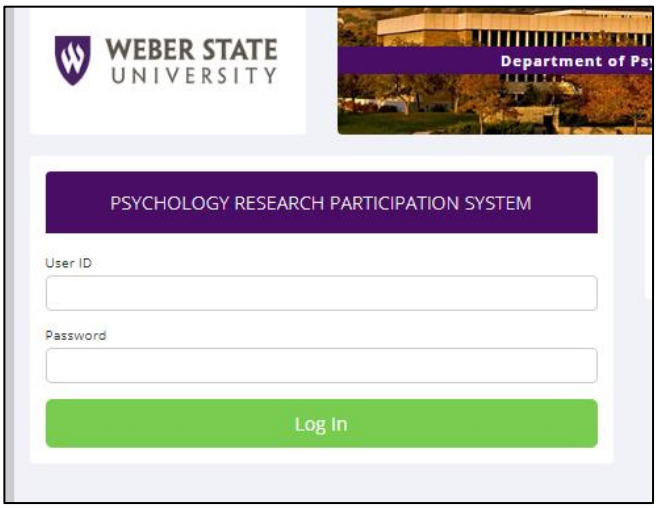
An Online External Study

Contents

**NOTE: For information on additional features, refer to the full Researcher/PI Documentation listed on the Principle Investigators webpage.

An Online External Study - Study Type

An Online External Study is a survey study where the questions are set up in Qualtrics but then attached to a study in Sona Systems. The survey is initially distributed online by Sona Systems, redirected to Qualtrics, and then sent back to Sona in order to assign participation credit. Researchers must carefully set up the redirecting links in both Sona and Qualtrics in order for credit to be assigned correctly.



Creating the Study in Sona Systems

Log in to Your Sona Systems Account

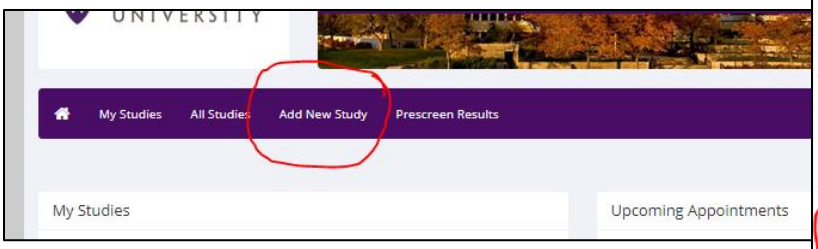
To get started, log in to your Sona Systems Researcher account at https://weberstate.sona-systems.com. (Your instructor will have requested researcher accounts for your class and login info should have been emailed to you. If you have not received an email and you know your instructor has requested accounts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

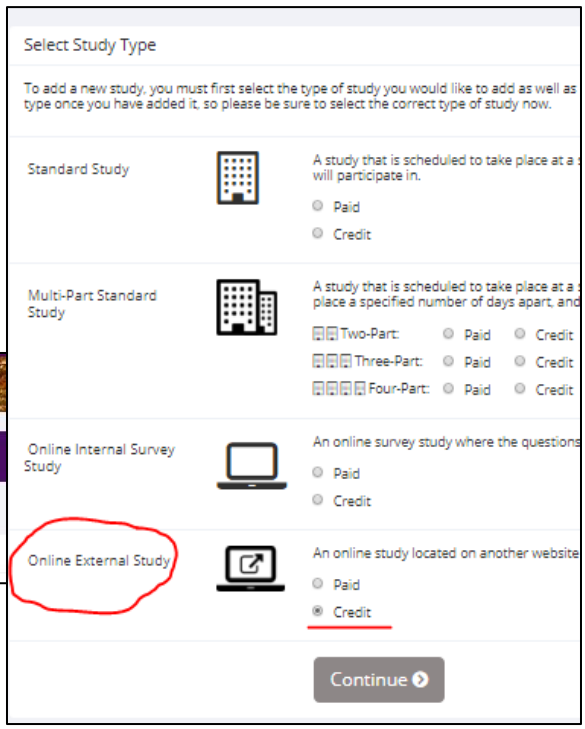
Once in, you'll see your homepage.

Adding a Study

Before you continue, **make sure you have the following information:**

- Your Qualtrics survey has been activated and you have the Anonymous Distribution Link
- Your IRB approval number
- The expiration date for your IRB approval number
- Duration of your 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

