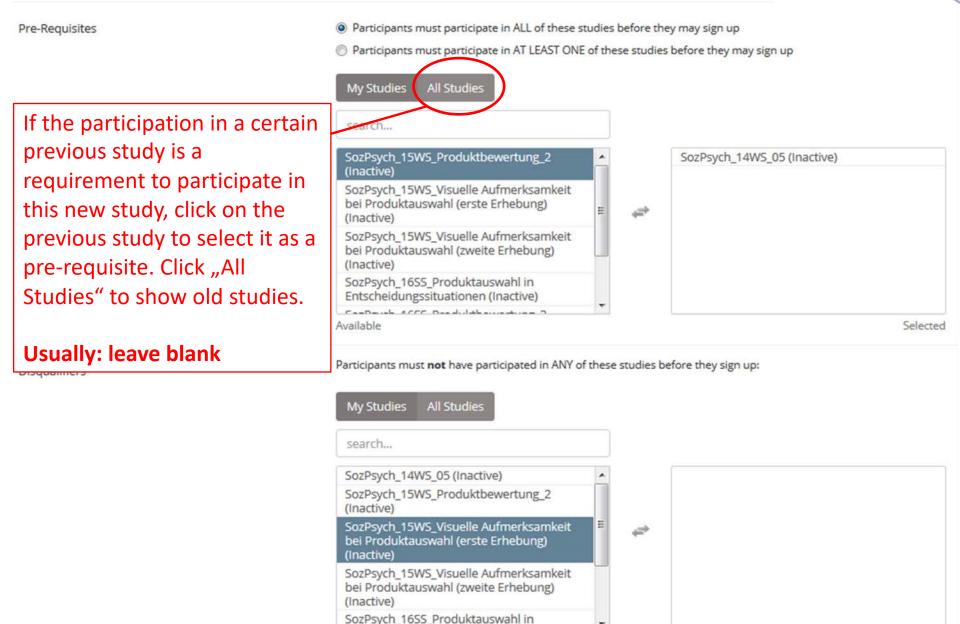




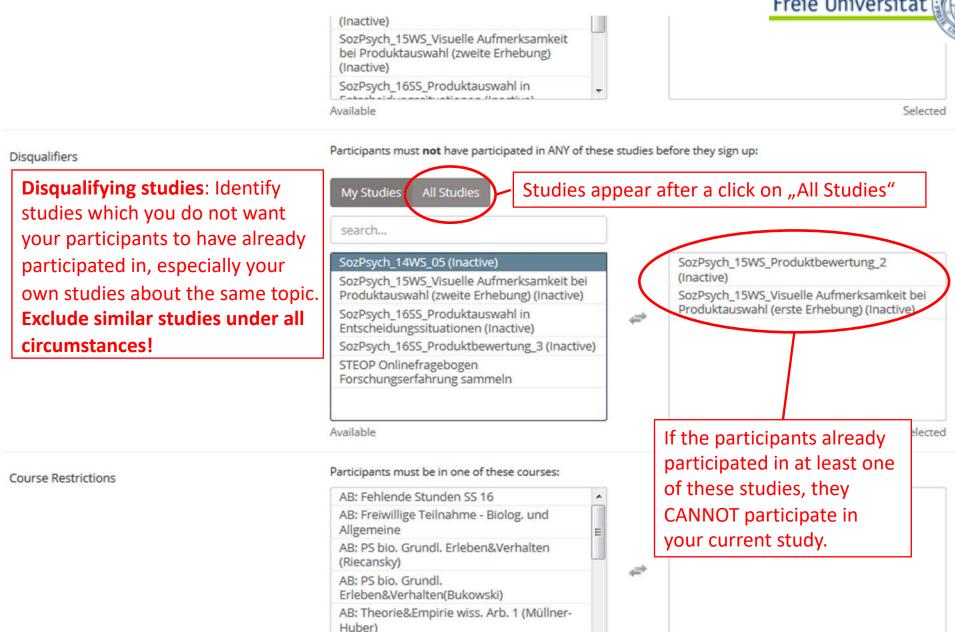
SozPsych 16SS Produktauswahl in

**Advanced Settings** 



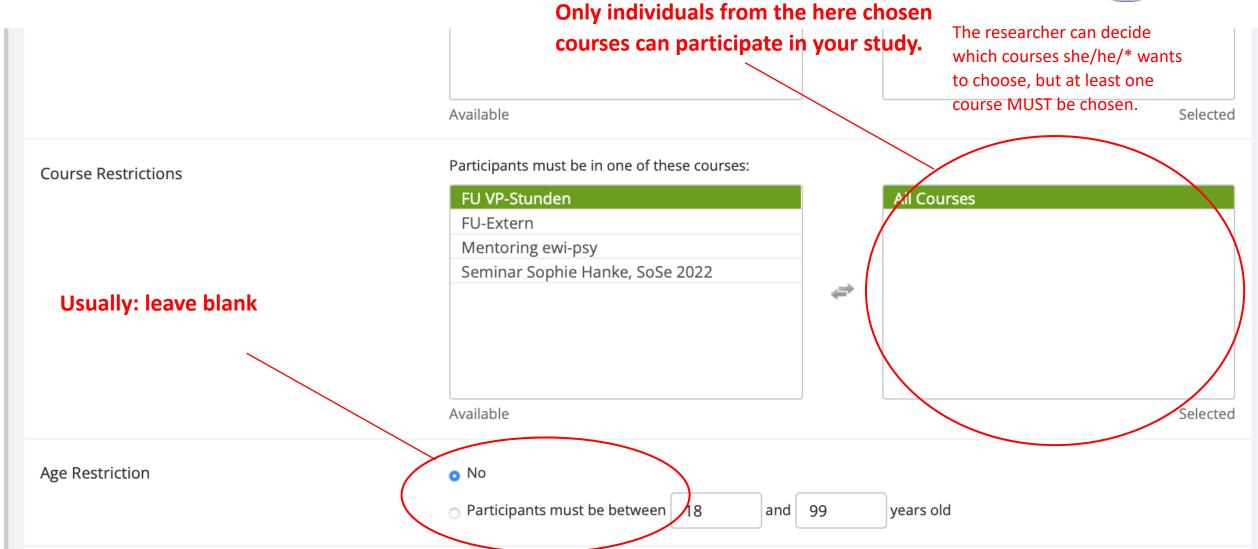






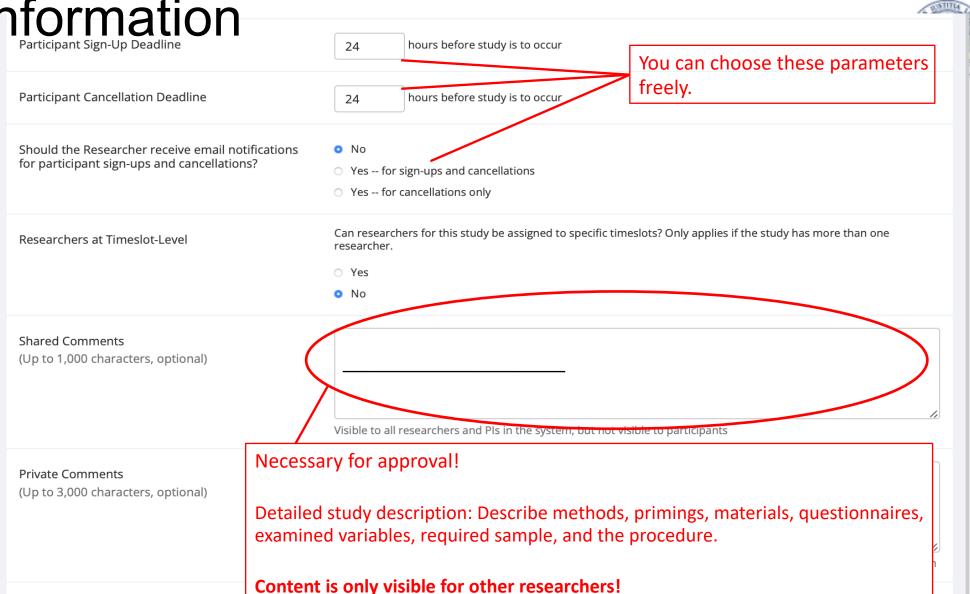
