Liverpool Hope University – School of Psychology

Sona System

Researcher Documentation

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Contents

Introduction

Sona is a psychology experiment management system, which provides an easy method for you, the researcher, to create and advertise studies. Each study may have a number of time slots which are the time(s) when you plan to run the study. Participants can then sign up for a study and pick a convenient timeslot. You can then grant/revoke credits after the session has occurred. Everything is done through the software's web-based interface, so you can access the system at any time, from any computer, with a standard web browser and internet connection.

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

Getting Started – The Basics

Once you have received your logon information, this will be sent by email, you can login to the system.

Type the following into the address bar of your browser and press enter.

http://liverpoolhope.sona-systems.com/

This will take you to the Sona Login screen. Type your **User ID** and **password** in their respective fields and click **Log In**.

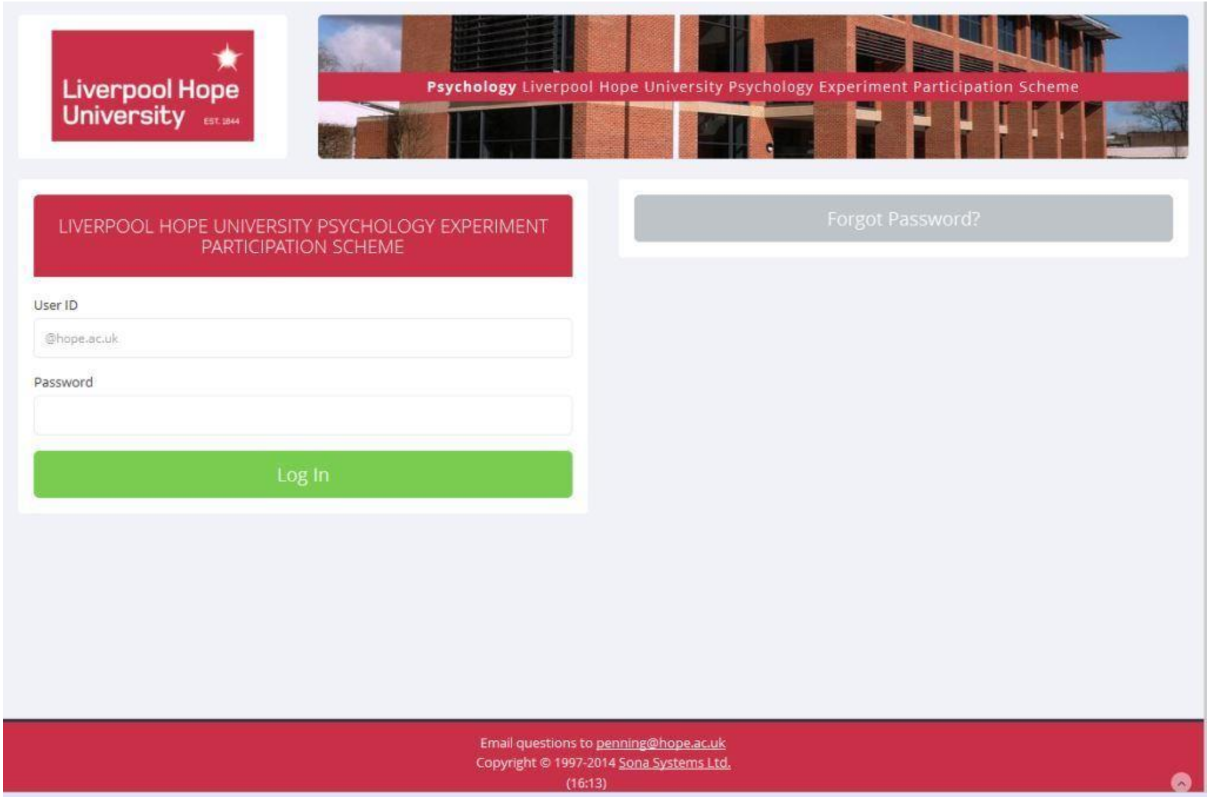


Figure 1

Changing Your Password

When you first login, you will see the welcome screen. If you wish to change your password from the one allocated you should follow the steps below.

From the **red menu bar** you should click on **My Profile** as circled in Figure 2.

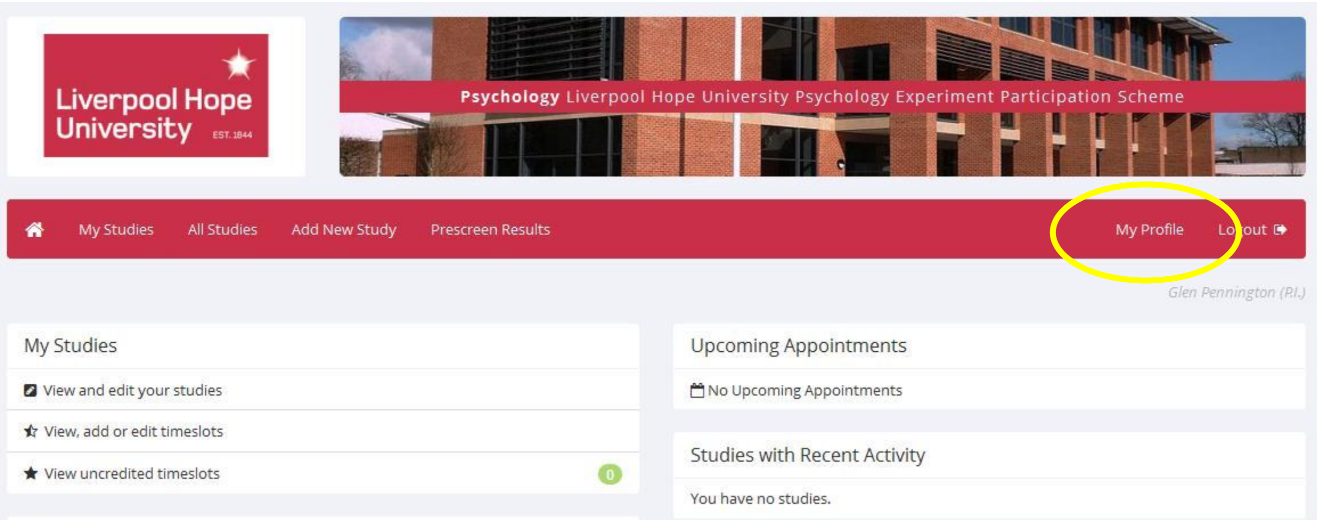


Figure 2

At the **My Profile** page, go to the **Change Password** section. Type your current password in the **Current Password** field, and then type a password of your choice in the **New Password** field. Retype your new password again in **New Password (confirm)** field and click **Update**.

Note: When changing your password please make sure that the password you choose is unique to you and that only you can guess it. Never give your password to anyone else. A good password should be at least 8 characters in length and contain both letters and numbers.

Logging Out

To Log Out of the system, simply select **Log Out** from the **red menu bar**. If your session is inactive for more than 20 minutes Sona will automatically log you out. If this happens you can log back in immediately.

Setting up an External Survey Study on SONA

This option is typically used for studies created using Survey Monkey.

Click on **Add new Study** circled on Fig. 3 below. You will see a screen with a number of options; you should select **Online External Study** (Fig.4).

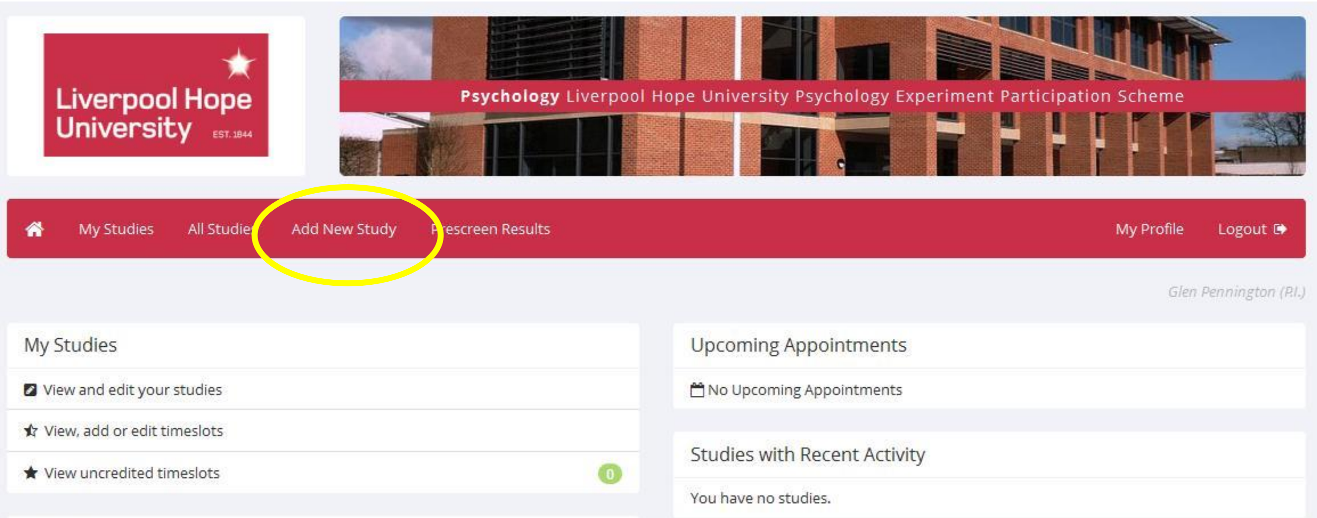


Figure 3

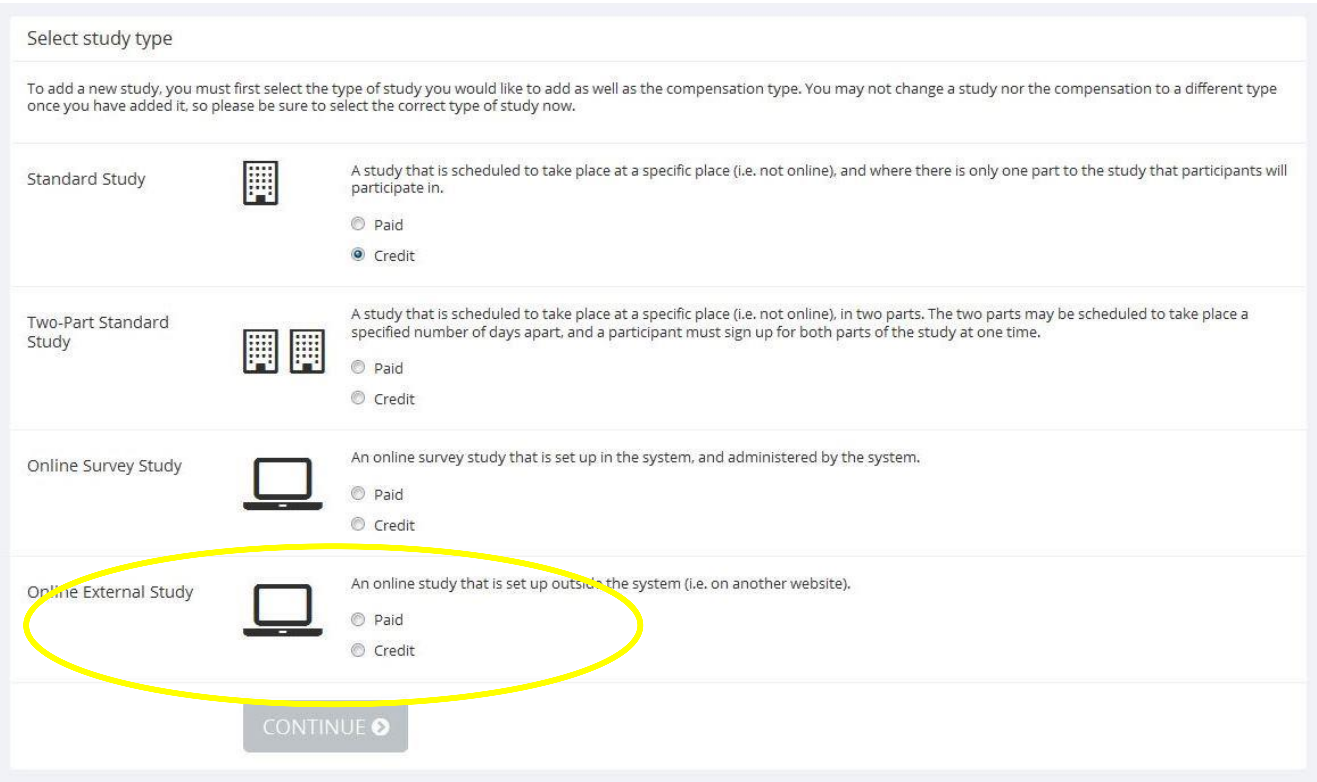


Figure 4

After clicking **Continue** you will see a screen with a number of options as per Fig. 5 You should complete all of the **Basic Study Information**. Here you will name the study, and give a brief description. Most importantly is Eligibility requirements, Duration and Credits, highlighted below.