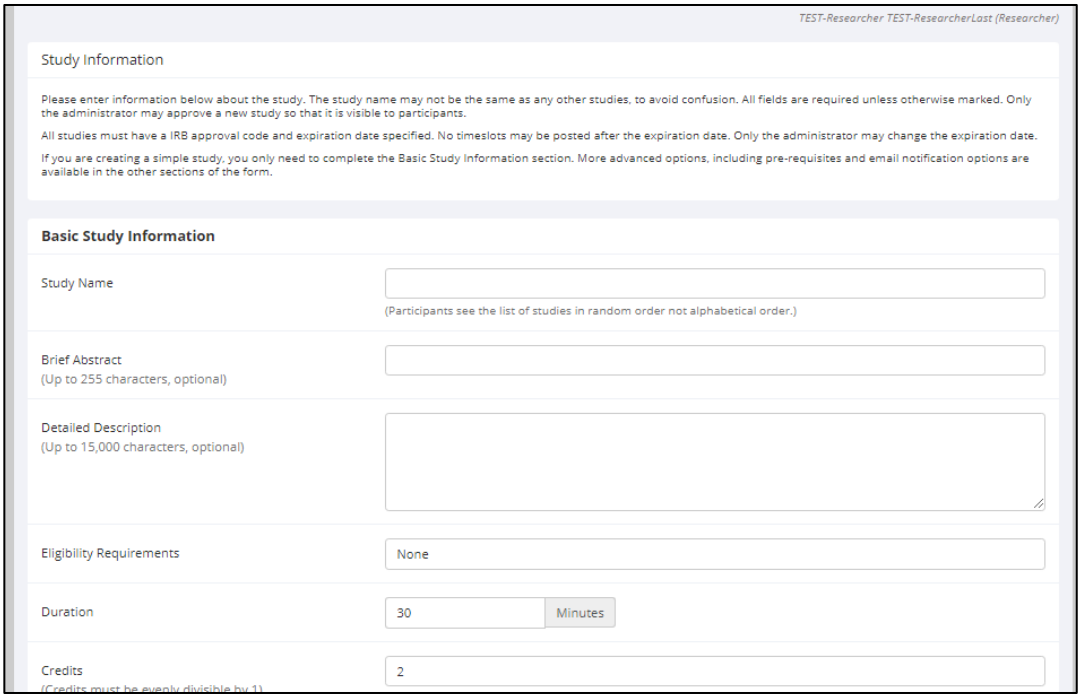




From the homepage, select the tab titled *Add New Study.* The next page will ask you to select study type. Under *Online External Survey Study*, select the credit option and then press continue.

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 External Survey Study). All fields in the Basic Study Information section must be filled out unless otherwise noted.

(Refer to table below.)



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 student research studies are for CREDIT *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 list of studies that participants might sign up for. 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* Active, then it does not show up to participants on the listing of studies, 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

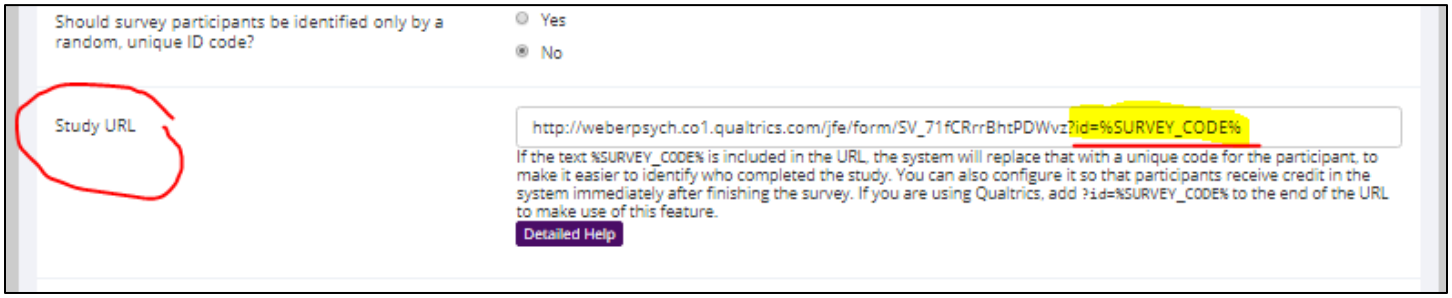
Field	**Explanation**
Pre-Requisites (this feature might be disabled on your system)	If there are studies a participant must participate in before participating in your study, choose them here. You may select multiple studies. You may specify that participants must have participated in *at least one*, 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	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.

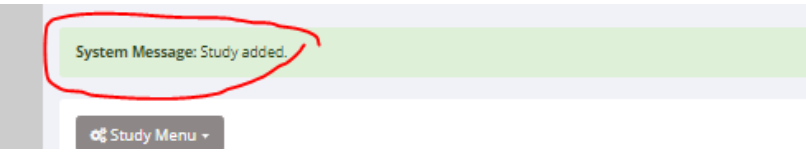
might be disabled on your system)	
Should participants be identified only by a unique, random ID code?	If enabled, then researchers will not see participant names, but instead an ID code to identify them. This setting only applies for online studies, and only if ID codes aren't already enabled system-wide 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-Qualtrics LINK (see image below table)	**<u>For Weber State:</u>** Paste in the Anonymous Distribution Link for your Qualtrics survey. Add at the end of the link: ?id=%SURVEY_CODE% (No additional spaces). *Example:* https://weberstate.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE then change it to https://weberstate.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE?id=%SURVEY_CODE% (Note: "id" must be in lower-case) **<u>General Info:</u>** 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).