AB: VU Forschungsansätze Kogn. &





Study Information
Participant Sign-Up Deadline

Research Alternative



Add This Study

Finally: Add study

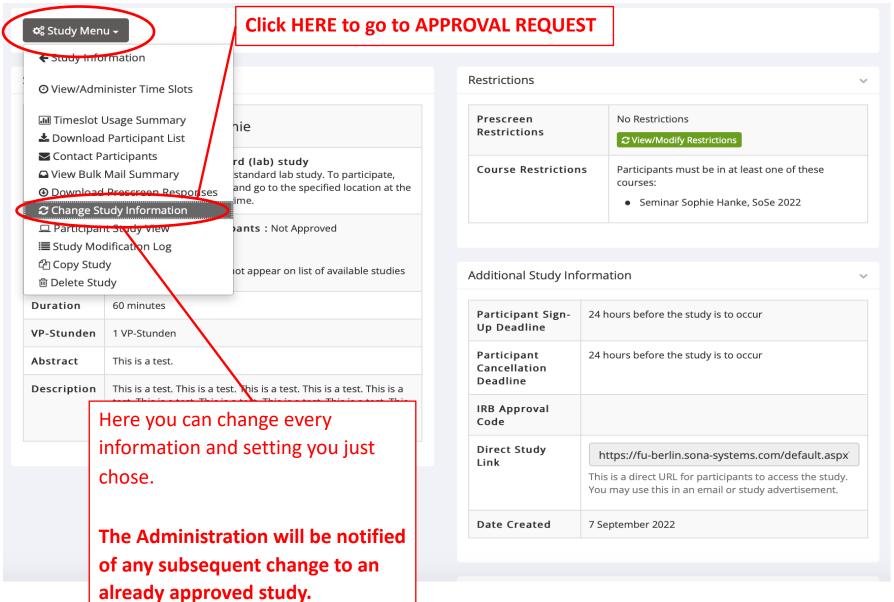
Necessary for the documentation and comprehensibility at a later juncture.