Enter the basic information (See Fig.5 for reference)

- **Study name** (This should be a short title describing your study)*
- **Brief Abstract** and **Detailed Description** are optional
- **Eligibility Requirements**. Usually set to NONE as a default, but you can specify a specific requirement such as “female”*
- **Duration**. Time in minutes to complete study*
- **Credits**. This is a multiple of 1 credit for each 15 minutes. E.g. a 30 minute survey would get 2 credits*
- **Preparation**. Usually set to None
- **Researcher**. This should be automatically set to your name, if not scroll and find your name to select it
- **Principal Investigator**. Select your supervisor’s name from the list
- **Hope Ethics board Approval code**. Leave this blank
- **Approved**. Tick Yes ONLY if you have received Ethics approval
- **Active Study**. Leave set to NO for the moment, this can be changed later once you have completed setting up the other aspects of your study

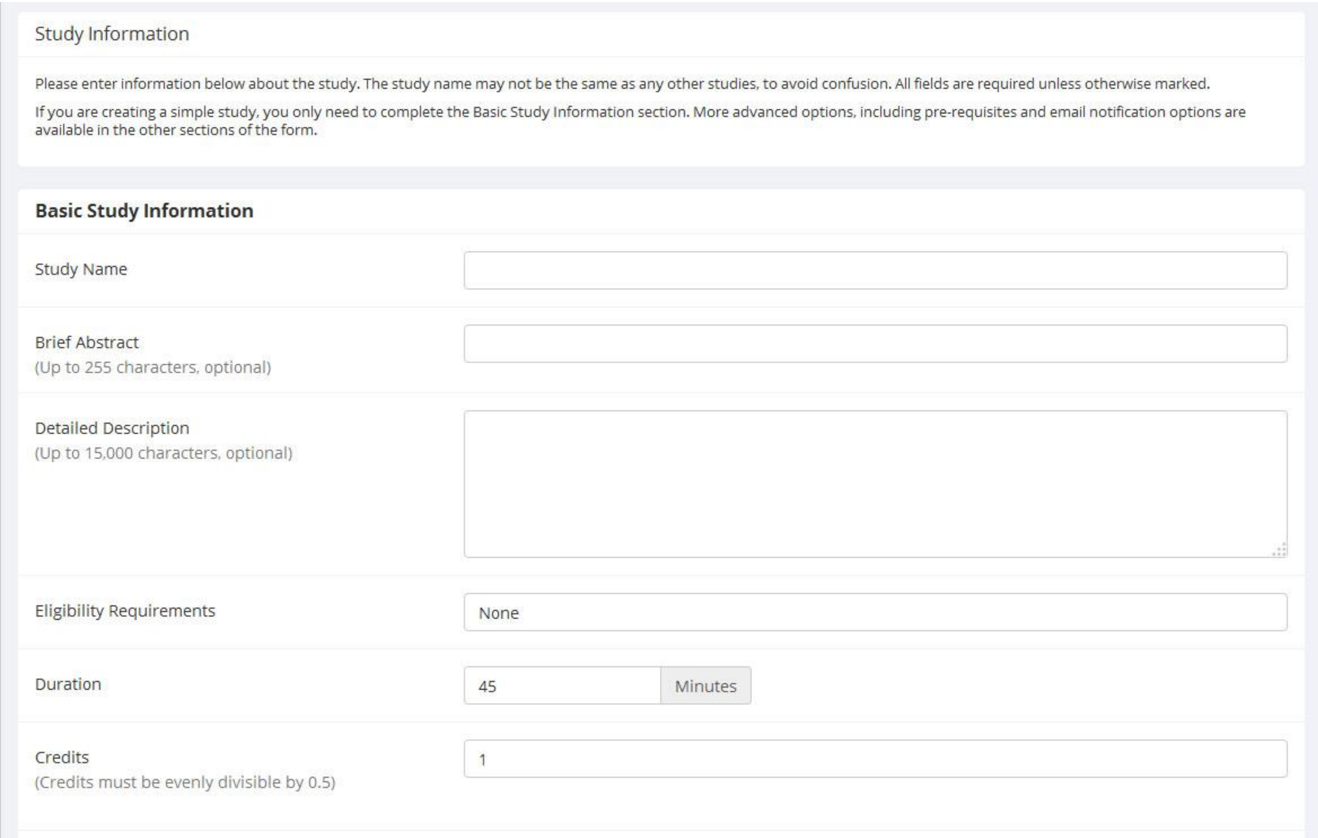
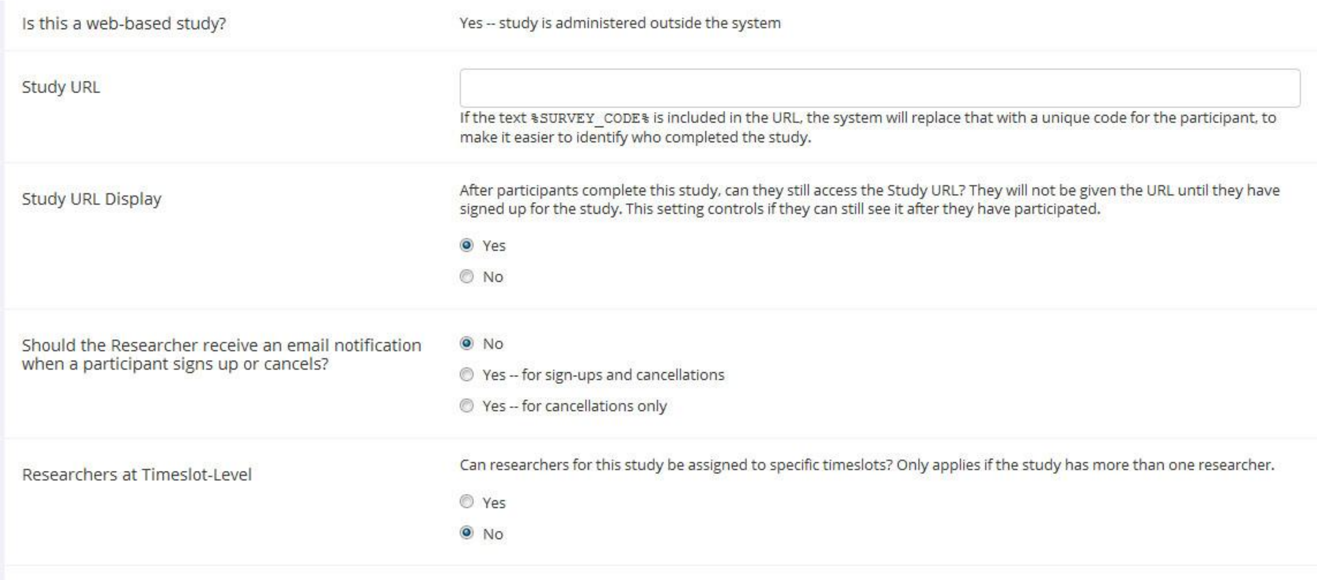


Figure 5

Then scroll down to complete any **Advanced Study Information** (Fig.6) and under **Course Restrictions** move **FOP 2014/15** to the box on the right hand side of the screen. Type or paste your study URL into the appropriate box and paste `%SURVEY_CODE%` after the survey link leaving no spaces, then click **Add This Study**.



Is this a web-based study?	Yes -- study is administered outside the system
Study URL	If the text %SURVEY_CODE% is included in the URL, the system will replace that with a unique code for the participant, to make it easier to identify who completed the study.
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. Yes No
Should the Researcher receive an email notification when a participant signs up or cancels?	No Yes -- for sign-ups and cancellations Yes -- for cancellations only
Researchers at Timeslot-Level	Can researchers for this study be assigned to specific timeslots? Only applies if the study has more than one researcher. Yes No

Figure 6

Once you have completed these steps go to page 10 Adding Timeslots

Setting up an Online Survey Study Within Sona

Click on **Add new Study** circled on Fig. 7 below. You will see a screen with a number of options; you should select **Online Survey Study** (Fig.8).

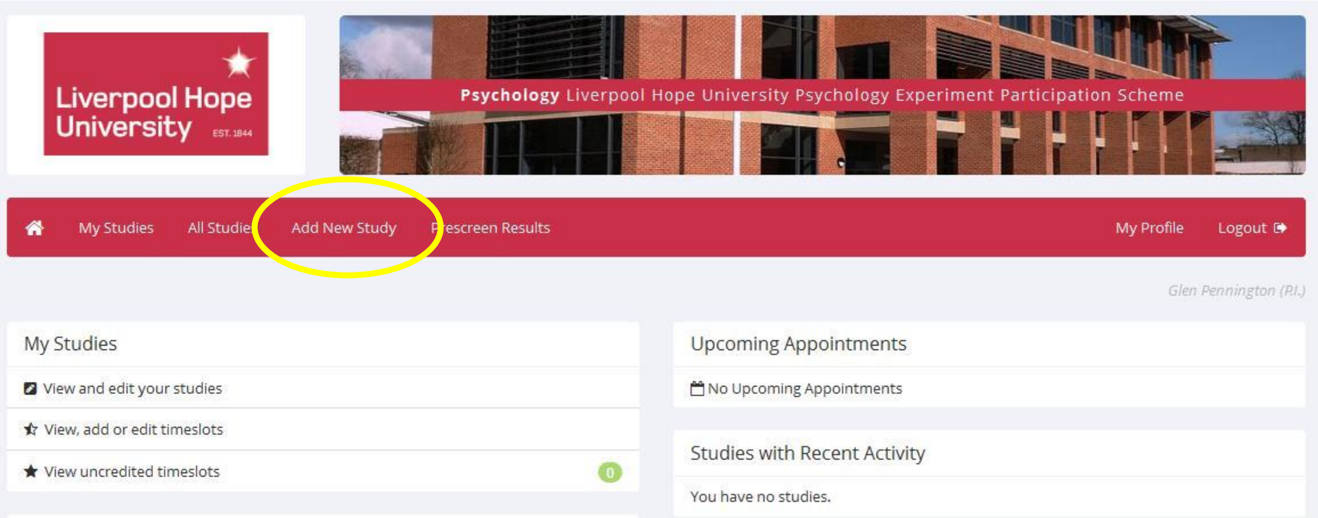


Figure 7

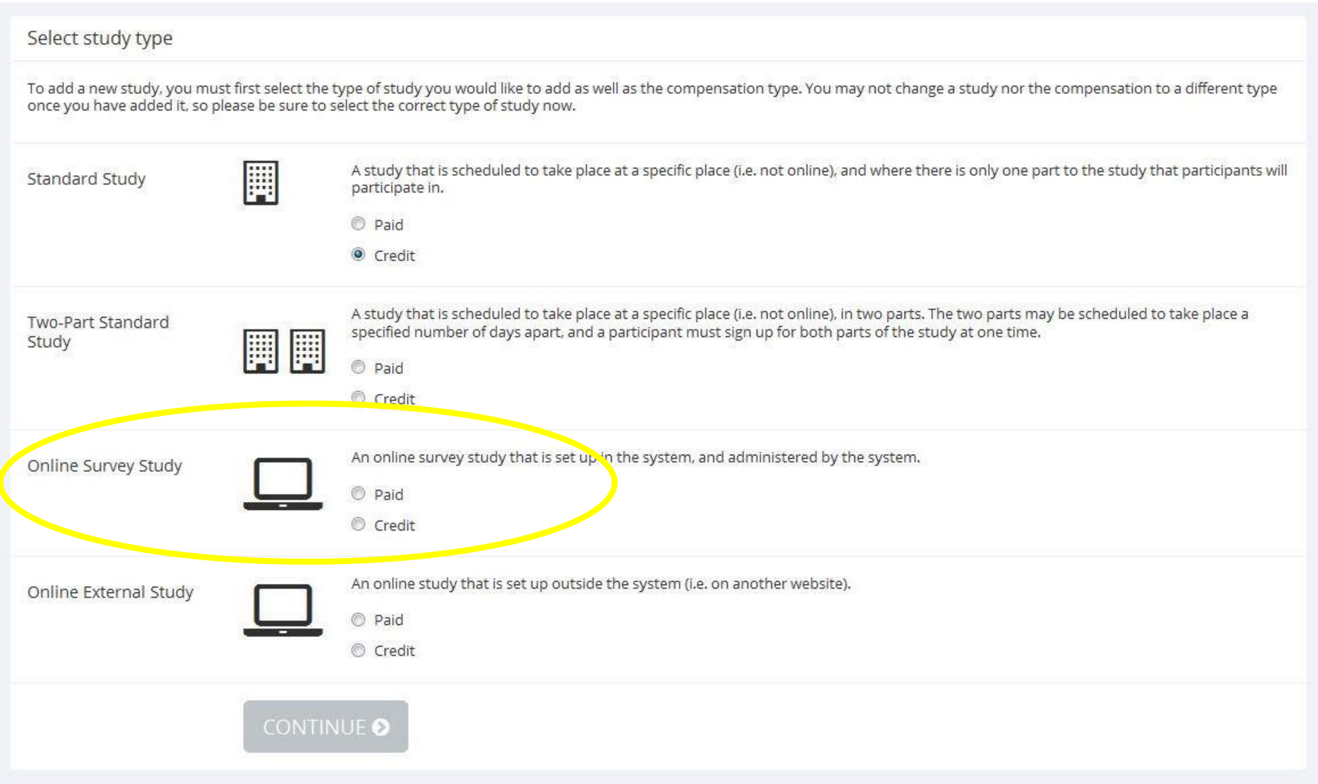


Figure 8

Before you can define you study you will see a warning message as below.