Qualtrics Study Link- image (see Study URL in Table above)



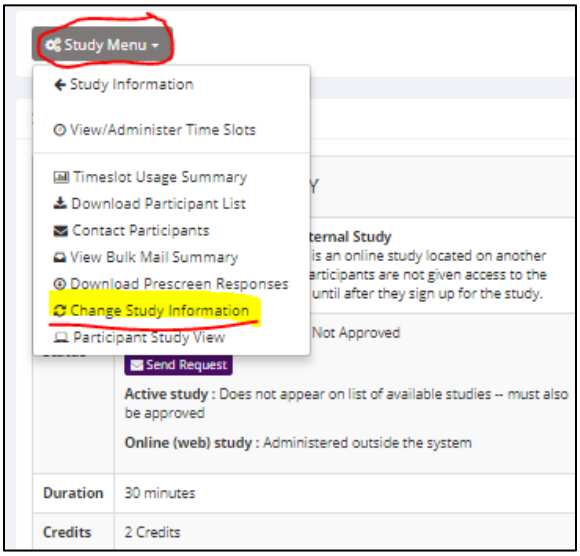
Once you have filled out the appropriate information, select save and the system will be updated immediately with the information.



Online External Studies

External Study Credit Granting

With External Study Credit Granting, a participant can receive credit as soon as they finish the online external study. This is accomplished by having the external study notify the system that the participant has completed the study and thus deserves credit.

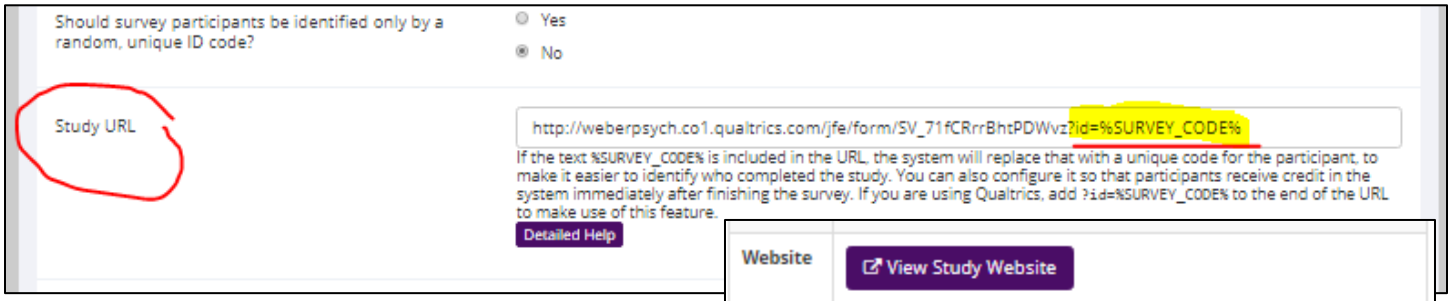


External Study Credit Granting with Qualtrics

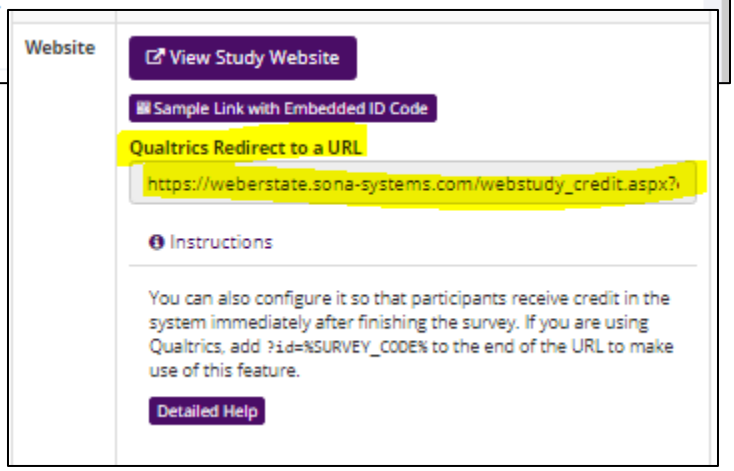
As stated previously in the Basic Information Table, you should have entered in the Anonymous Distribution Link for your Qualtrics survey and added additional coding at the end. If you did not enter in the link and/or added the coding, select the "Change Study Information" under the Study Menu and follow step one below. If you do have your link set up, move onto step two.

1) On your Sona Systems site, change the Study URL so it includes ?id=%SURVEY_CODE% in the URL. So if the Qualtrics URL (Anonymous Survey Link) is:

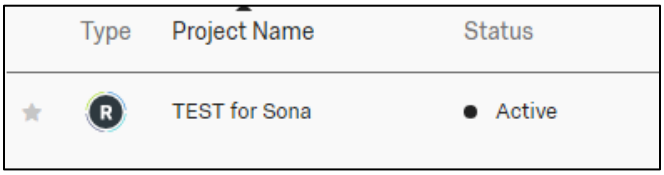
   https://weberstate.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE
   then change it to https://yourschool.qualtrics.com/jfe/form/SV_b9ZD41hMZaqE?id=%SURVEY_CODE% (Note: "id" must be in lower-case)

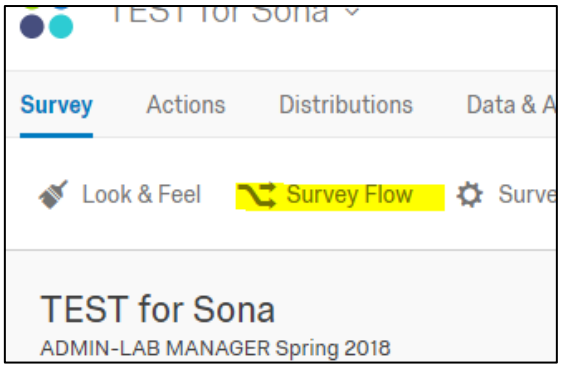


2) Having completed Step 1, the Study Information on your Sona Systems site now displays a URL labeled "Qualtrics Redirect to a URL". Select the Redirect URL and copy it.