Berlin

#### Study Menu



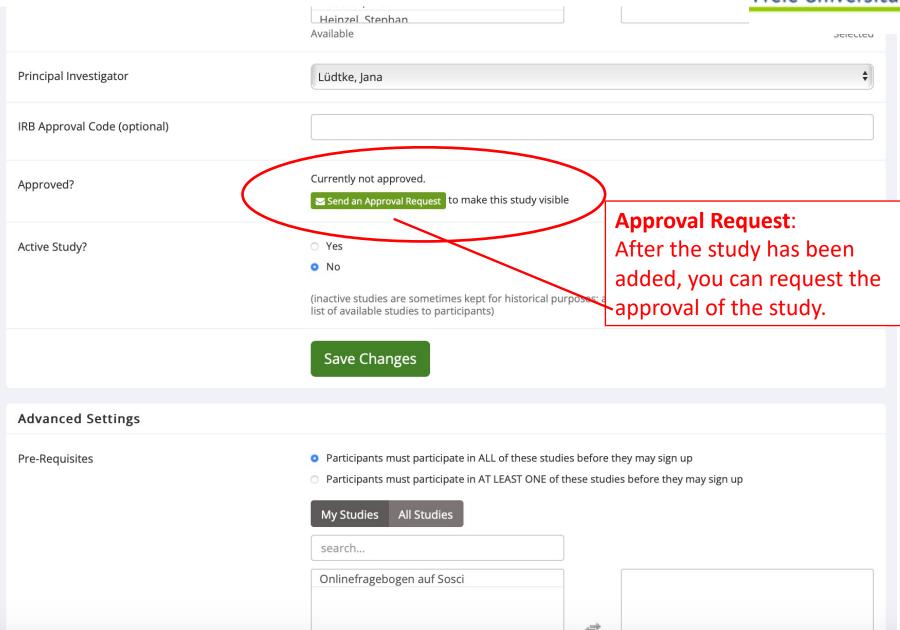
Now your study has been added.



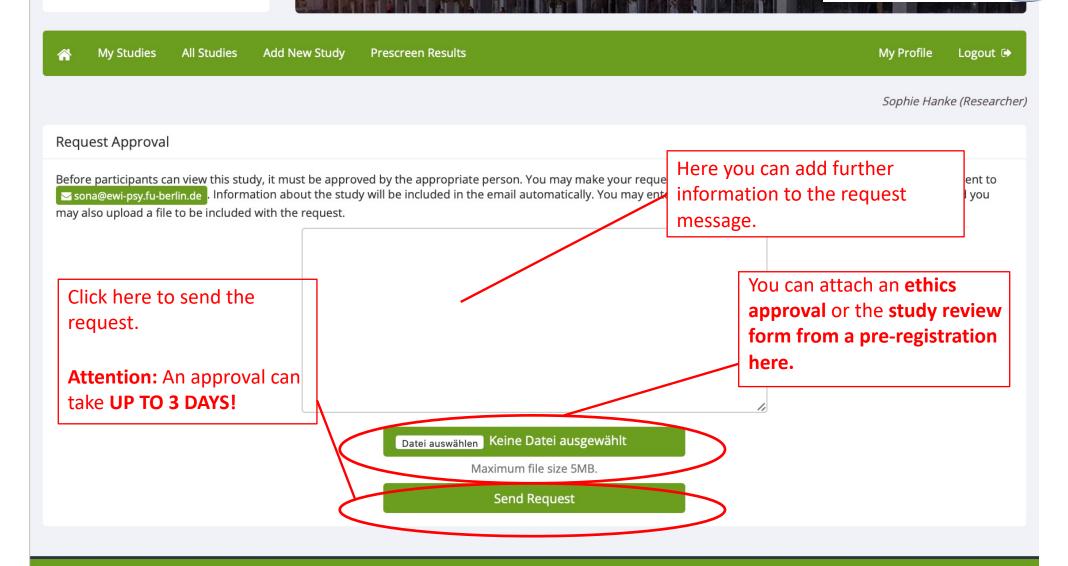
### Study Approval



scroll down until you see ...











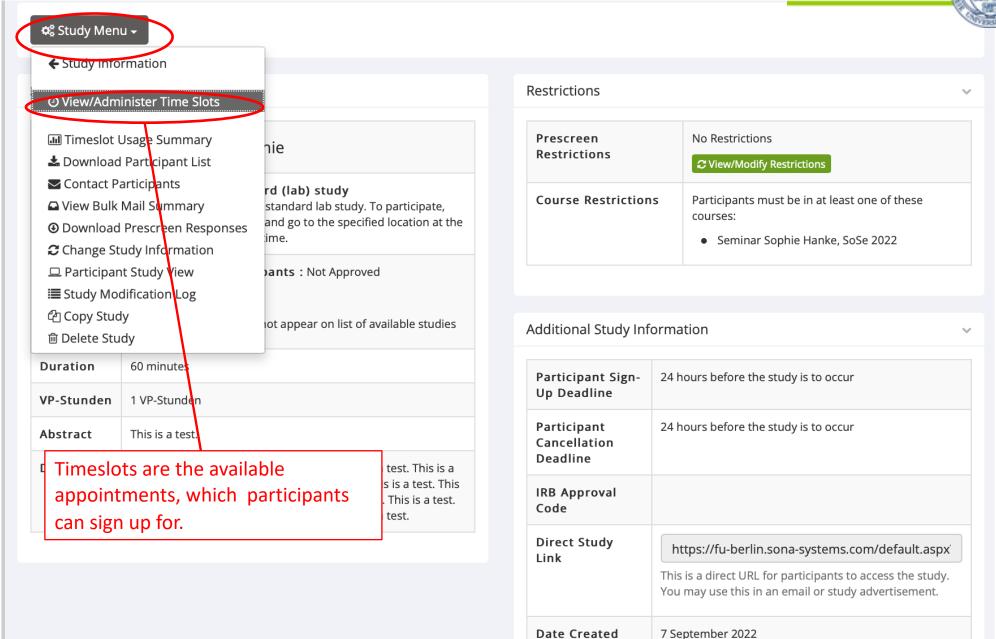
• To participate in a study the participants sign up for an appointment. These appointments are called "timeslots" in the SONA-system. How you can create these will be shown on the following pages...

#### • ATTENTION:

- Do not create more timeslots than participants are needed. If timeslots remain unused, you can create new timeslots.
- If you create more timeslots than necessary, more participants than needed can sign in. As a consequence these participants are no longer available for other studies, although you don't really need them, which would be a pity.