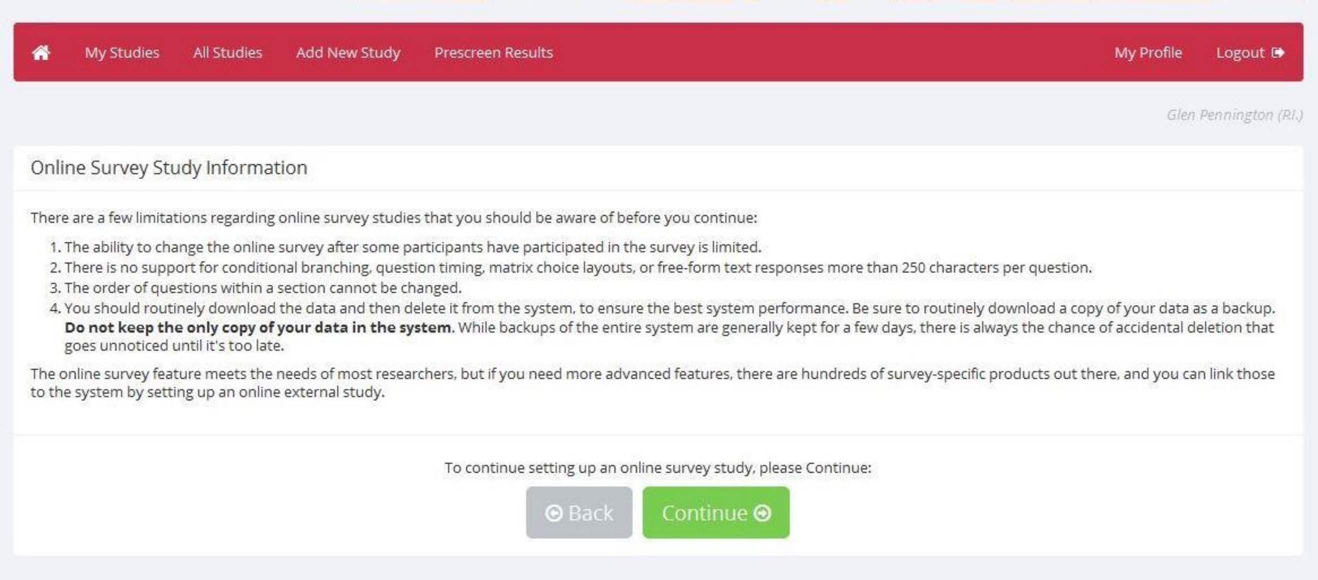
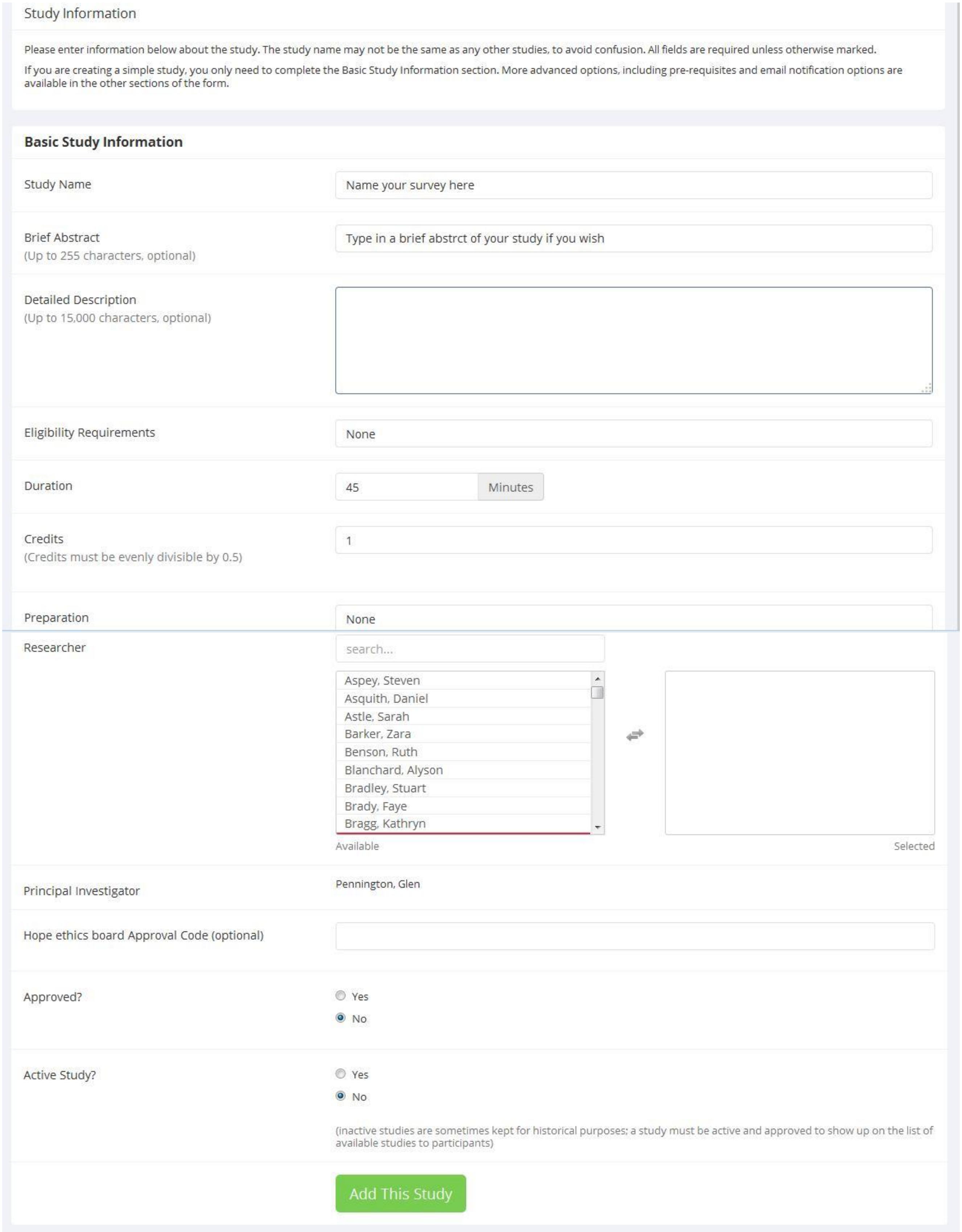


Figure 9

Next you will see the **Basic Study Information** page. Here you will name the study, and give a brief description. Most importantly is Eligibility requirements, Duration and Credits, highlighted below.

Enter the basic information (See Fig.10 for reference)

- **Study name** (This should be a short title describing your study)*
- **Brief Abstract** and **Detailed Description** are optional
- **Eligibility Requirements**. Usually set to NONE as a default, but you can specify a specific requirement such as "female"*
- **Duration**. Time in minutes to complete study*
- **Credits**. This is a multiple of 1 credit for each 15 minutes. E.g. a 30 minute survey would get 2 credits*
- **Preparation**. Usually set to None
- **Researcher**. This should be automatically set to your name, if not scroll and find your name to select it
- **Principal Investigator**. Select your supervisor's name from the list
- **Hope Ethics board Approval code**. Leave this blank
- **Approved**. Tick Yes ONLY if you have received Ethics approval
- **Active Study**. Leave set to NO for the moment, this can be changed later once you have completed setting up the other aspects of your study


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.

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	Name your survey here
Brief Abstract (Up to 255 characters, optional)	Type in a brief abstrct of your study if you wish
Detailed Description (Up to 15,000 characters, optional)	
Eligibility Requirements	None
Duration	45 Minutes
Credits (Credits must be evenly divisible by 0.5)	1
Preparation	None
Researcher	search... Aspey, Steven; Asquith, Daniel; Astle, Sarah; Barker, Zara; Benson, Ruth; Blanchard, Alyson; Bradley, Stuart; Brady, Faye; Bragg, Kathryn — Available / Selected
Principal Investigator	Pennington, Glen
Hope ethics board Approval Code (optional)	
Approved?	Yes / No
Active Study?	Yes / No (inactive studies are sometimes kept for historical purposes; a study must be active and approved to show up on the list of available studies to participants)

Add This Study

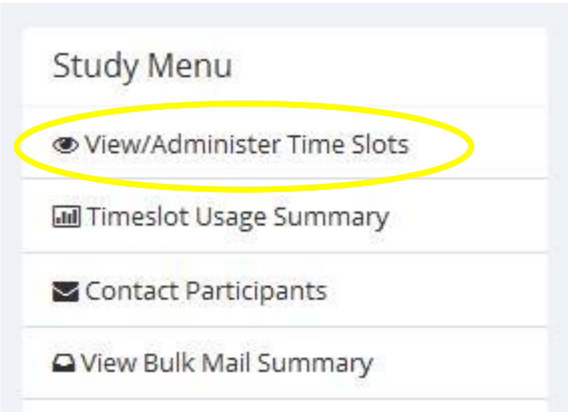
Figure 10

There are a number of advanced settings below the **Add This Study** button. Scroll down to complete any **Advanced Study Information** and under **Course Restrictions** move **FOP 2014/15** to the box on the right hand side of the screen. You can check through to see if there are any disqualifying or pre-requisites aspects that apply to your study and once you are happy with the settings you can select **Add This Study**. Your standard study is now added.

Editing an Online Survey Study

You can go to **My Studies** on the **red menu bar** and make modifications including adding time slots, sections and questions. Online surveys are usually set up with one timeslot and a maximum number of participants. Once a participant has taken part in your study they would automatically be allocated any credits available to them.

Adding Timeslots



On the page you should see details as indicated in Fig.11, 12, & 13.

Click on **View/Administer Time Slots** and choose an appropriate date and a time for the final participation date for your study. You should leave adequate time for as many people as possible to take part, but remember that you will need plenty of time to analyse your data for your dissertation write up.

Don't forget to click **Add This Timeslot**.