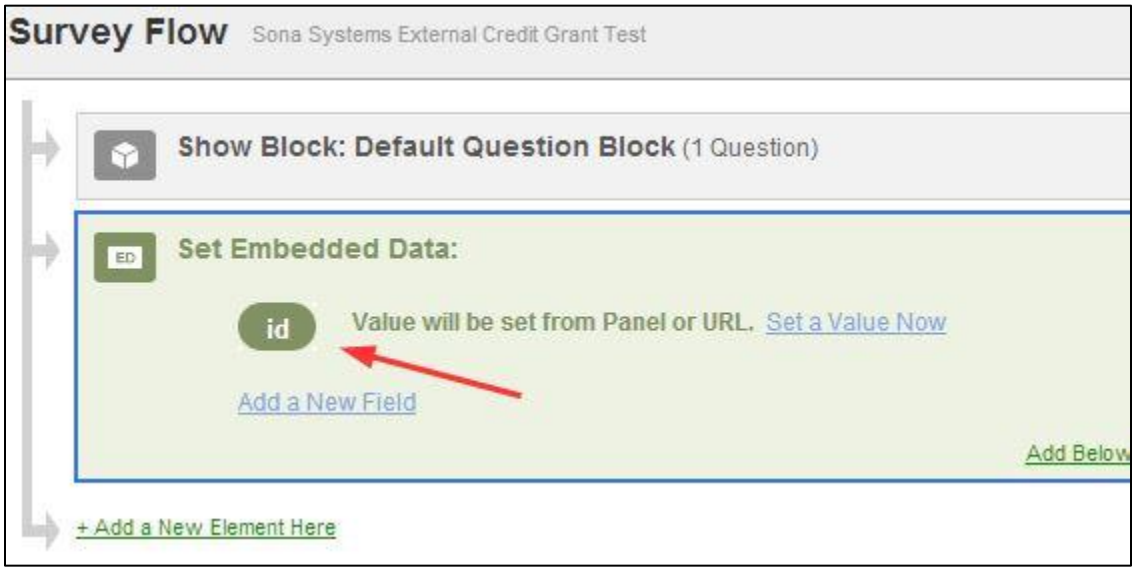


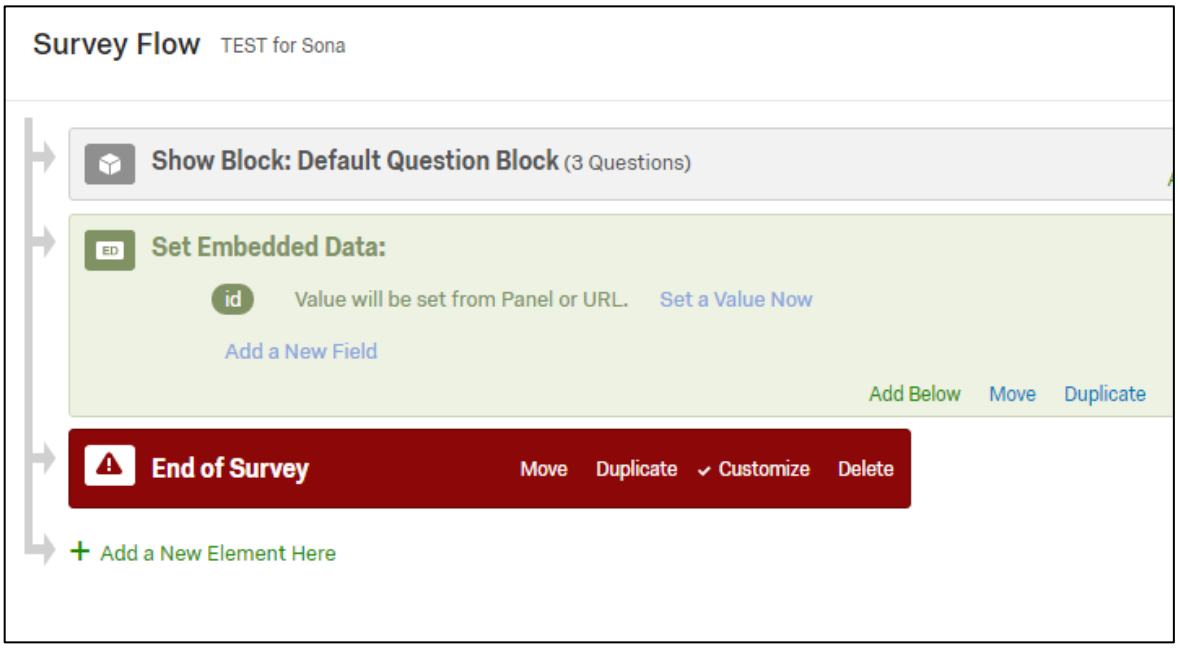
   a) Log in to Qualtrics and select your survey and go to Survey Flow.



