Announcement

In an effort to make life easier for XLab and Behavioral Lab users, we merged the websites for the Haas Behavioral Laboratory (haas.sona-systems.com) and the Experimental Social Science Lab (berkeley.sona-systems.com). The new URL is: http://berkeley.sona-systems.com

Those with Xlab accounts will have the same username and password. Behavioral Lab accounts will have the same usernames but will receive new password information via email. If you do not receive the new account password, please contact us at xlab_b-lab@berkeley.edu

Request Account

Forgot Password?
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What is Sona?

Sona is an online tool intended to help manage studies, participants, and compensation. On Sona, you can create timeslots for studies and track participation. To access Sona for XLab or Behavioral Lab studies, visit https://berkeley.sona-systems.com.

Sona User Information

Sona User Name

Researchers should contact the Behavioral Lab Coordinator to request a new account. Participants may request an account by going to the website and clicking “Request Account”. Students participating in the Research Participant Program for a class will have new logins created for them by the Behavioral Lab Coordinator.

Researcher Profile

It is recommended that Researchers provide their contact information such as an office location and phone number, since most human subject protection committees require this information to be made available to participants.

Creating a study

- To create a study click “Studies” “Add New Study”

- Select the type of study you would like to create
  *note using qualtrics is considered as an “Online External Study”

- Enter your study information
- All first time studies require to be approved by the administrator who will ensure that all fields are entered correctly

### Guidelines for Entering Study Information

<table>
<thead>
<tr>
<th>Study Name</th>
<th>Short, un-evocative, and uninformative. For Research Participant Program studies add UGBA105 + SEMESTER AND YEAR (for MORS) or UGBA106 + SEMESTER AND YEAR (for Marketing). For example: Group Decision Making UGBA105 Spring 2016</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brief Abstract</td>
<td>Participants can view the information listed here when they are viewing the list of all studies available. Include the following information: duration, location, and compensation.</td>
</tr>
<tr>
<td>Detailed Description</td>
<td>This information is displayed when the participant clicks on the study. Include if the study is expected to Not be on “Berkeley Time”, if participants need to arrive early for check-in, study duration, location, and compensation.</td>
</tr>
<tr>
<td>Eligibility Requirements</td>
<td>These will show when participants view available studies. List anything you require of your participants that is beyond the pre-screen, (i.e. left-handed or has a texting plan etc). Sona does not enforce these requirements. The student is responsible and accountable for their eligibility.</td>
</tr>
<tr>
<td>Pre-Requisites</td>
<td>If there are studies a participant must have participated in before, choose them here.</td>
</tr>
<tr>
<td>Disqualifiers</td>
<td>If there are any studies a participant must not have participated in, please select them here. It is good practice to also include this information in your study description because participants want to know why they do not qualify. If do not want participants who have participated in studies with deception, select studies that have * in their study names.</td>
</tr>
<tr>
<td>Course</td>
<td>For RPP choose UGBA105, UGBA106. For paid study choose Paid Pool. If you do not</td>
</tr>
<tr>
<td><strong>Restrictions</strong></td>
<td><em>restrict</em> a course, all students will be able to sign up, e.g. paid students will sign up for a course credit study.</td>
</tr>
<tr>
<td>----------------</td>
<td>----------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Duration</strong></td>
<td>Studies for course credit are only ½ or 1h long. Do not post a 50 minutes study to gain unfair advantage over 1h long studies. All such studies will be deleted. Paid studies may be of any length and any payment. Studies are compensated on average at $15/h or $10/30 minutes.</td>
</tr>
<tr>
<td><strong>Preparation</strong></td>
<td>Enter any advanced preparation a participant must do here (e.g. “do not eat 2 hours before session”).</td>
</tr>
<tr>
<td><strong>Invitation Code</strong></td>
<td>Participants must know the invitation code to sign up for this study. This is often used if the researcher wants to personally select participants, so the researcher only provides the invitation code to the desired participants.</td>
</tr>
<tr>
<td><strong>Is this a web-based study?</strong></td>
<td>If you have set up the study on another website, such as Qualtrics, you should note the study is administered outside the system.</td>
</tr>
</tbody>
</table>
| **Study URL** | Paste your survey link here.  
1. On Sona, click Studies / Add New / Online External Study, and paste your survey link under *Is this a web-based study?* |
| **Credits/Pay** | Studies are compensated on average at $15/h or $10/30 minutes.  
A study cannot not be switched between credit and payment. If you are running the same study with course credit and then with paid participants, you have to create another study.  
Course credit studies are 1/2h or 1h in length. |
| **Researchers** | Select the researcher for this study. Most likely, this is you, and your name will automatically be selected. If you are a researcher, then you may not change who the researcher is (the P.I. for the study, as well as the administrator, can change this). If you specify multiple researchers, each researcher has full control over the study. |
| **Principal Investigator** | Enter the Principal Investigator. |
| **IRB Approval Code** | Enter the IRB/ CPHS approval code here. This field is required and displayed to the administrator to help keep track of studies. |
| **Approved?** | Ensure you have received the necessary approvals (administrator, CPHS) to run the study before choosing Yes. A study must be Approved and Active to show up on the list of studies which participants may sign up for. |
| **Active Study** | The reason to select No is if the study is being kept for historical purposes, but should not show up to participants on the list of studies they may sign up for. Often, this is done so the system can enforce cases, where the inactive study is a pre-requisite or restriction for an active study. |
| **Notification when a participant signs up or cancels?** | 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. |
| **Researchers at Timeslot-Level** | If set to Yes, it will be possible to assign a specific researcher (from the list of researchers for the study) to a timeslot. If set to No, then it is assumed that all researchers (assigned to the study) are responsible for all timeslots. |
| **Automatic Credit Granting** | Credit will be granted automatically to participant X amount of hours after the experiment. This can be used for both online and in-lab studies. Regardless of no-shows or people not completing the online studies, the credit will be granted. Be sure to update manually for those who do not show up or complete online task. |
| **Private Comments** | These notes are only visible to the researchers for this study, and not to participants. *Indicate here if the study involves deception* |
| **Research Alternative?** | Some participants, for various reasons (typically for accruing too many unexcused no-shows), may be restricted such that they can only sign up for research alternative studies. Only an administrator may change this value (the default is No). |
| **Participant** | This deadline is the minimum hours in advance the participant can sign up for any
<table>
<thead>
<tr>
<th><strong>Sign-Up Deadline</strong></th>
<th>given study session.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Cancellation Deadline</strong></td>
<td>24 hours before start of the study session</td>
</tr>
</tbody>
</table>