Figure 11

Figure 12

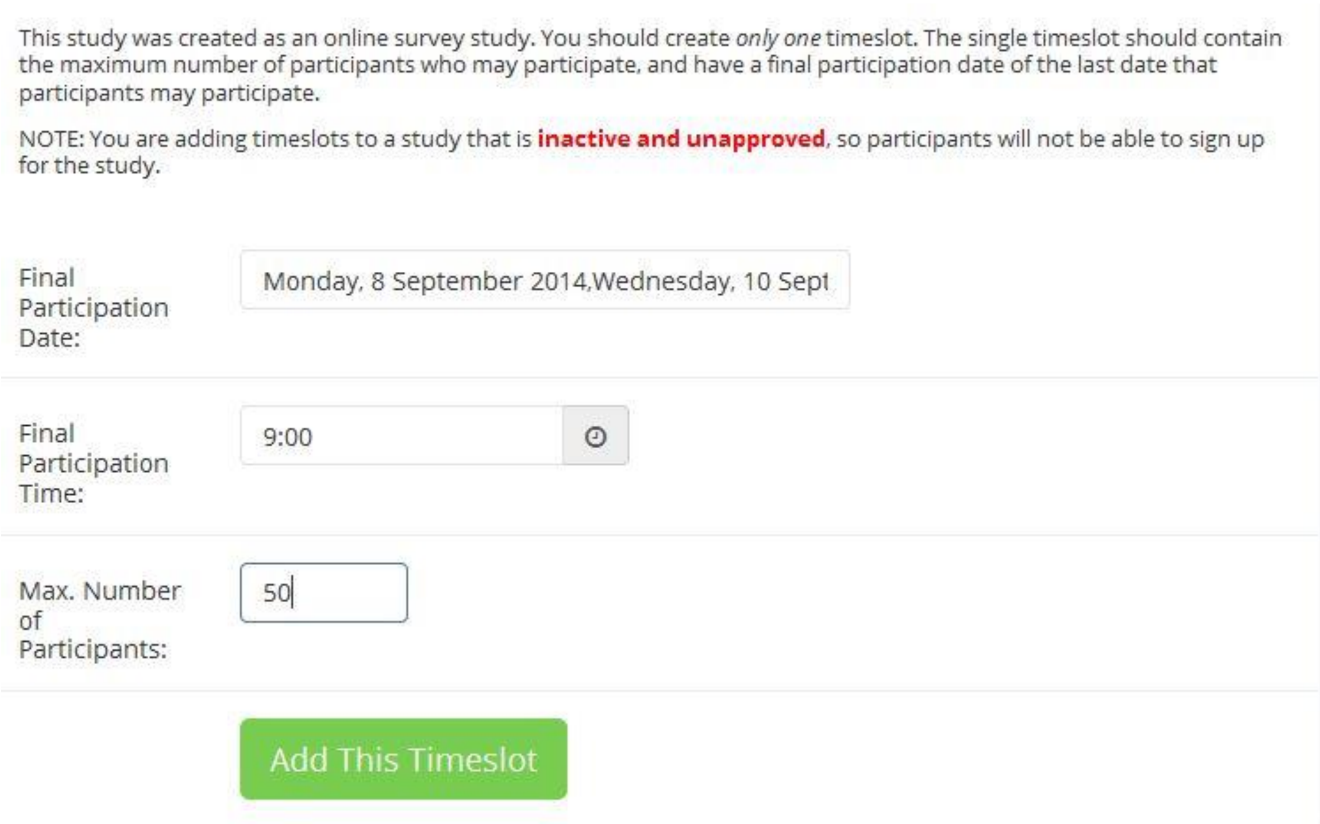


Figure 13

Adding Sections

Click on **Update Online Survey** from the **Study Menu** back on **My Surveys** page.

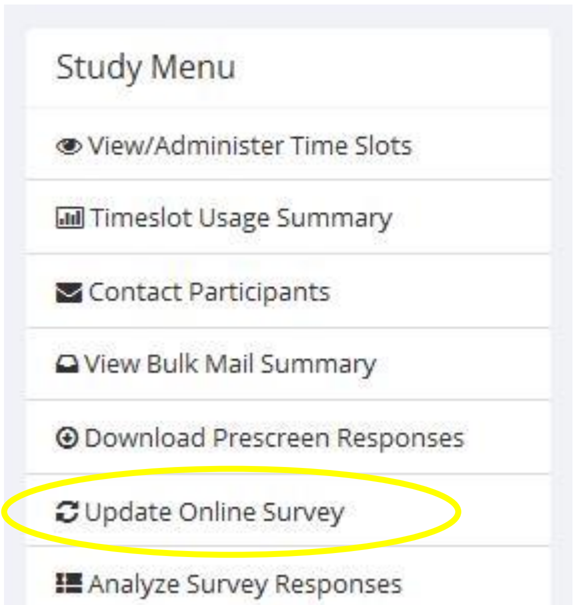


Figure 14

You are required to have at least ONE section to be able to create a survey. Click on the Add a New Section button to reach the next screen.

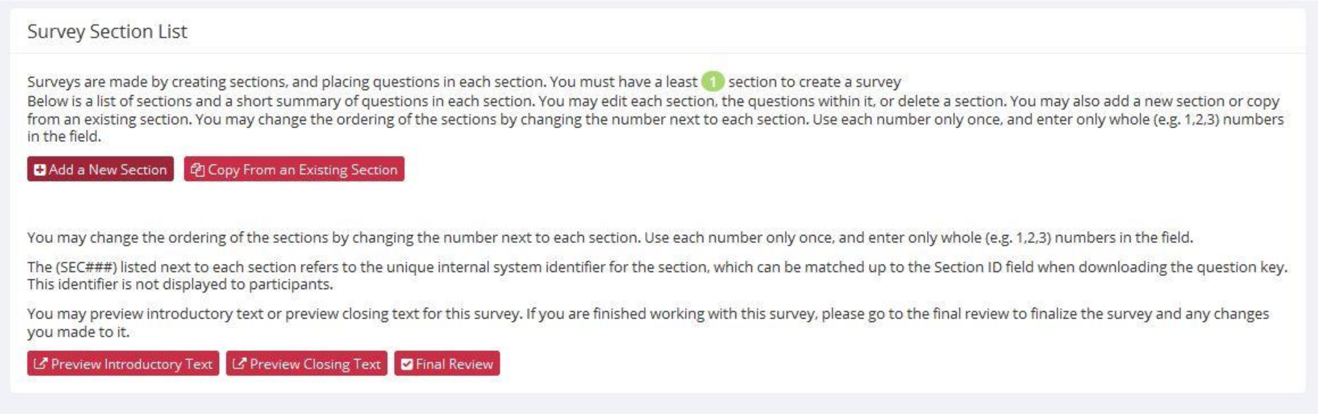


Figure 15

This section gives you the following options

- **Display Questions in Random order**. This is your decision, but the default setting is No
- **Computer Section Type**. Default is No sum or average score
- **Introductory Section Text** (optional). Here you should type in a title for your section. E.g. *Demographic Information* or *General Health Questionnaire.* You can also add a small amount of text to indicate the method a participant should use to respond. An Example is shown in Fig.16.

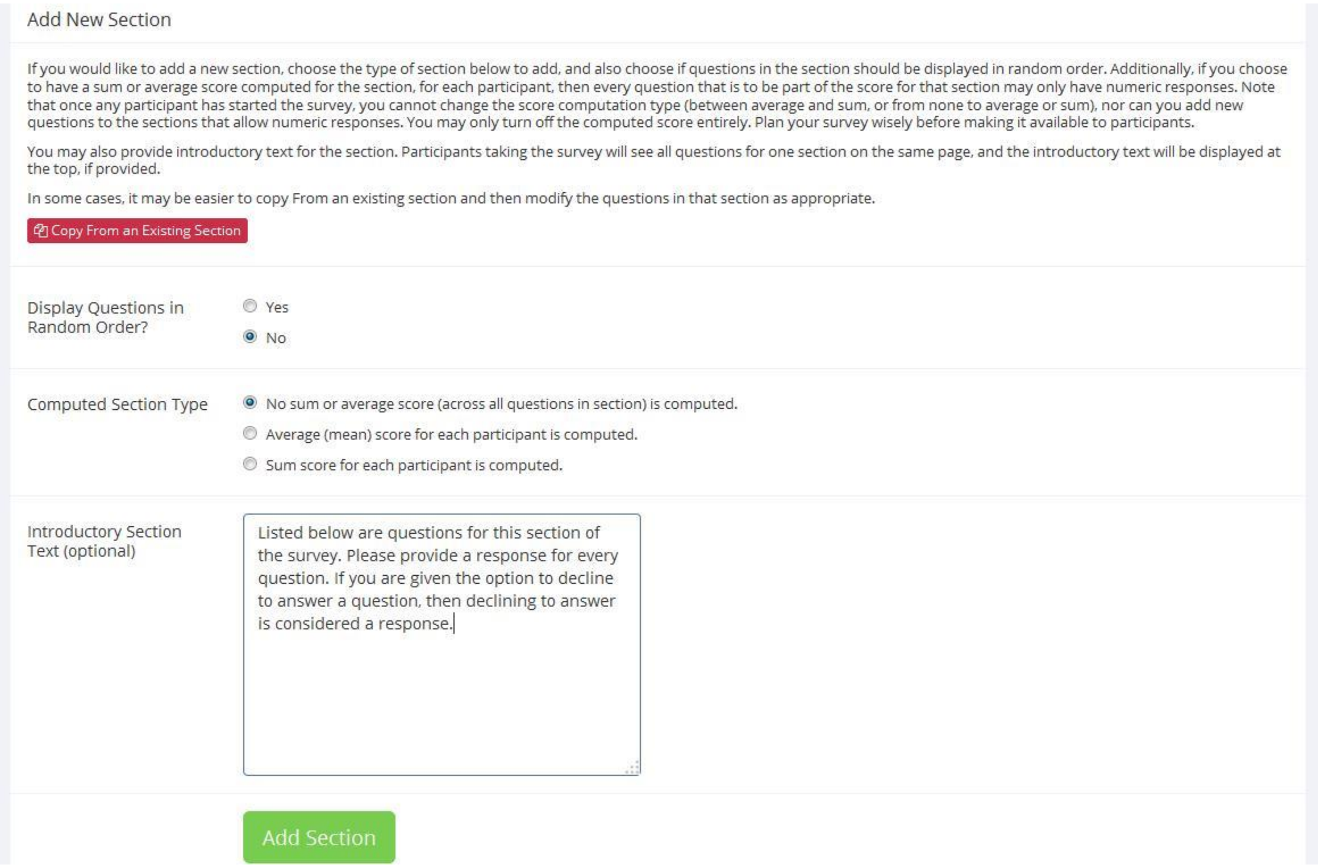


Figure 16

Once you have named your section and chosen which settings are appropriate click on **Add Section**.

Adding Questions

There are several question types available to you using Sona Online Survey. This document will guide you through Multiple Choice and Free Text question types. Once you understand how to use these you should be able to apply this understanding to the other question types.

Click on **Update Online Survey** to begin adding questions, or if you have set up a study and now want to add more questions go to **My Studies → Select your study→** and Click **Edit Questions and Sections**

Multiple Choice Questions

You will begin with a screen that wants you to input the following (shown in Fig. 17)

- **Question text:** This is where you input your question
- **Abbreviated Question Name:** This is an identifier that you can use later on, useful for analysis purposes. It is recommended that you use this section
- **Question Type:** Three options, free entry, multiple choice with only one response allowed, and multiple choice where more than one response can be selected
- **Length of free entry field:** Only relevant for free entry questions
- **Display choices in a random order:** Only applicable to multiple choice questions and generally not advisable if using a Likert Scale type response
- **How should choices be displayed:** Horizontal or Vertical
- **Can participants decline to answer:** Select **YES** for this section
- **Are all choices numeric:** Select **NO** for this section
- **Display numeric value:** Select **NO** for this section
- **Choices:** This section is where you input the responses, one per line

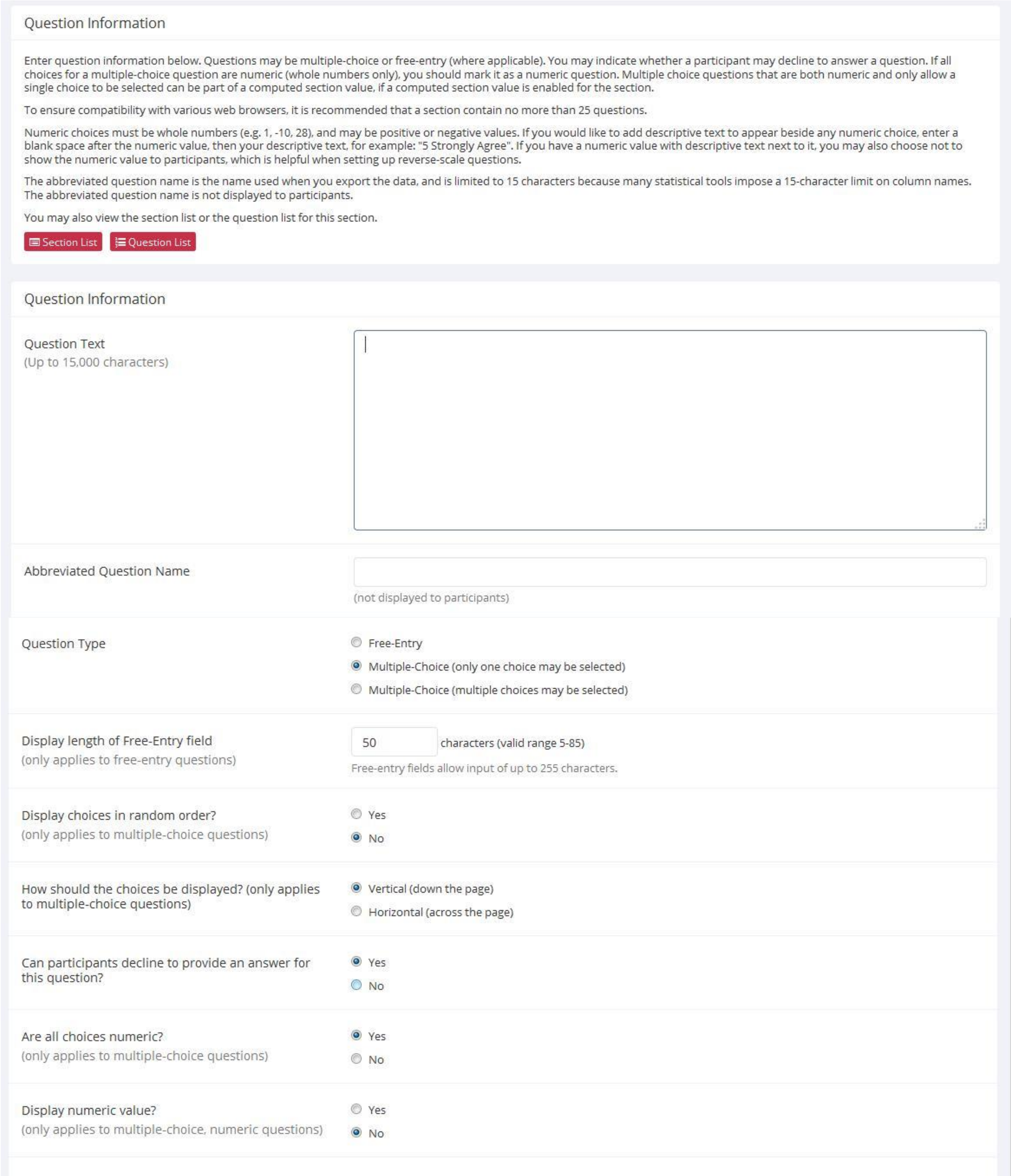


Figure 17

An example of responses in a multiple choice question is shown in Fig.18. Make sure that you Save Changes and following that you should get an on screen confirmation message to indicate that the question has been added.