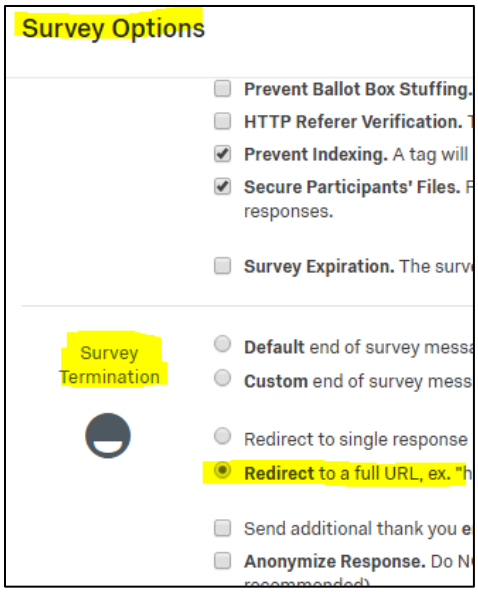


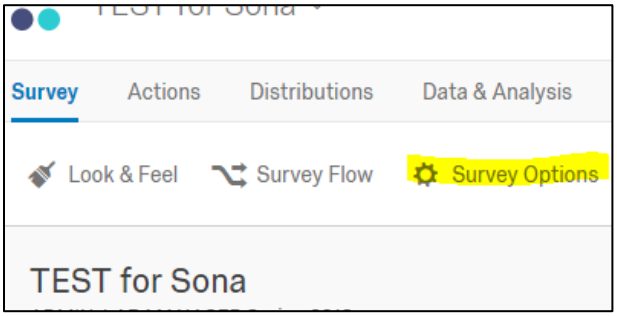
b) In order for participants to receive credit, Sona will assign a temporary survey code number. You will now configure the survey to accept the survey code number as an embedded data field named "id". Remember to use lower-case as this is case-sensitive. To do this, select “Add a New Element” at the end of the Survey Flow. A box asking “what do you want to add?” Will pop up. Select Embedded Data. For the Data Field, type in "id" and save your changes. (Note: if you have an “End of Survey” Element, make sure the Embedded Data is just before it.)