**Formatting Your Study Description:**

To use functions such as **bold**, *italics*, _underline_ and space breaks, you will need to use basic html functions such as:

```
<b> bold </b>
<i> italics </i>
<u>underline </u>
<br> break
<center> centered text </center>
<p> paragraph
```

Example:

**In order to have your description be viewed as**

```
Description
YOU MAY COMPLETE THE SURVEY NOW, THE TIMESLOT ONLY SHOWS THE DEADLINE.
In order to see images throughout the survey, please use a computer instead of a cellphone.
At the end of the survey, please wait to be redirected back to Sona.
Data will be linked to later experiments through codes. The first page is the Informed Consent Form that you can sign electronically by clicking on "Yes, I agree".
This is a study conducted by the Haas School, not by the researcher(s) personally.
To participate in the study, click the green "view time slots for this study" button at the bottom of this page and follow the instructions provided. After signing up for a timeslot, you will see a blue "complete survey now" link. Click on the link to participate in the study immediately after signing up. At the end of the survey, please wait for a couple of seconds for the software to grant credit on Sona.
```

Your html code must be included:

Description:

<font color="red">YOU MAY COMPLETE THE SURVEY NOW, THE TIMESLOT ONLY SHOWS THE DEADLINE.</font>

In order to see images throughout the survey, please use a computer instead of a cellphone.

At the end of the survey, please wait to be redirected back to Sona.

Data will be linked to later experiments through codes. The first page is the Informed Consent Form that you can sign electronically by clicking on "Yes, I agree".
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Studies involving Deception:

If your study involves deception as defined by UC Berkeley’s CPHS, add a comment under Private Comments in your study information page. For example:

“This study involves deception”.

Prescreen for Participation and Restrictions

When participants first login to Sona they fill out a prescreen survey. If your study requires certain restrictions, you can set your study such that only participants who meet your requirements can sign up for your study. Participants are unaware that such restrictions are placed - if they do not qualify they will not see the study.

To set restrictions, view (do not choose edit) your study and choose View/Modify Restrictions. You will see a list of eligible questions which you may use for your restrictions. Choose the questions you would like to restrict upon and on the subsequent page, you can select each value that is acceptable for each question you have chosen. You may also use Analyzing Prescreen Responses to get an idea of how many participants qualify for participation.
If you change the restrictions, it will not remove the study sign-ups for participants who qualified earlier. If you want to prescreen participants based on new criteria, state them in the study eligibility requirements but unqualified students will still be able to see the study and accidentally sign up.