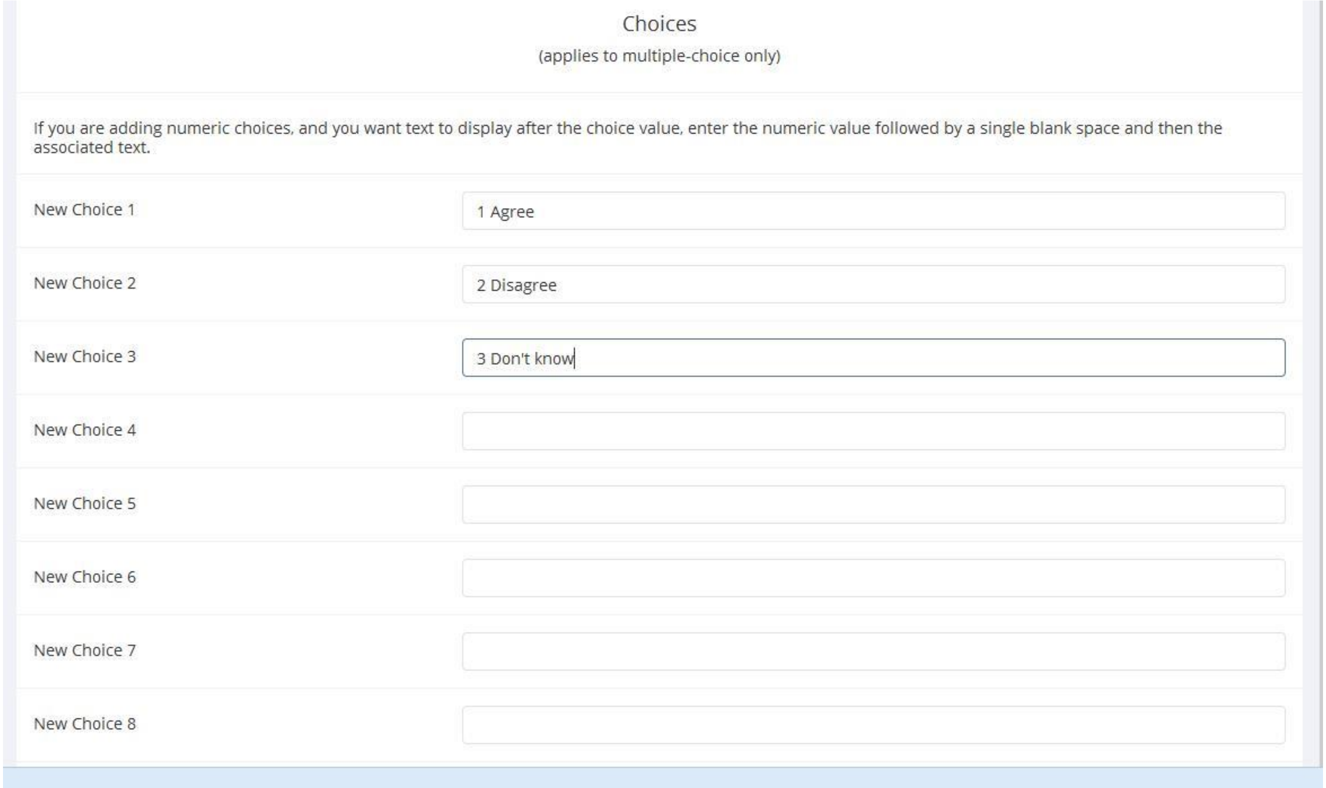


Figure 18

Free Entry Questions

In the Question type section select the option Free Entry. You should type in your question in the Question Text section, provide an Abbreviated Question Name, and choose the Display Length of Free Entry Field. This allows you to display a box of 50-80 characters, but a participant can respond with up to 255 characters.

You can add as many sections and questions as you need.

Making a Study Available to Participants

Ensure that in the Study Information you have completed all the necessary options and scroll down to complete any **Advanced Study Information** and under **Course Restrictions** move **FOP 2014/15** to the box on the right hand side of the screen.

Once you are satisfied that your survey is complete, make sure that you spell check the survey and ensure that you have included all of the questions that you wanted and then you can make it available.

Return to the **My Studies** page and find you study. It should still be within the **Inactive Studies** tab.

Scroll down and select **Change Study Information**, and from the list of options choose **YES** to both **Approved** and **Active Study** and **Save Changes**

Analysing Survey Responses

There are two methods for analysing your data On-Screen or via download.

On-Screen Data Analysis

Analysing the data on screen means that you can only view the responses to one question at a time and it will provide you with a percentage breakdown of responses to multiple choice questions. To do this you should click Analyse **Survey Responses** from the **Study Menu** and scroll down to **Output Format** and choose **On-Screen** from the drop down menu. You will see below that the sections that you created along with the questions from within each section. Choose the question that you want to view the response and press the **View Response Data** button.

This will only provide you with a summary of the data, and in order to properly analyse the data you should use the download method.

Downloading Data

Sona can export data to a comma separate value (CSV) format which can be viewed, edited and analysed in both Excel and SPSS. To do this you should click on **My Studies** and select your study. Scroll down to the **Study Menu** and click on **Download Survey Responses**.

The first section on the screen is displayed in Fig. 19 below.

Download Responses

You may download the entire set of responses (across all participants) for analysis.

The data is laid out in a matrix format, with one row for each participant. Each column corresponds to a question. The first row of the matrix will give the abbreviated question name for each question. You will need to download the question key in order to map the abbreviated question names to the questions. Abbreviated question names were specified when the questions were set up, and duplicate question names are allowed. If duplicate question names are causing confusion, you can match up questions in the question key to responses in the response data by looking at the position of the question. For example, the third question in the question key corresponds to third column of responses in the response data. If this is too difficult to match up, simply edit the relevant questions and change their abbreviated question name (if allowed).

Download the Question Key

The key also contains a section ID code, which is useful if a section average or sum was computed, and you need to determine which questions were part of which section. The section_id field is a unique identifier for the section, but otherwise the value has no specific meaning in terms of determining the order that sections were presented. In the data download, columns which have a name starting with SEC and followed by some numbers are the computed section sum or mean for that respondent, for the section number corresponding to the section ID code in the key. For example, a column labeled SEC123 would refer to the section sum/mean for the section with section ID code 123 in the key.

If you select a Date Range, then the download will be restricted to participants who completed the survey during that date range. It is not based on the timeslot date, but instead on when they completed the survey.

After downloading and saving the data to your computer, you may want to View Survey Data Usage and delete some of the data to save space on the server.

View Survey Data Usage

The data provided only includes data from participants who have completed the survey (not those who are currently taking the survey, if applicable). If data for some respondents has already been deleted, those rows will not be included in the download.

You may choose to download the data in CSV (comma-separated) format, view it in CSV format on-screen, or view it as a table on-screen. If some questions or responses contain data that is not in Roman characters, then the on-screen options may be the only viable method to view the data.

You may choose to download the data in CSV (comma-separated) format. Depending on how your browser is configured, listed below are the 3 scenarios that might happen (if you choose this option) when you perform the download, and information on how to handle the data. When saving the file, it is good to use a filename that ends in `.csv`. The `.csv` file extension may not appear on the save option in your browser, in which case you should just type it in. If you are having problems loading the file in Excel, please try another computer if possible, as some versions of Excel contain a bug that causes problems when importing CSV-format files. Note that Excel and some other programs have a limit on how many columns can be handled. The limit is usually around 250 columns. If there are more than 250 questions, you will want to use a different tool to analyze the data. Most statistics programs can handle large datasets with ease. The abbreviated question names are always no more than 15 characters, so they can easily be loaded as column names in tools like SPSS, which impose a limit on the number of characters in a column name.

1. Data loads in MS Excel. To save the data, choose File | Save As.. and save it as CSV or an Excel worksheet (your choice). If the file loads and the data does not line up into columns properly, save it (instead of opening with Excel), then open the file with Excel.
2. Your browser asks if you would like to save the file. Save the file with a .CSV extension.
3. The browser loads the file on your screen. Save the file with a .CSV extension, using the File | Save or File | Save As.. feature. Be sure to save it as text not HTML format.

(Please be patient while the download is processed. You may click on Submit again if download takes a long time to start.)

Figure 19

This screen provides information about downloading the data and you must download two parts of the data set. Scroll down the page to **Step 1: Download/View Question Key**. Choose **Download Key as CSV file** from the drop down menu. Click **Submit**. A dialog box should appear with options to **Open/Save/Cancel**. Choose **Save**. Make sure you save this to your USB pen drive or to your I: drive.

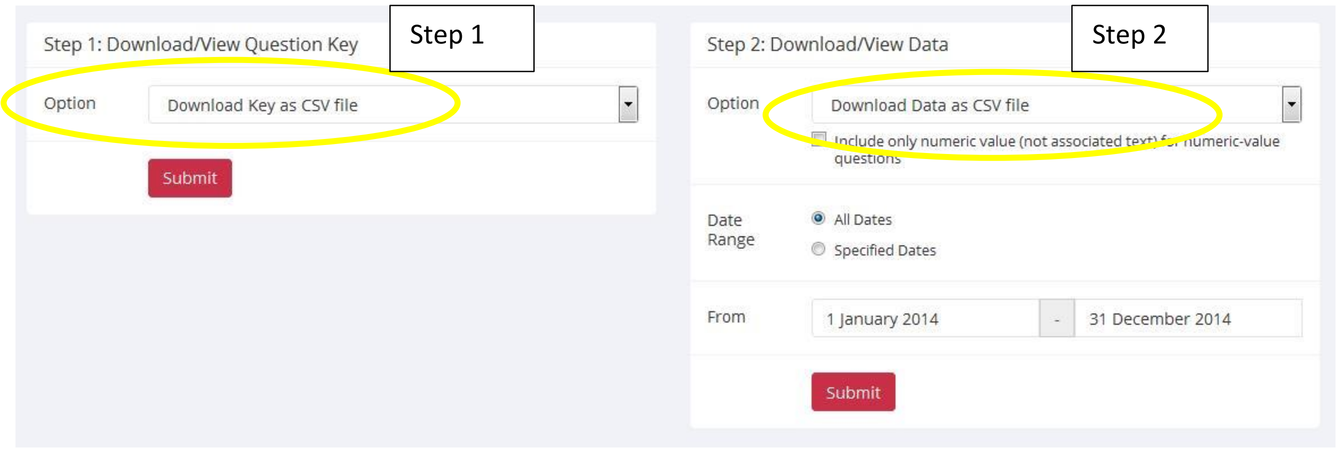


Figure 20

Repeat the process for **Download/View Data** as in **Step 2** above.

You should now have two data files that you can use in Excel or SPSS. For more information on how to do this refer to page 18

Setting up a Standard Study (Lab Based Study)

When using this method credit is not automatically awarded, therefore you must be aware that you will have to manually update the credits for your participants.