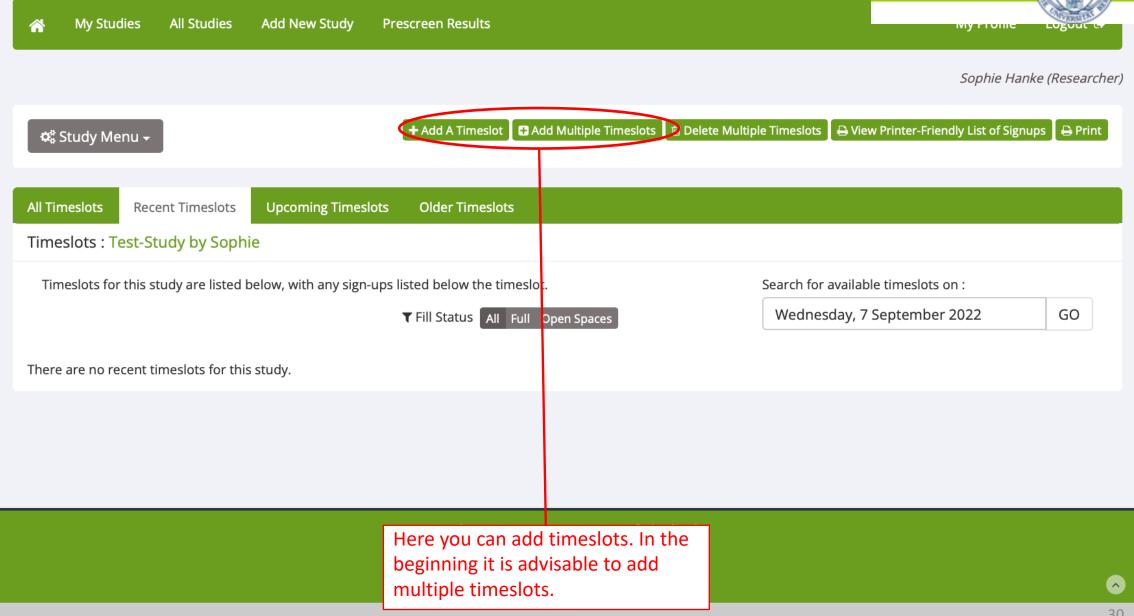
#### **Timeslots**





#### **Timeslots**

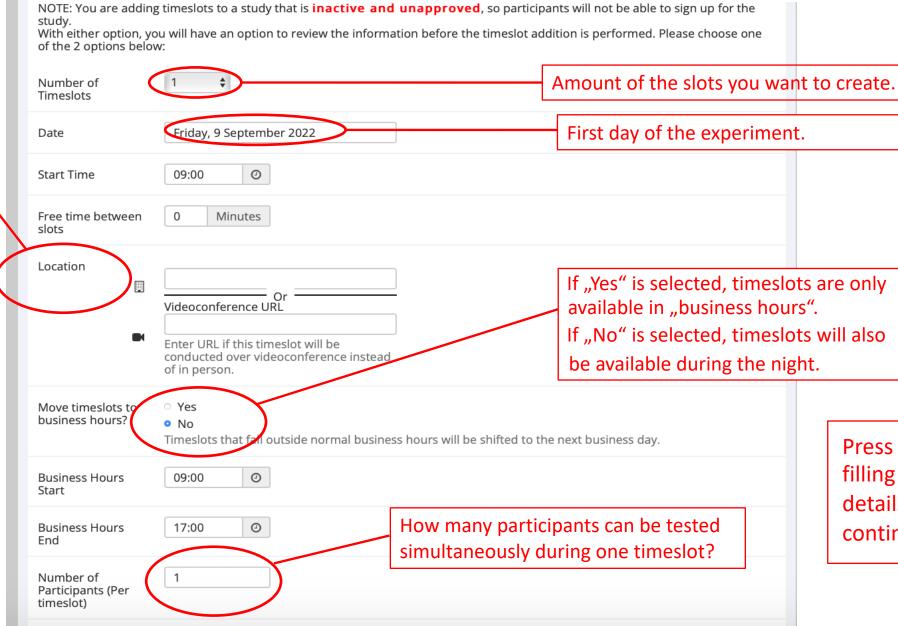




Add multiple Test Study by Sophis Test Study by Sop participants, locations, and times will be copied over.

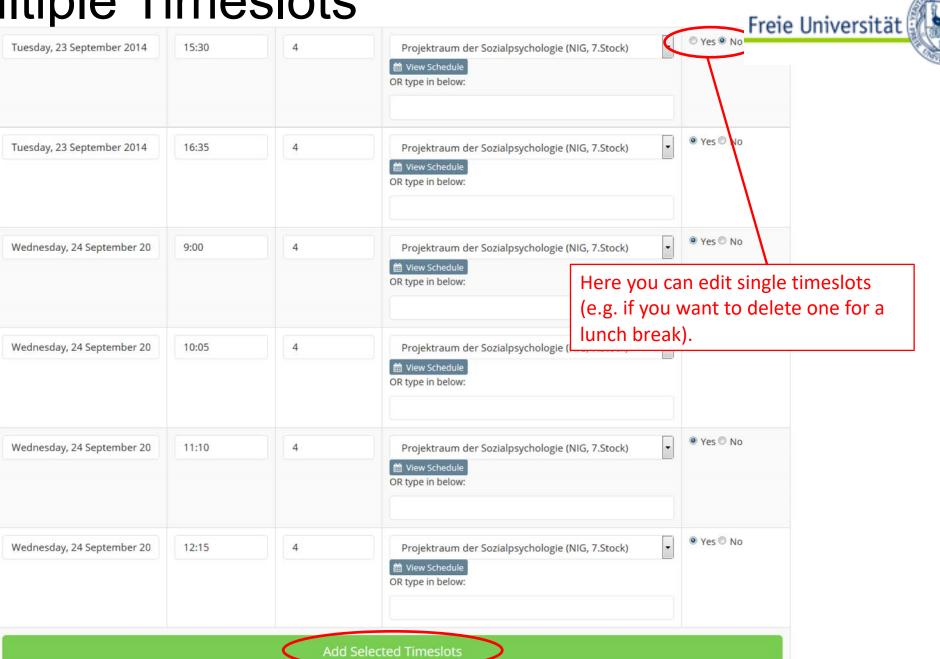
Berlin

Where does the study take place?