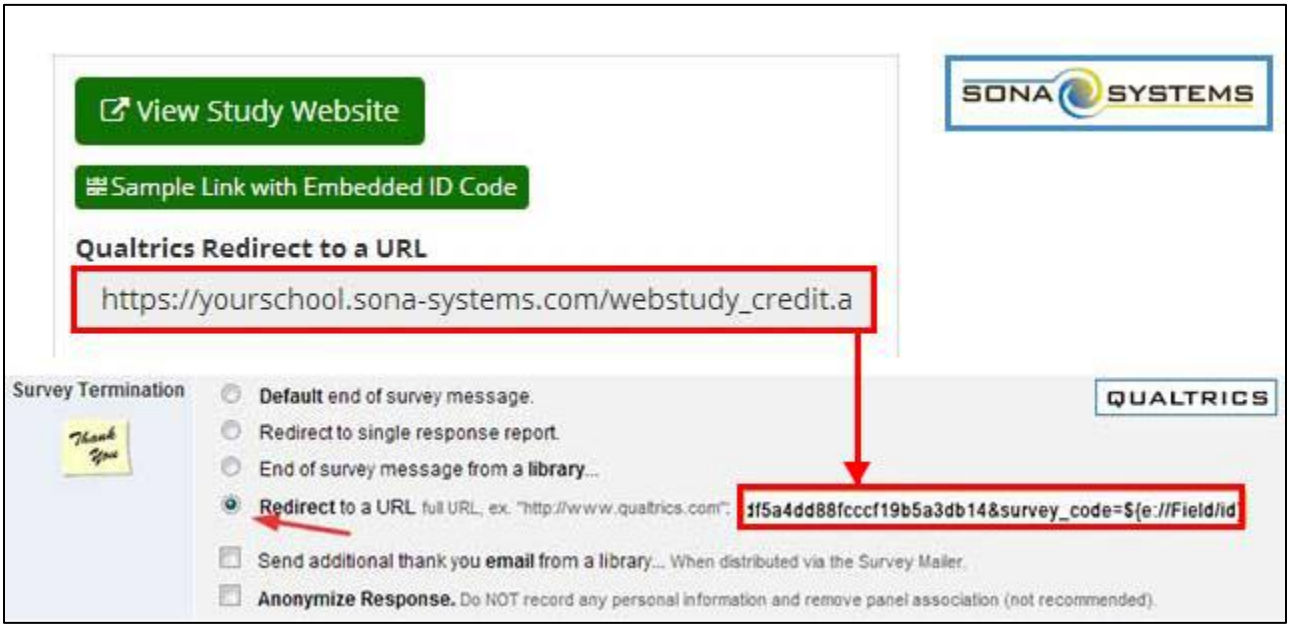


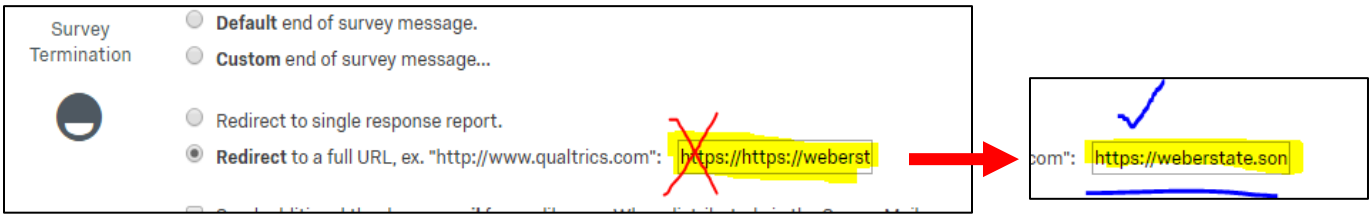


c) Now you will configure the Qualtrics survey to be redirected back to Sona Systems. Select Survey Options, go to the Survey Termination section, and select the "Redirect to a Full URL" option. Paste in the Redirect link you copied from Sona Systems. **(***NOTE*** Qualtrics provides http:// automatically. Make sure http:// is entered only ONCE. If http:// is entered in twice, the link will not work and credit will not be assigned to participants.)** Save Changes.

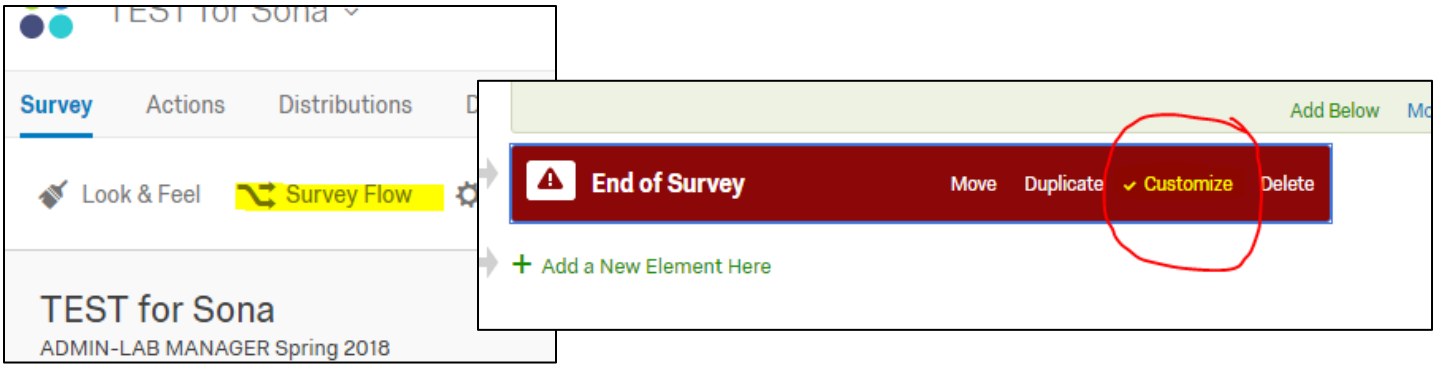


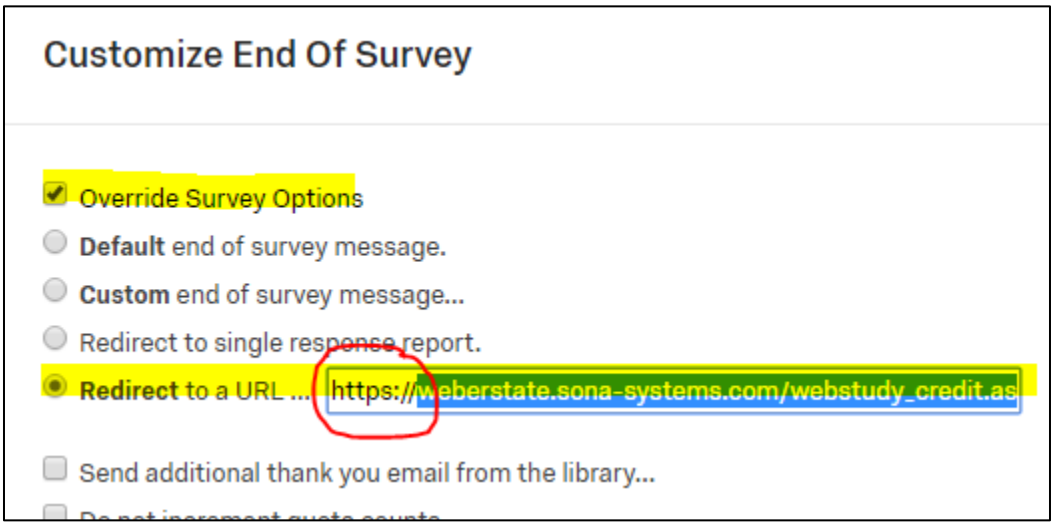


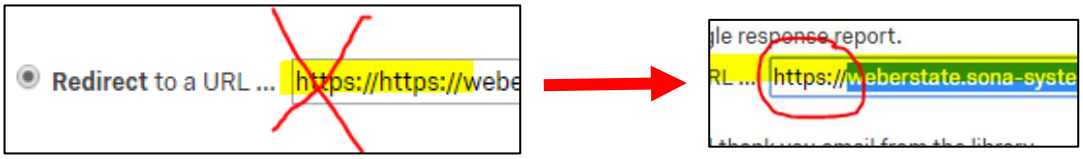




d) If you have an End of Survey element at the end of your Survey Flow, you will need to paste the Redirect Link there as well. Go to Survey Flow and select Customize on the End of Survey Element. Check the Override Survey Options box and select Redirect to a URL. Paste the Redirect Link you copied from Sona Systems. Once again- **Qualtrics provides http:// automatically. Make sure http:// is entered only ONCE. If http:// is entered in twice, the link will not work and credit will not be assigned to participants.)** Save Changes.