Click on **Add New Study→Standard Study→Continue** (Fig.17)

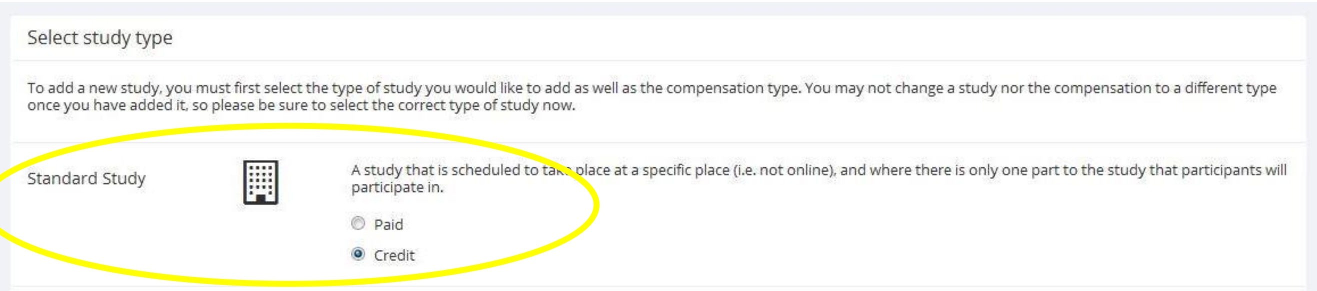


Figure 21

On the next screen you should complete the **Basic Study Information** as you would for the Online Survey (see page 18) ensuring that you enter **YES** into the **Hope ethics board Approval Code** field. Scroll down to complete any **Advanced Study Information** and under **Course Restrictions** move **FOP 2014/15** to the box on the right hand side of the screen.

Make sure that **Approved** and **Active Study** are set to **NO** and click **Add This Study**.

Creating Multiple Timeslots for a Standard Study

From the **Study Menu** select **View/Administer Timeslots→Add Multiple Timeslots**. There are a number of fields that need to be completed now.

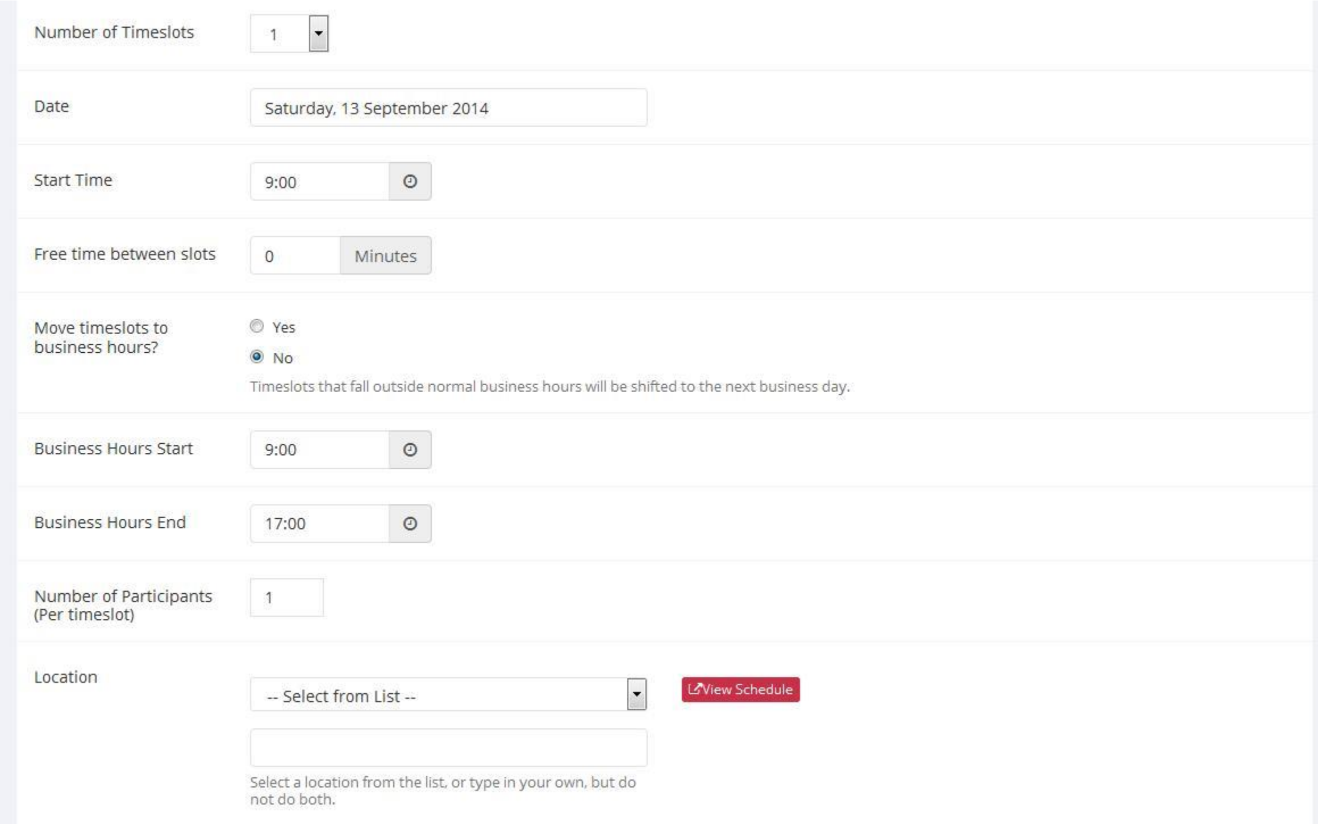


Figure 22

You can book a maximum of 20 timeslots for each location on any given day. However you should be mindful that other students will be completing their studies too and you should only book what you need. Once you have your requisite number of participants you should make sure that you delete any remaining timeslots that have been booked so that other students can use those rooms.

The options for bookable rooms are indicated below

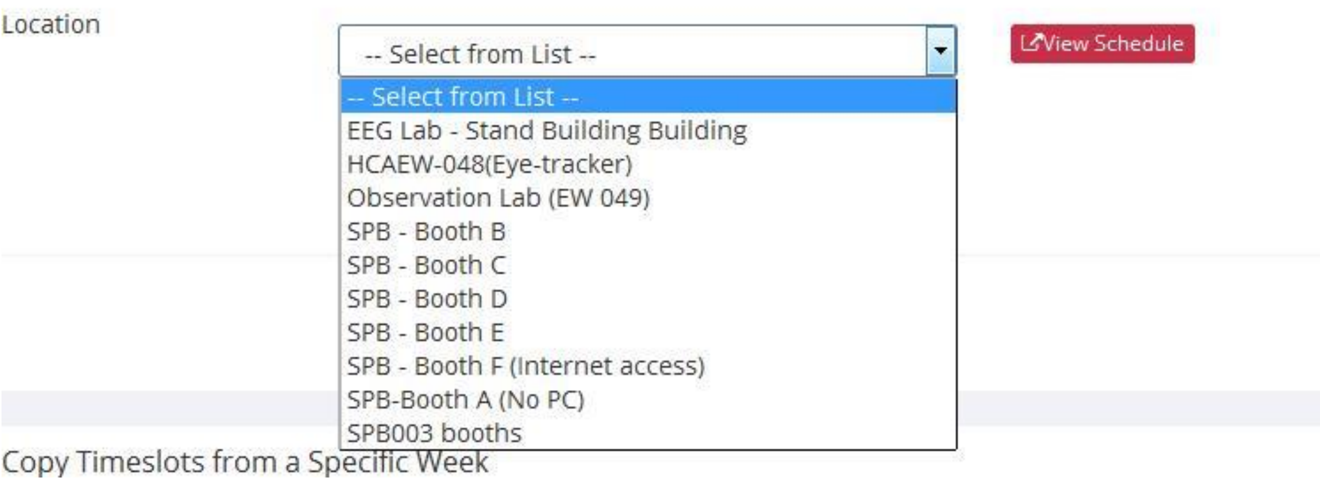


Figure 23

Example

So as an example your lab based E-Prime study will take 20 minutes to complete. You will need time to introduce your study and debrief at the end. This could take another 5 minutes. Therefore you should allow

25 minutes per participant per room. In order to allow for latecomers or your participants gathering up bags and coats then you should allocate some free time between slots, five minutes should suffice.

Assuming you want to test participants all day long in one booth, you would choose the following options

- **Number of time slots :** 16 (2 per hour from 9 am to 5pm)
- **Date:** As required
- **Start Time:** 9:00
- **Free time between slots:** 5 mins
- **Number of Participants per Timeslot:** 1
- **Location:** SPB – BoothB

Once you have selected your preferred options click **Add** and this will bring up a detailed schedule for you to check. At this stage you can opt to leave a gap, perhaps for a lunch break. When you are satisfied with your schedule you should press **Add Selected Timeslots**.

If you need to change any timeslots then you can go back into the system via **Study Menu→ View/Administer Timeslots→Modify.**

Manually Assigning Credit

For a **Standard Study** the researcher must manually assign credits for participation. To do this select your study and then **View/Administer Timeslots**, find the slot that the participant attended and click on **Modify**. The screen should look similar to that in Fig.24

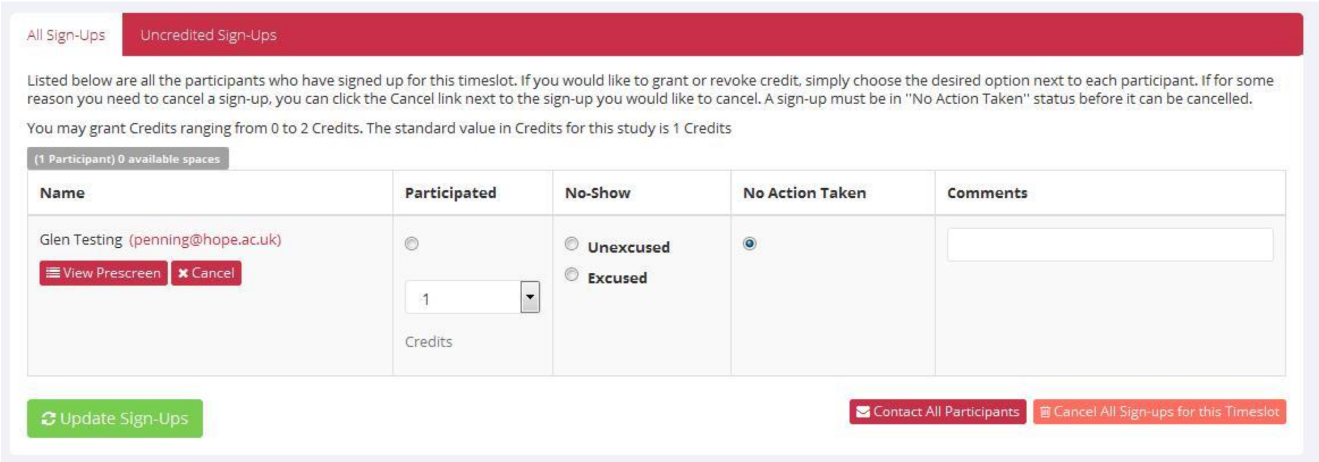


Figure 24

You should check the appropriate section where the choices are from **Participated, Unexcused, Excused**. You can also add a comment if necessary, then click **Update Sign-ups** to ensure that credit is awarded.

Batch Credit

On occasion you might want to grant batch credit a group of participants. From the **View All Timeslots** page find a timeslot that you can grant batch credit. Click on **Modify** and you will see the screen below.