**Automatic Credit Granting in Qualtrics**

1) In Qualtrics, copy your survey URL
2) Paste your Qualtrics URL in SONA Study Information page under “Study URL”
3) Add &id=%SURVEY_CODE%
4) Click “Add This Study”
   a. In your Study Information Page, copy the Qualtrics Redirect to a URL
5) In Qualtrics go to Survey Options and in the box “Survey Termination” select Redirect to a Full URL and paste the URL you copied in SONA (see step 4). Save Changes.

6) Then in Qualtrics go to Survey Flow and click “Add a New Element Here” at the end of survey flow and select “End of Survey”
   a. Click “Customize” then select Override Survey Options.
   b. Select Redirect to a URL and paste the URL you copied from SONA in Step 4. Click Ok

- I recommend testing it before inviting participants. If it works correctly then students will be redirected back to SONA and see:
Embedding Person ID in Qualtrics

1) In Qualtrics go to Survey Flow and click “Add a New Element Here”
   a. Select Embedded Data
   b. Enter “id” and save flow

2) In Qualtrics under Survey flow the “Set Embedded Data” box, move it to the beginning of the survey and Save Flow.
3) In Qualtrics you will see a field called “id” that is the Person ID

<table>
<thead>
<tr>
<th></th>
<th></th>
<th>Q1</th>
<th>Q2</th>
</tr>
</thead>
<tbody>
<tr>
<td>V10</td>
<td>id</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finished</td>
<td>id</td>
<td>Consent</td>
<td>Name</td>
</tr>
<tr>
<td>1</td>
<td>35541</td>
<td>1 Jaya</td>
<td></td>
</tr>
</tbody>
</table>

Managing Timeslots

Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study. You can specify a date, time, location, maximum number of participants, and researcher for a session. Participants cannot see how many people have signed up for a timeslot, nor how many spaces are available for a timeslot.

Timeslots Linked to Specific Researchers

The study itself must be configured to allow researchers to be linked to specific timeslots, and the study must have more than one researcher connected to it. The two options are: 1. to link one researcher or 2. link all researchers to the timeslot. If a researcher is removed from a study, then any timeslots that were linked to them for that study will be changed so all researchers (for the study) are now responsible for those timeslots. This is done primarily for organization purposes, and has no effect on who can view and modify the study, or any timeslots for that study. This feature is useful when there are a number of researchers running a study, and researchers are responsible for running specific timeslots. If a timeslot has a specific researcher linked to it, then only that researcher will be listed as the contact point when a participant receives any emails and only that researcher will receive related notification emails, such as participant cancellation notification, and reminder emails (assuming such emails are enabled).

To Add a Timeslot

* Note: make sure you have the space reserved at the desired time in BLab before creating a timeslot

1. Click on the study that you would like to add a timeslot for. On the bottom of the screen, click on “View/Administer Time Slots”.
2. On the next page at the top, click “Add a Timeslot” or “Add Multiple Timeslots.”
3. On the next screen, fill in the required information.
   a. For multiple timeslots: the number of timeslots indicates the number of 1 hour or 30 minute time slots. You can select large number here and then delete them on the next page before you confirm the creation of the sessions.
4. Click “Add” to go to the confirmation page. After checking to make sure all information is correct, click “Add Selected Timeslots” to confirm.

5. Email behavioral_lab@berkeley.edu so the administrator can make an announcement to the pool.
   * It is suggested to over recruit for paid studies. For example, if you need 6 participants, recruit at least 8 and give the over recruited participants $5 show-up fee. This is to account for no-show participants.

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**Add Timeslots : Human Interaction**

Use this page to add a single timeslot for your study. You may also add multiple timeslots at once.

**Date**

Thursday, June 18, 2015

**Start Time**

3:00 PM

**End Time**

30 minutes after start time

**Number of Participants**

2

**Location**

Behavioral lab Waiting room, F503

Select a location from the list, or type in your own, but do not do both.

**Add This Timeslot**

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**Modifying Timeslots**

1. On the Timeslots screen, click “Modify” next to the timeslot you want to change.
   - You can also view the sign-ups on this page.