Press ADD, after filling in all the details, to continue...

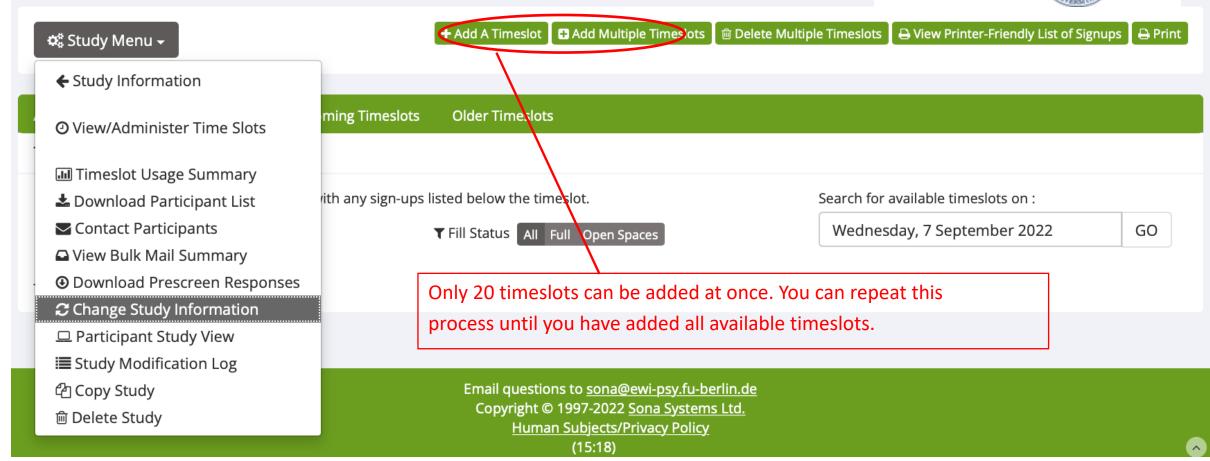
Add multiple Timeslots



32

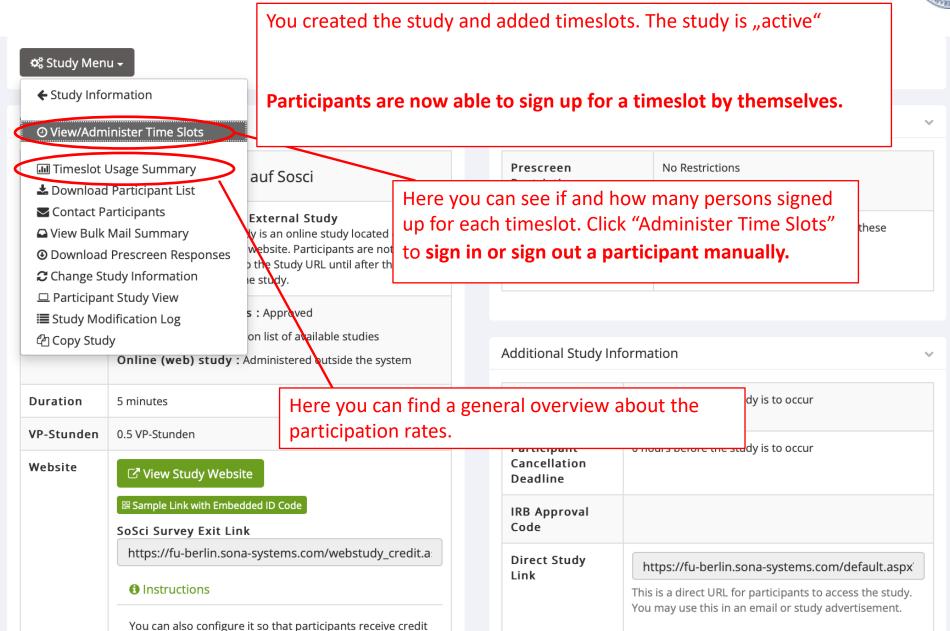
#### Add multiple Timeslots





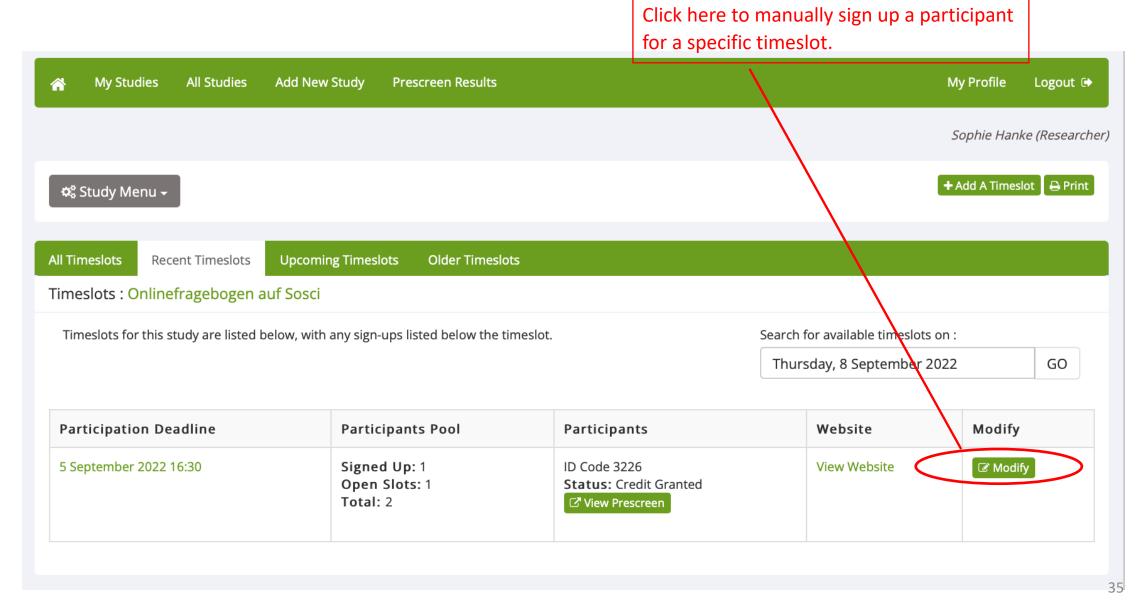
#### Information for Researchers





### Signing up Participants Manually





# Signing up Participants Manually



Final Participation Time 16:30

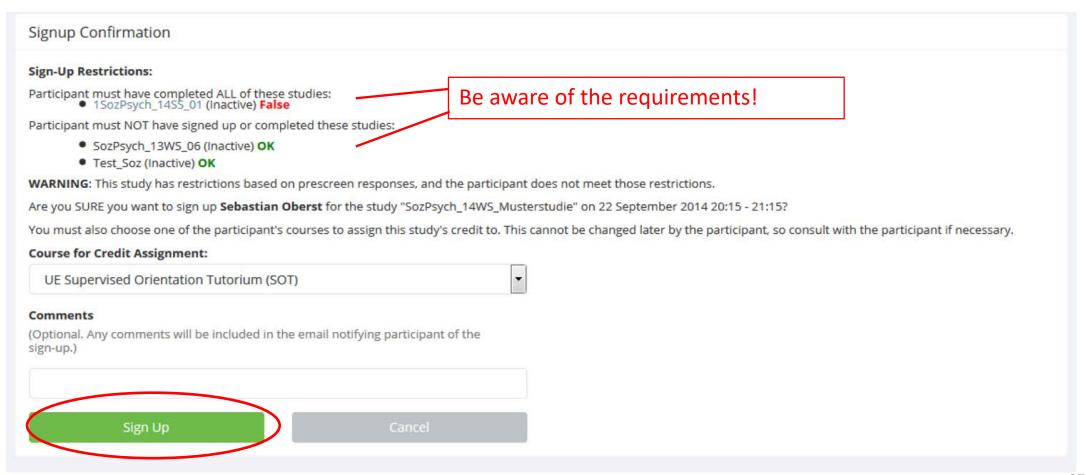
**Update Timeslot** 

All Sign-Ups	Uncredited Sign-Ups			
for some reaso		p, you can click the Canc		ould like to grant or revoke credit, simply choose the desired option next to each participant. If the sign-up you would like to cancel. A sign-up must be in "No Action Taken" status before it can
(1 Participa	nt) 1 available space			
Name		Participated	No-Sh	Here you can enter a participant's ID
ID Code: 322 ≣ View Preso		•	O Une	Here you can enter a participant's ID Code manually. <b>Attention</b> : Because of privacy concerns, there is no other way
🗷 Update S	Sign-Ups			for you to find out what a person's ID  Code is than to ask them directly.
Manual Sign	ı-Up			★ Batch Credit Grant
You may sign u	up a specific participant for thi	s timeslot, using the feat	cure below. Yo	ou may also sign up and immediately credit participants in bulk for this timeslot, using Batch
Username N	Ոanual Sign-Up։			ID Code Manual Sign-Up:
Enter Use				Enter Identity Code  Sign Up