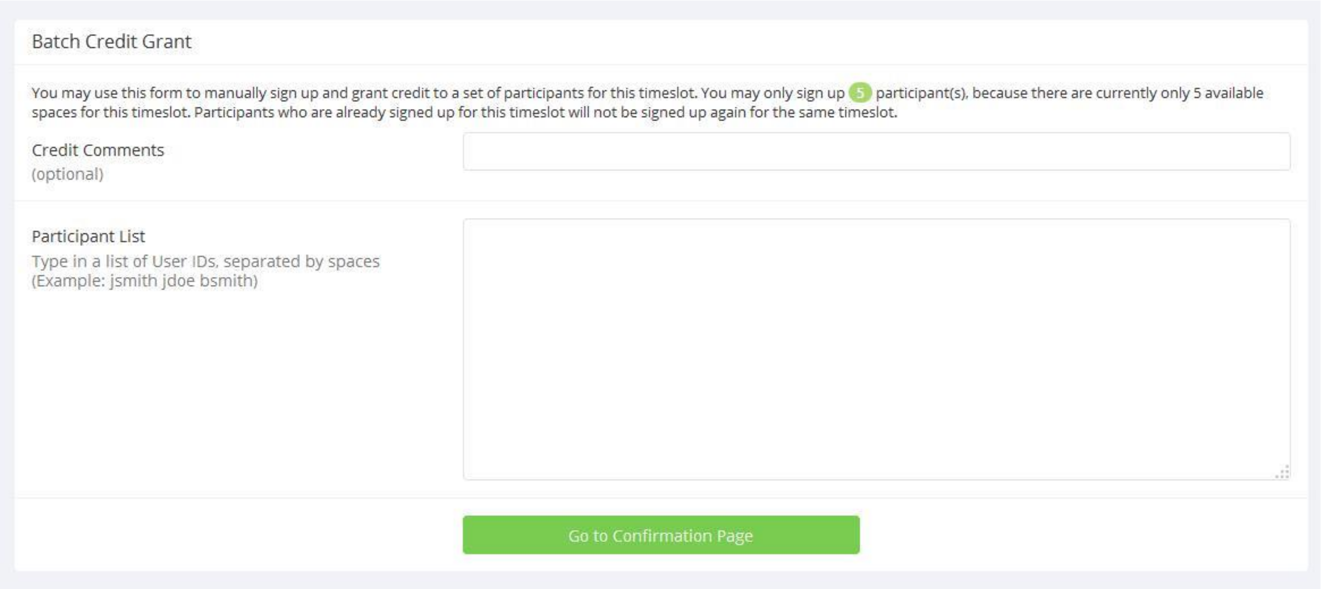


Figure 25

To grant batch credit you need the usernames of your participants and you simply type each one in, separated by a space. You will get a confirmation screen and click Proceed.

Batch credit will override any sign-up restrictions imposed. Also a batch credit will not work on participants that have already signed up. Batch credit should only be used on an ad hoc basis.

Deleting a Study

You can only delete a study if there have been no participants sign up for it. If you want to remove a study that has participants signed up you can choose to make it inactive in the **Study Menu→Change Study** Information section. To delete a study with no sign-ups go to **Study Menu→Delete Study**.

Importing into SPSS from a SONA based survey (NOT Survey Monkey)

Open IBM SPSS Statistics from Start→Programs

File→Open→Data from the files of type: drop down menu select *Text(*.txt, *.dat, *.csv)* and select the **survey_data** file and click **Open.**

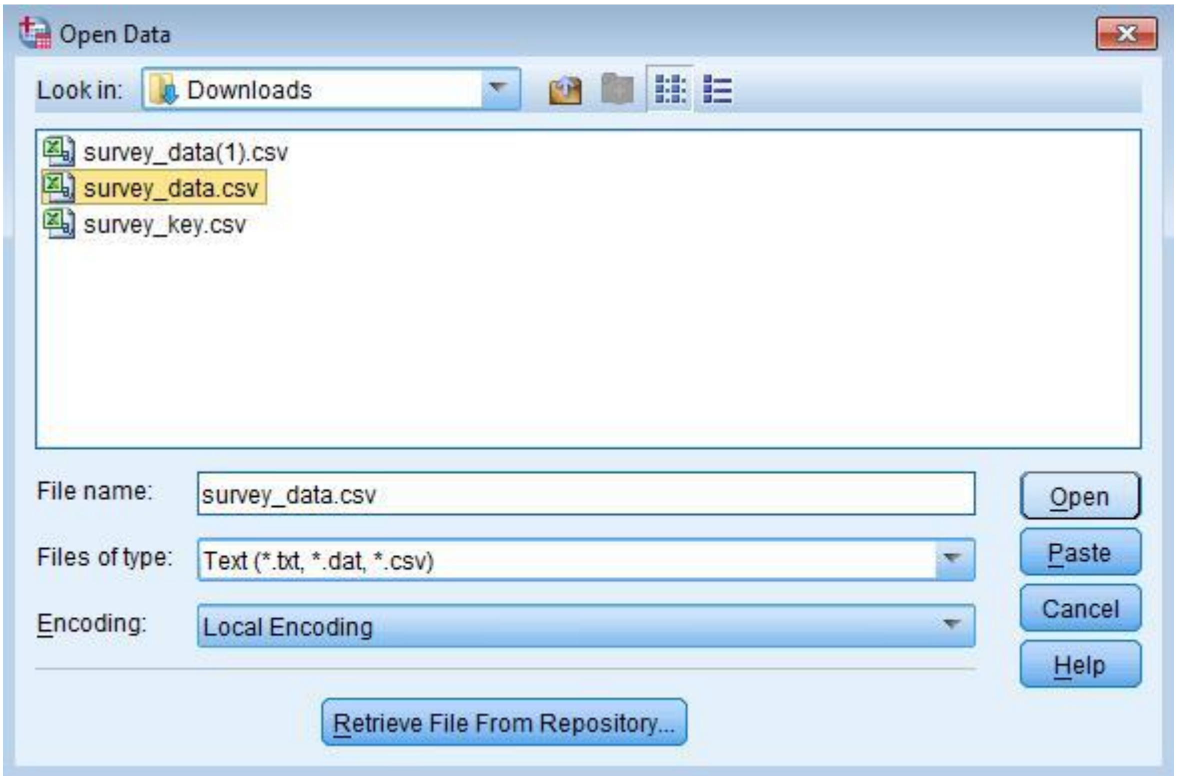


Figure 26

This will open up a **Text Import Wizard**. Follow the screens through clicking the circled sections.