2. Make changes as needed and click “Update”.
   - Participants will not be notified of changes made to the timeslot. Please contact them if necessary. (e.g. change of location).
   - If there are already X amount of people signed up, you cannot change the size of the timeslot to an amount lower than X.
To Delete a Timeslot

1. On the Timeslots screen, click “Delete Multiple Timeslots”.
2. Select the sessions you want to delete.
   ➢ You cannot delete a timeslot with participants signed up.
3. Click “Delete Selected Timeslots” to confirm.

Timeslot Change Tracking
The system automatically tracks certain changes to a timeslot, including:
➢ Key information (date, time, etc.)
➢ Manual sign-up or cancellation (i.e., not a sign-up or cancellation done by the participant).
To see this information, choose the View Timeslot Modification Log when viewing a timeslot.

Using the Invitation Code
- You can restrict who signs up by requiring an invitation code for your study. To add the invitation code of your choosing, enter your code in the study information page under “Invitation Code”
- Note that ANYONE who has the code can sign up for the study.
  o If a participant who received the invitation code from the researcher sends the invitation code to another participant who you did not send the code to, they can sign up.
I recommend checking that the person who signs up for your study is on the list of people who sent the invitation code.

Participants will see this information:

<table>
<thead>
<tr>
<th>Study Information</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Study Name</strong></td>
</tr>
<tr>
<td><strong>Study Type</strong></td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td><strong>Credits</strong></td>
</tr>
<tr>
<td><strong>Duration</strong></td>
</tr>
<tr>
<td><strong>Website</strong></td>
</tr>
<tr>
<td><strong>Invitation Code</strong></td>
</tr>
<tr>
<td><strong>Researcher</strong></td>
</tr>
<tr>
<td><strong>Principal Investigator</strong></td>
</tr>
</tbody>
</table>

[View Time Slots for This Study]
To participate in the study the student will have to select “View Time Slots for this Study” and be prompted to enter in the code. Once they enter in the code they can select to complete the survey or select the timeslot for in lab study.

Manual Sign-Up and Cancellation

You may manually sign up participants for your study. For example:

➢ If the participant happens to show up for a timeslot they were not signed up for, you can sign them up on the spot.
➢ If a participant wants to participate in an upcoming session but the system says it is too late for them to sign up, you can do so manually.

In rare cases you may need to manually cancel a sign up. For example:

➢ If a participant has mistakenly signed up for a timeslot on the wrong day and cannot cancel 24 hours prior to the study.

How to Manually sign up:

1. Choose the desired study and timeslot
2. Click “Modify”
3. At the bottom of the page, enter their user ID or last name.
   ➢ You will see a confirmation page that also lists any restrictions on the study.
4. Choose “Sign Up” to complete.

How to Manually Cancel a Sign Up:

1. Choose the desired study and timeslot
2. Click Cancel next to their name
3. The participant will be sent an email about the cancellation (and who performed it), along with a confirmation code. It is mandatory to enter reasons for the cancellation. The administrator will also receive a copy of this cancellation email.
If not enabled, your administrator can still perform a manual sign-up.

**Granting Credit**

*It is important that researchers grant credit in a timely manner*

1. Select the desired study and timeslot
2. Click “Modify”
3. Click “Credit Granted” for the participants that were present
4. For no-shows you can select their no-show as excused or unexcused
   *You may also grant 0 credits if you do not want to grant credit but you also want to prevent them from participating in the study again.
Excused no-show/ unexcused no-show policy

Excused no-shows are for:

1. Participants that did not cancel their study session 24hrs in advance and did not contact the researcher due to extenuating circumstances.
2. Participants that were too late to the study and could not participate due to extenuating circumstances.
   * Note it is helpful to add notes in the comment section of the credit section. Such as: “participant emailed to cancel study”, “participant was late”

Unexcused no-shows are for:

1. Participant did not show up to the study nor did they contact the researcher before the study.

Emailing Participants

- Participants receive an automatic reminder email a day before their scheduled participation date.
- To email the group of participants for a different reason such as:
  0 Reminding participants of specific instructions such as to not eat 2 hours before the study session

1. Choose a study and a timeslot for the participants you want to contact.
2. Click “Modify” for the specified timeslot.
3. Click “Contact All Participants” at the bottom of the page.
4. Write and send your message.
   ➢ The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to.
   ➢ To ensure the email feature is not being abused:
     Summary information (the message and how many recipients it was sent to) will be logged and sent to the administrator.
Resources

➢ Behavioral Lab Coordinator: behavioral_lab@berkeley.edu
➢ Sona Tutorial for Researchers: https://www.youtube.com/watch?v=ec8S3xfO-a8