should you experience troubles during this step pls contact the administrators via sona@ewi-psy.fuberlin.de

### Signing up Participants Manually





# Signing off Participants Manually



Timeslots : SozPsych_14V	VS_Mus	terstudie				
Timeslots for this study are listed	below, w	ith any sign-ups listed be	elow the timeslot.			
View timeslots on:						
	GO					

Date	Participants Pool	Participants	Location	Modify
Monday, 22 September 2014 19:15 - 20:15	Signed Up: 2 Open Slots: 2 Total: 4	Ruben Maué Status: Awaiting Action	Projektraum der Sozialpsychologie (NIG, 7.Stock)	<b>☑</b> Modify
		Bernhard Oberfichtner Status: Awaiting Action		
Monday, 22 September 2014 20:15 - 21:15	Signed Up: 1 Open Slots: 3 Total: 4	Sebastian Oberst Status: Awaiting Action	Projektraum der Sozialpsychologie (NIG, 7.Stock)	<b>②</b> Modify
Monday, 22 September 2014 21:15 - 22:15	Signed Up: 0 Open Slots: 4 Total: 4		Projektraum der Sozialpsychologie (NIG, 7.Stock)	<b>⊘</b> Modify
Monday, 22 September 2014 22:15 - 23:15	Signed Up: 0 Open Slots: 4 Total: 4		Projektraum der Sozialpsychologie (NIG, 7.Stock)	<b>☑</b> Modify
Monday, 22 September 2014 23:15 - 0:15	Signed Up: 0 Open Slots: 4 Total: 4		Projektraum der Sozialpsychologie (NIG, 7.Stock)	<b>⊘</b> Modify
Tuesday, 23 September 2014 0:15 - 1:15	Signed Up: 0 Open Slots: 4 Total: 4		Projektraum der Sozialpsychologie (NIG, 7.Stock)	☑ Modify