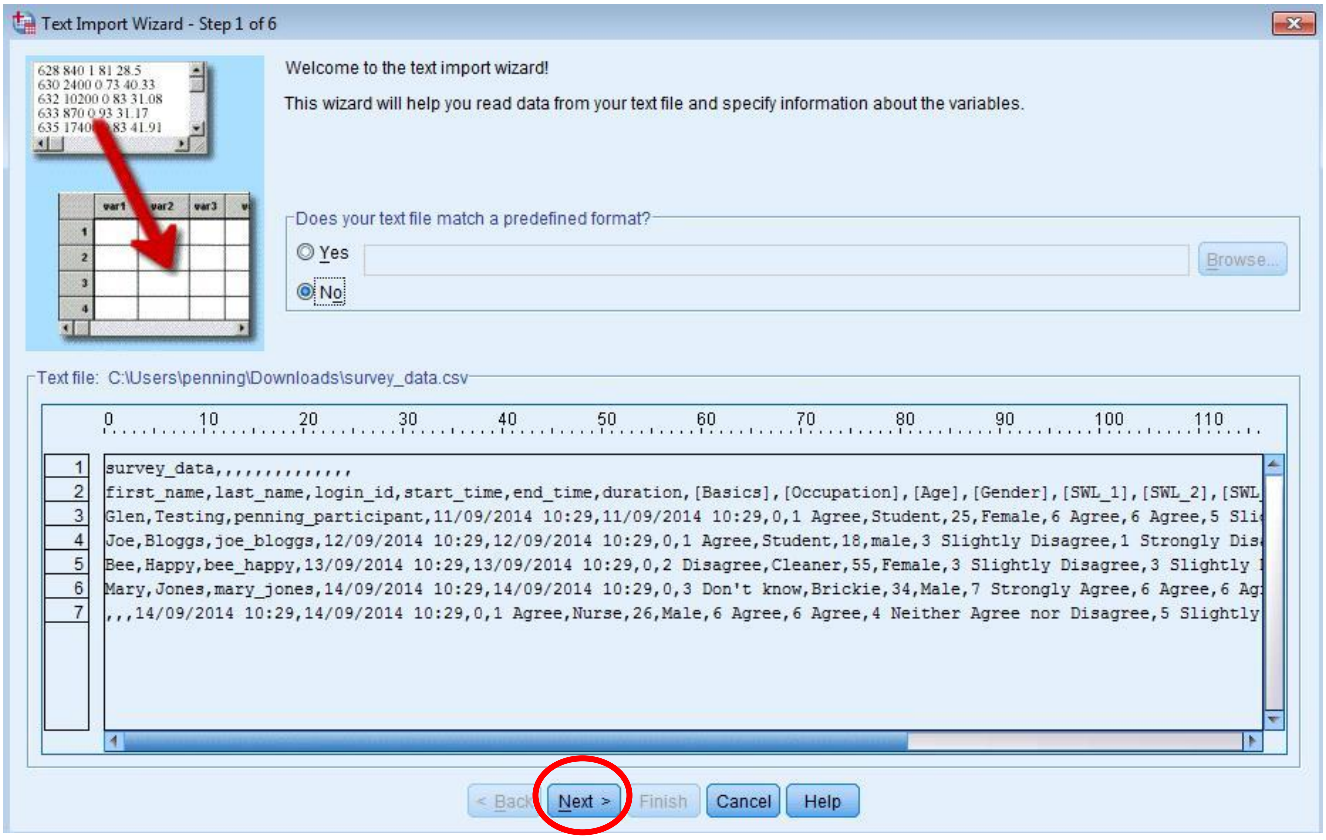


Figure 27

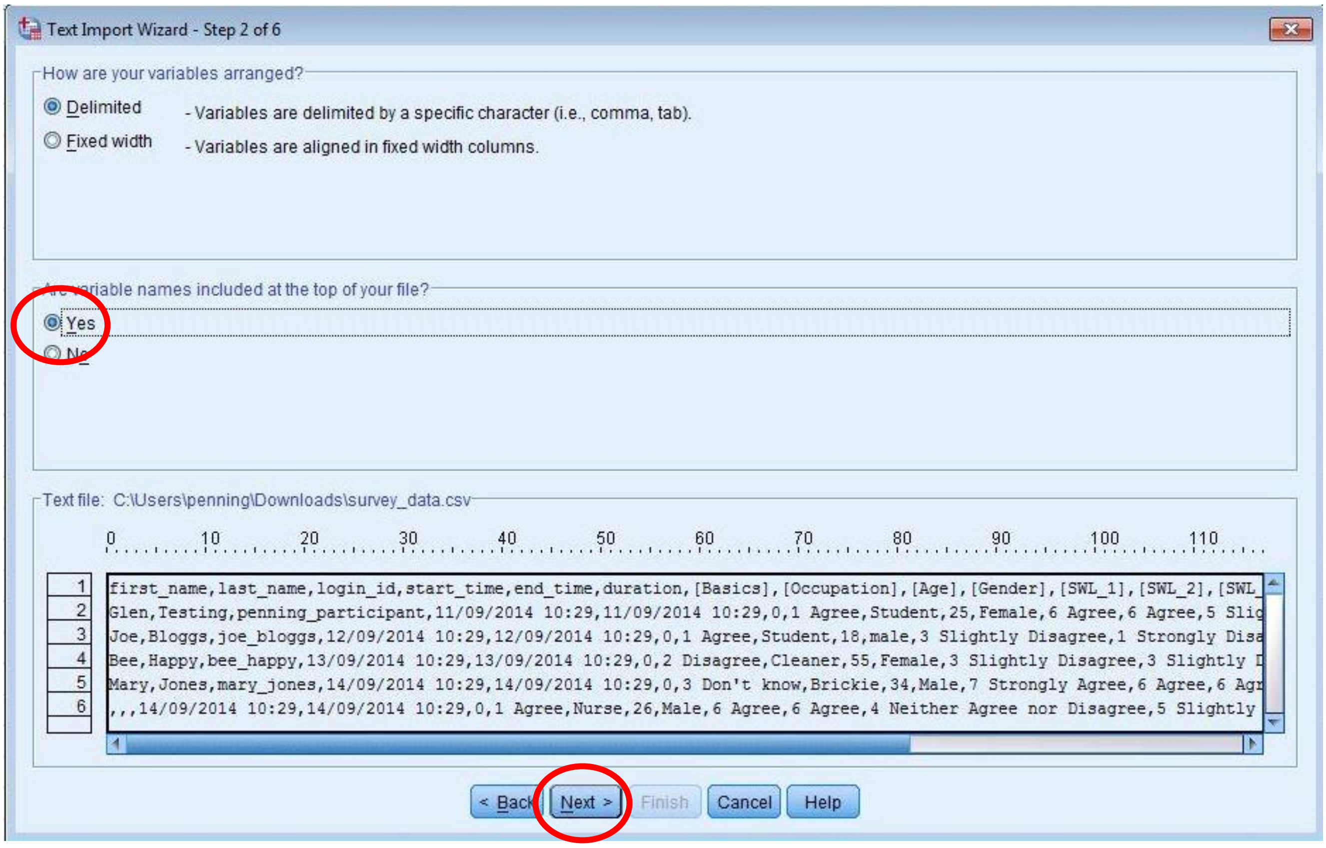


Figure 28

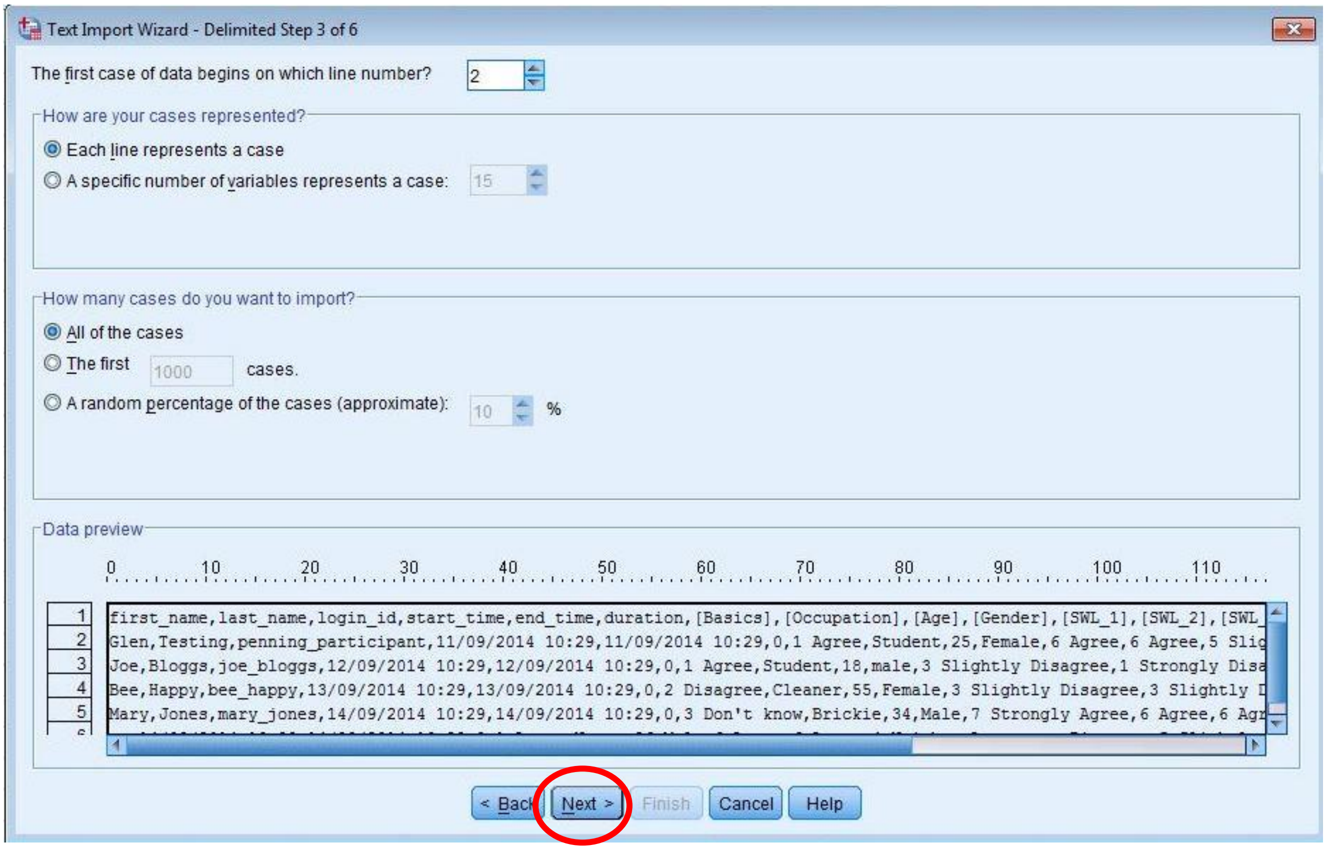


Figure 29

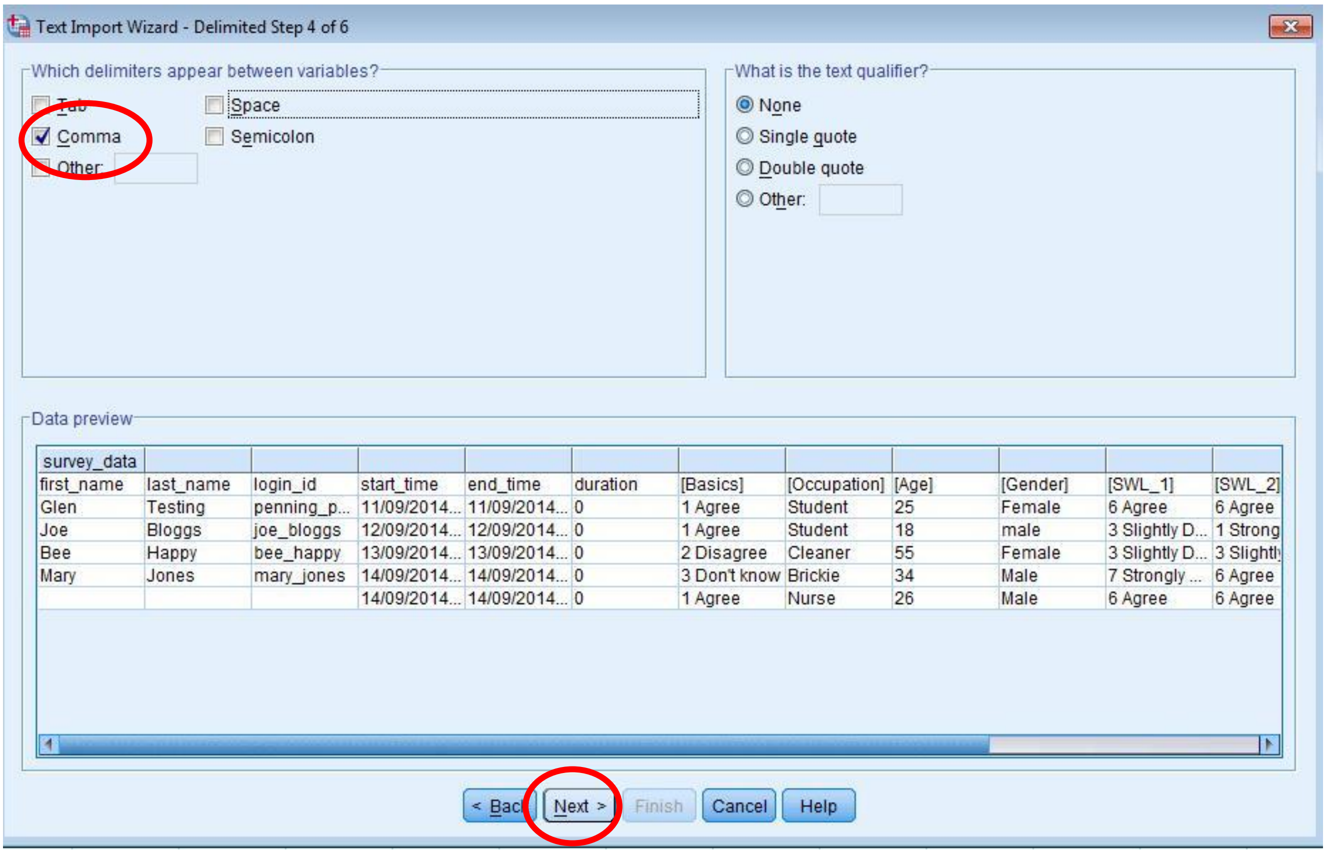


Figure 30

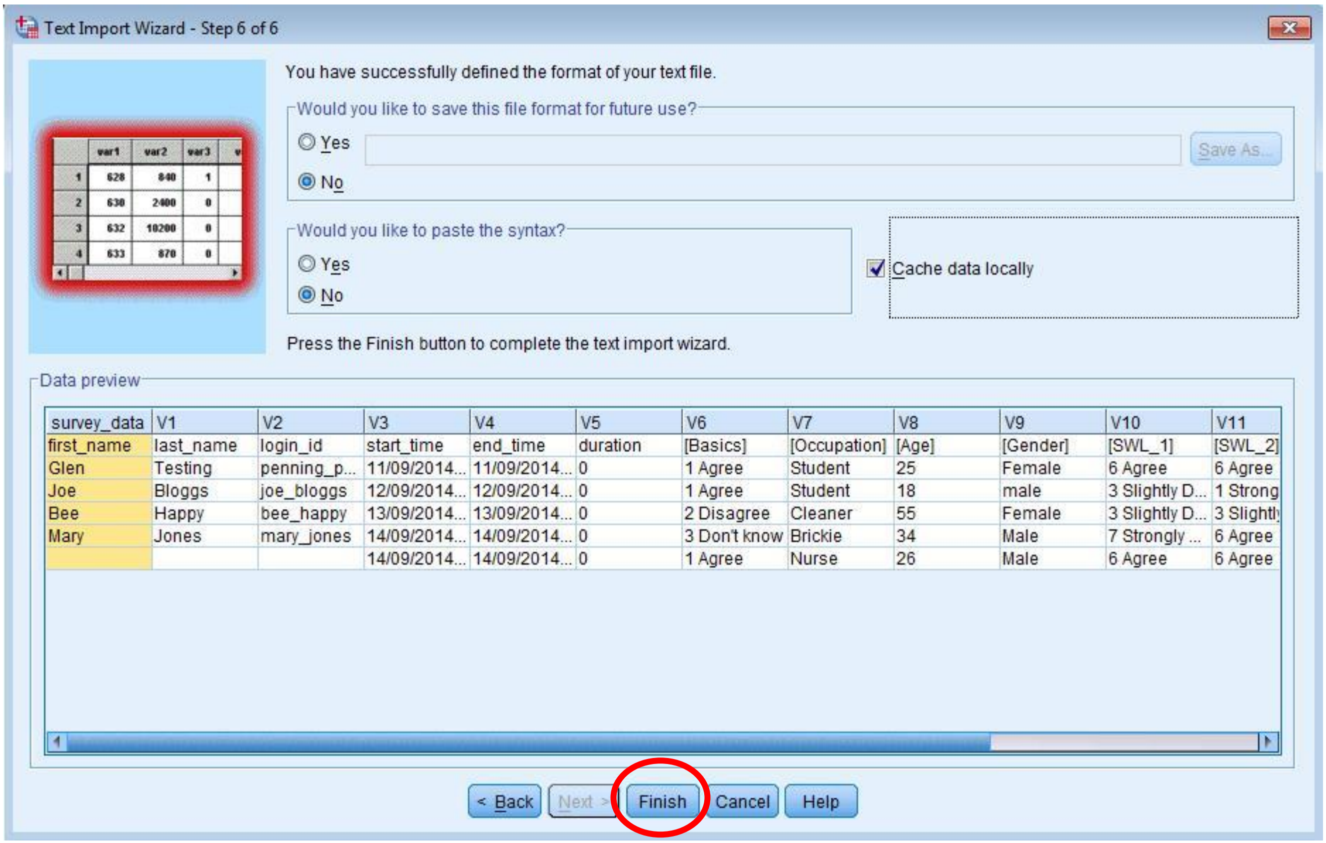


Figure 31

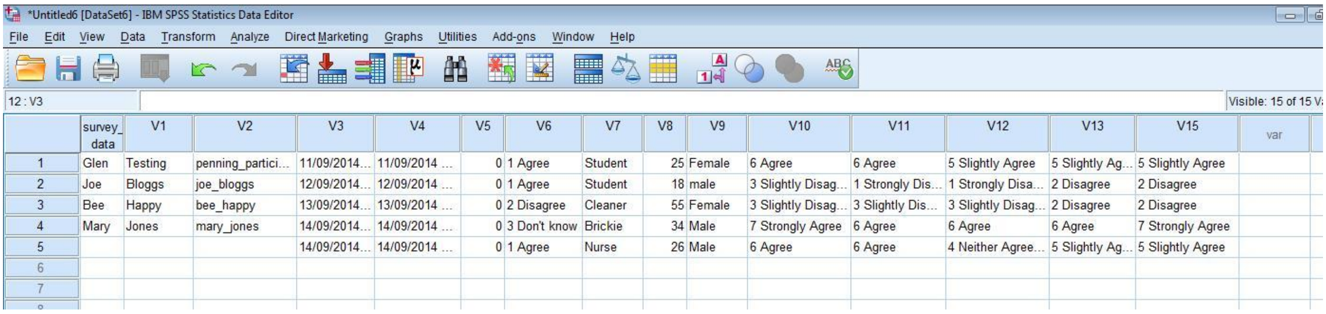


Figure 32

You can now rename your variables and ensure that the data is in the correct format. You may have to change the way the data is laid out depending upon the type of analyses you are doing.

You should refer back to your RMS 1 and 2 notes for this.