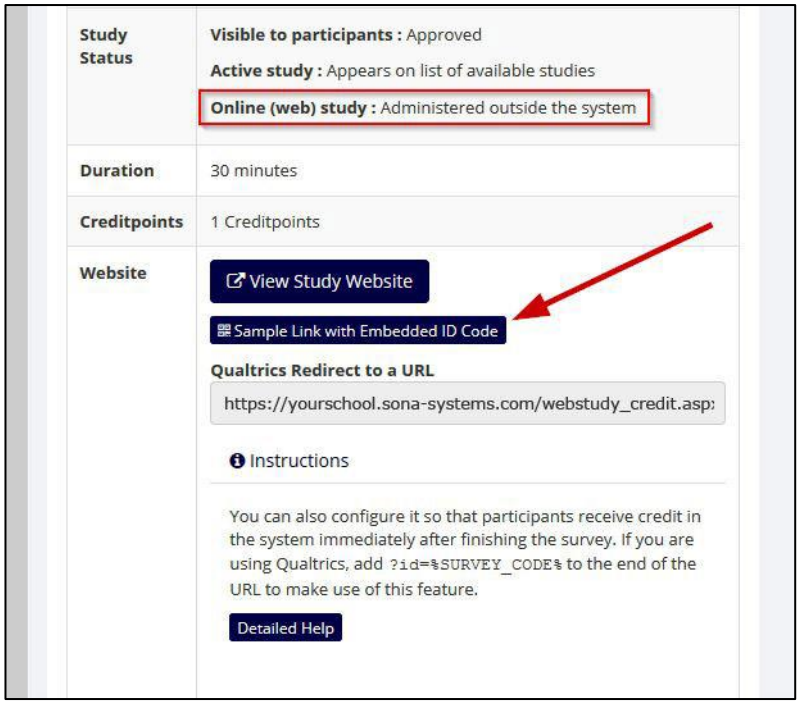


Testing External Study Credit Granting Integration

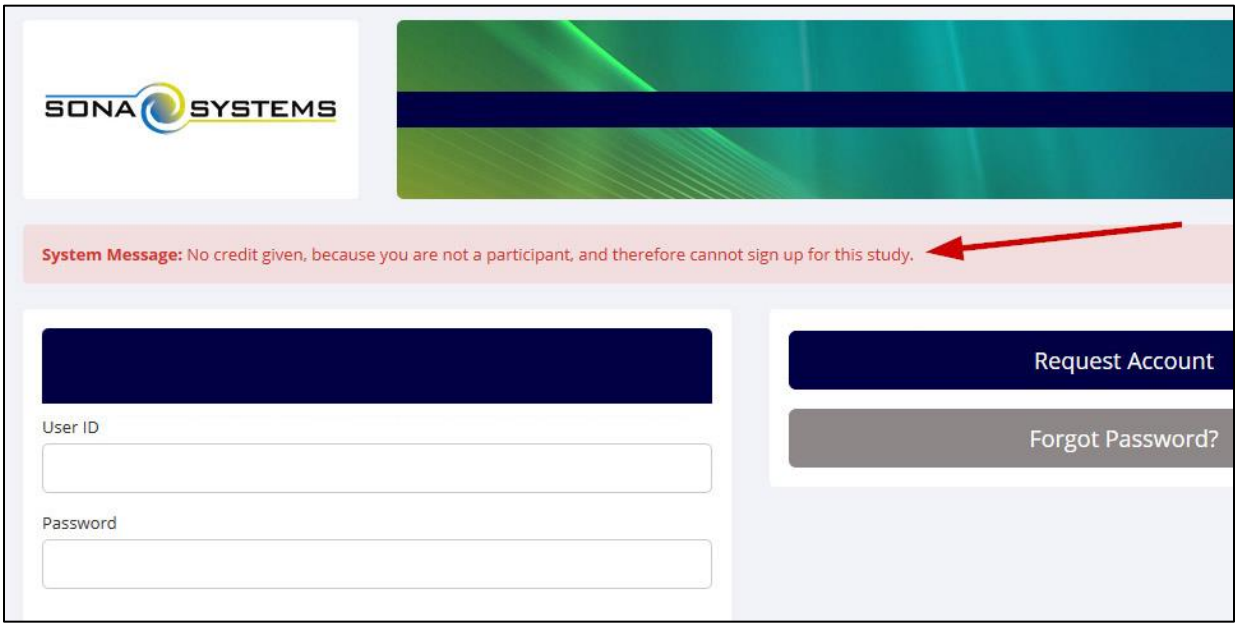
To test the integration as a researcher, PI, or administrator, go to the study information page on your Sona site, and click the "Sample Link with Embedded ID Code" link. If this link does not appear, then verify you have set up the correct study type (Web Study) and the Study Status is "Online (web) Study: Administered outside the system".

If the study type is not correct, create a new study of the correct type (Online External Study).