### Signing off Participants Manually

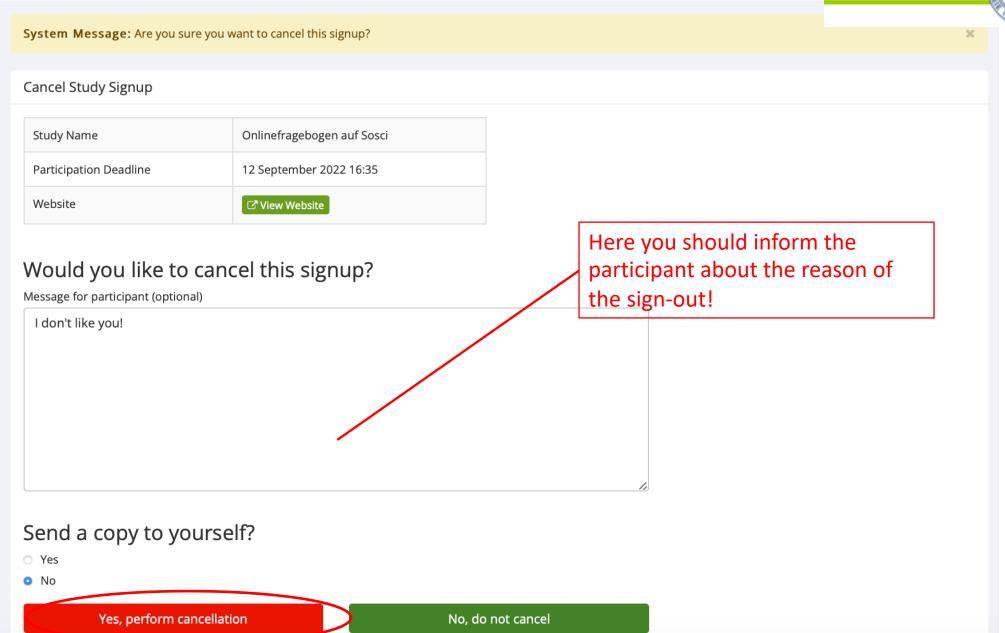


You can also contact participants here individually; in case you need to communicate with them before the appointment.

Final Participation Time	16:35				- Palasto
Time	Click here to d	elete the	Jpdate Timeslot		
	participant fro	m the slot.			
All Sign-Ups Uncredite	d Sign-Ups				
for some reason you need	to cancel a sign-up, you can dill be visible to participants.	for this timeslot. If you lick the Cancel link next	would like to grant or r to the sign-up you wou	evoke credit, simply choose t ld like to cancel. A sign-up m	he desired option next to each participant. If ust be in "No Action Taken" status before it can
Name		Participated	No-Show	No Action Taken	Comments
ID Code: 32 <del>08</del>		0	<ul> <li>Unexcused</li> </ul>	•	
<b>■ View Prescreen Co</b>	ntact 🕻 🗴 Cancel		O Excused		
<b>☎</b> Update Sign-Ups				<b></b> Contact All P	articipants
Manual Sign-Up					★ Batch Credit Grant
You may sign up a specific Credit Grant.	participant for this timeslot, ι	using the feature below.	You may also sign up a	nd immediately credit partici	ipants in bulk for this timeslot, using Batch
Username Manual Sign-	Up:		ID Code M	anual Sign-Up:	
Enter User ID				entity Code	
Sign Up <b>⊙</b>			Sign Up	v	39