If the study type is correct, but you still do not see the "Sample Link with Embedded ID Code", then verify you have %SURVEY_CODE% correctly in the Study URL field (review Step 1 of the integration instructions).



Once this link appears properly, click it and take your survey as if you were a participant. When you reach the end of the survey, you should be redirected back to the Sona site. If you are not, then you need to check that you configured the redirect correctly in your online survey (the last step of the integration instructions).

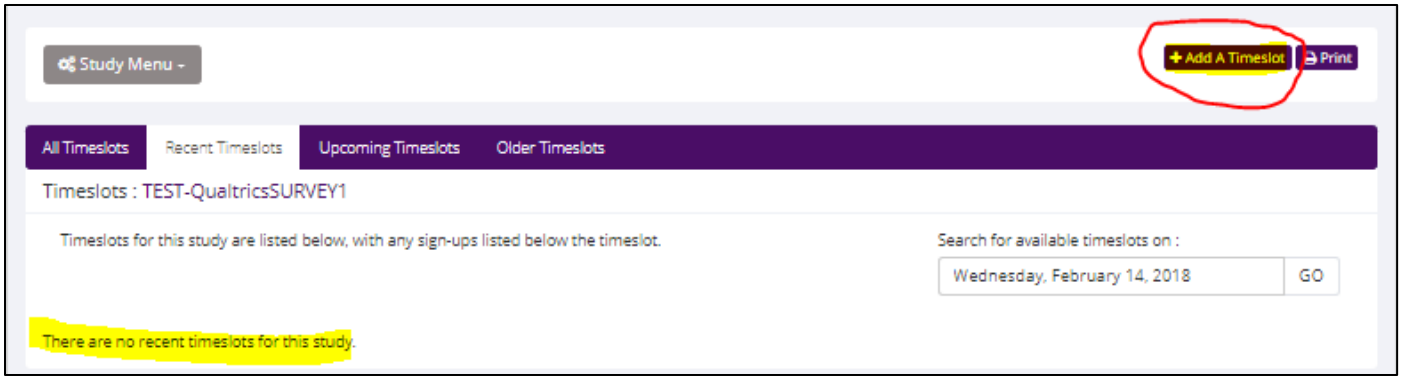


When you are redirected to the Sona site, if you see the message: "No credit given, because you are not a participant, and therefore cannot sign up for this study.", then it worked! That indicates the system received a code indicating who you are, and it realizes you are not a participant and can't sign up for the study.

If you see a message like "Invalid Survey Code" or "Invalid Survey Code: -6" then you need to check the last step of the integration instructions again. Most likely, the problem is there **(Check if https:// has been entered in twice)**. Remember that the redirect URL you paste in from your Sona site to your survey is unique for each study on your Sona site, so you can't use the same redirect URL for different studies.

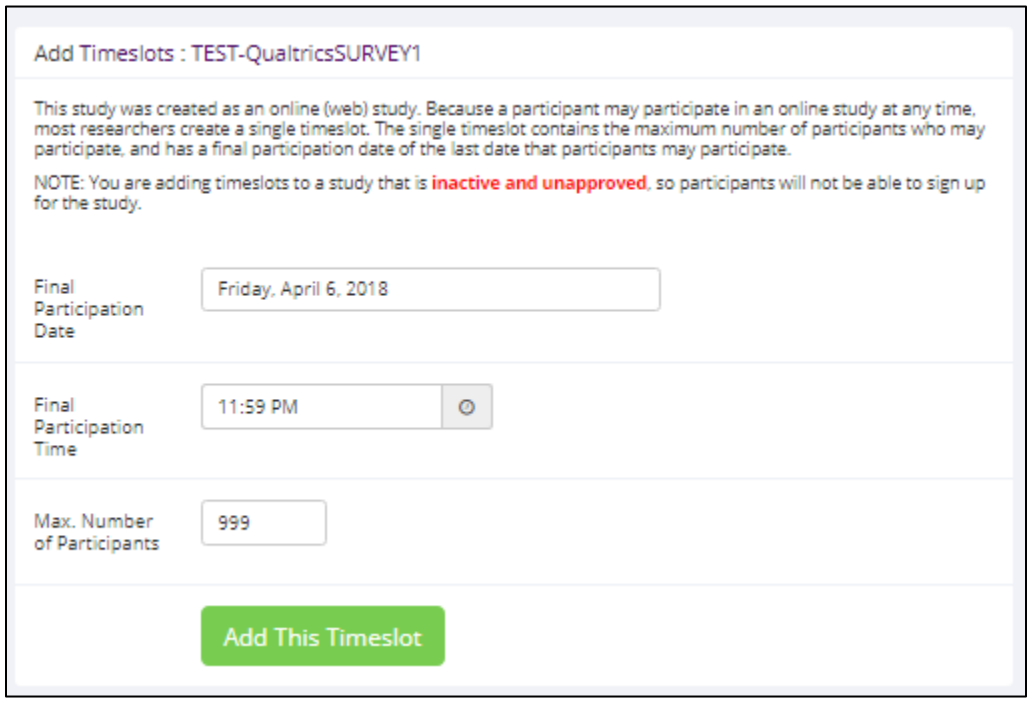
Creating an Open Time Slot for an Online External Survey Study

In order for participants to access your external 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".



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.



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)