# Signing off Participants





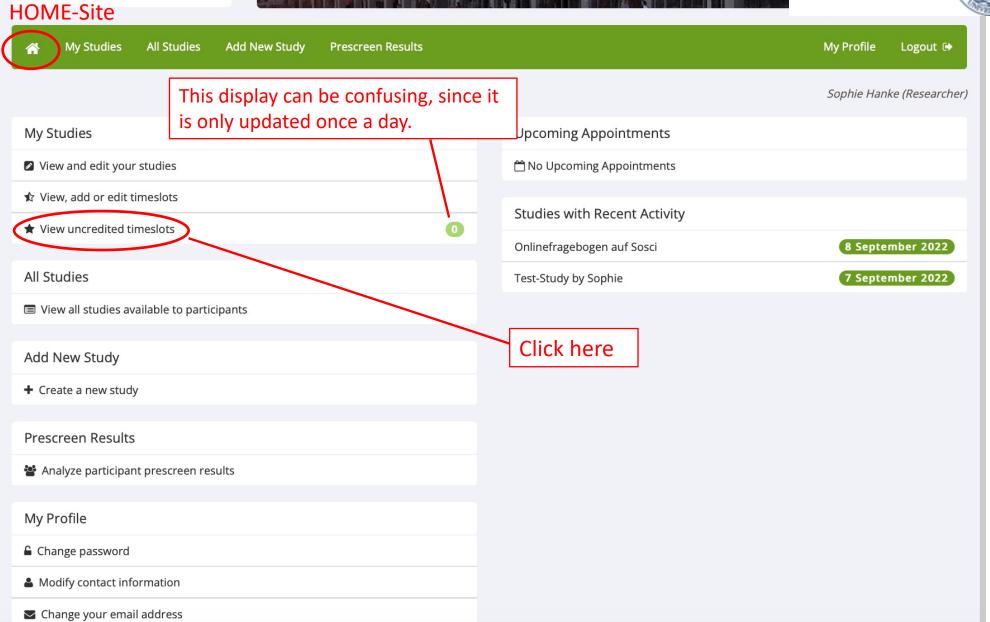


#### **Granting Credits**

- After participation the researcher has to grant the participant the promised credits. This should be done right after the experiment or until the end of that day at latest! If you should ever forget to do so, you will receive an E-Mail reminding you of your duty, daily. This is very annoying, so do yourself a favor and grant the credits right away.
- Individuals that excused themselves (e.g. via e-mail) will not receive credits but they will not be sanctioned any further ("excused no-show").
- Individuals that neither showed up nor excused themselves will be noted in the system ("unexcused no-show"). They will be sanctioned, because you can state as a requirement for your study that you only want people with no or not more than one "unexcused no-show", so those people see less studies in general. That should keep the students motivated to not get any "unexcused no-show" entry at all.

**Granting Credits** 





### **Granting Credits**



#### **Uncredited Timeslots**

Listed below are uncredited timeslots for your studies. The list includes all uncredited timeslots in the past, along with all uncredited timeslots for online external studies.

If you would like to mark all participants as having participated, you may use the <a href="Wark all 'Participated" option.">Wark all 'Participated</a> option.

You may click on the study name to view more information about the study, or click on the date to go to that specific timeslot. If you would like to do a simple credit grant or no-show (no special comments), you may do so below by checking the appropriate checkbox next to each signup for which you would like to grant credit. For other options, like including comments, click on the timeslot date to go directly to the timeslot.

Past and Online

All

**♦** Sort by: Study Name Timeslot Date

Study	Researcher	Date	Participant	Action
Onlinefragebogen auf Sosci	ALL	Online study ending 12 September 2022 16:35	ID Code 3208	<ul><li>No Action Taken</li><li>Grant Credit</li><li>Unexcused No-Show</li><li>Excused No-Show</li></ul>
Total number of uncredited timeslot Total number of VP-Stunden: 0.5	s: 1			Mark all 'Participated'



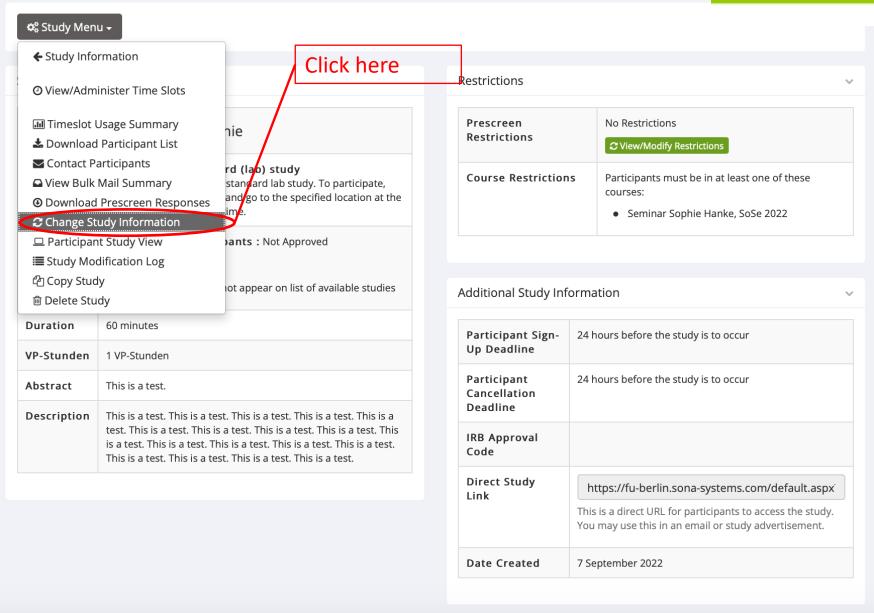




- After the study has been conducted successfully it needs to be archived!
- This is important for the maintenance of the system and to keep everything organized.
- From time to time the administration of the SONA-system will archive old studies that are already online for a very long time and don't seem to be used anymore. If you realize, your study has been closed although you still need to conduct a survey, you can again request an approval of your study.
- Please also **inform the administrators** of the SONA-system via E-Mail, if you are **leaving the university** and your **researcher account can be deleted**!
- How you can deactivate and close your own study, will be shown on the following pages...

#### Closing a Study





# Closing a Study



	Available	Selected
Principal Investigator	Lüdtke, Jana	\$
IRB Approval Code (optional)		
Approved?	Currently not approved.  Send an Approval Request to make this study visible Select "Active Study" → "No" and click	
Active Study?	"Save Changes" to archive the study!  No  (inactive studies are sometimes kept for historical purposes; a study must be active and approved to shor list of available studies to participants)	ow up on the
	Save Changes	



#### **Further Information**

- This manual explains to you the most important steps on how to create and manage a study in the SONA-system and how to invite participants. We thank you for taking the time to read it thoroughly and wish you all the best with your research.
- You can also have a look at the official Master Documentation, which comprehensively describes all possible procedures for all possible roles (Researcher, Student, PI, Administrator) → <a href="https://www.ewi-psy.fu-berlin.de/service/sona/Sona Master Documentation Feb2022.pdf">https://www.ewi-psy.fu-berlin.de/service/sona/Sona Master Documentation Feb2022.pdf</a>
- Furthermore, here is an official tutorial video explaining the most important steps again: <a href="https://youtu.be/ec853xfO-a8">https://youtu.be/ec853xfO-a8</a>
- If you have any specific or further questions, please feel free to contact us any time at: <a href="mailto:sona@ewi-psy.fu-berlin.de">sona@ewi-psy.fu-berlin.de</a>