



Psychology Resources



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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 internet. 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.

There are two main methods that you can use to create a study and recruit participants using SONA and some of the other resources the Department has made available to students

1. **Standard Study:** This is a study that will be undertaken face to face in the Psychology Labs in the Health Sciences Building
2. **Online External Study:** These will be completed by participants online using PsychoPy Builder and Pavlovia, or using Qualtrics

GETTING STARTED

All undergraduate students are allocated a SONA account at the beginning of Level C, and when you reach Level H, your account is upgraded to a Researcher account. Your account is part of the single sign on system, which means that you always log in with your Hope credentials.

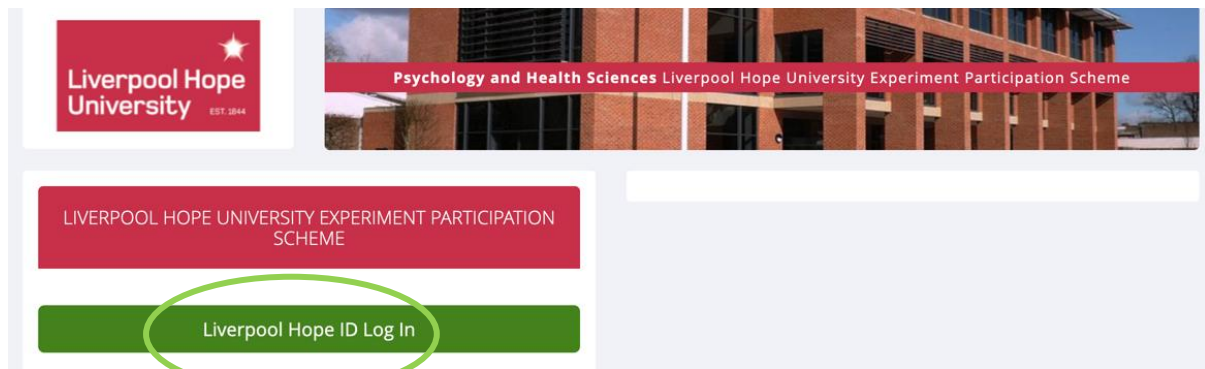
At the beginning of Level C you will receive an email with your log on information and you can now login to the system. Type the following into the address bar of your browser and press enter.

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

This will take you to the Sona Login screen. Type your **Hope User ID** and **password** in their respective fields and click **Log In** (see Figure 1)

The first time you log in as a researcher you will be asked to acknowledge the ethics policies.

Figure 1



ADDING A STANDARD STUDY

1. To add a new lab-based study, you should click Add New Study. You will then see a screen with multiple options available. Most lab-based studies will be under the heading Standard Study and using this option you can also conduct research via Zoom conferencing. (Figure 2 & 3)

Figure 2

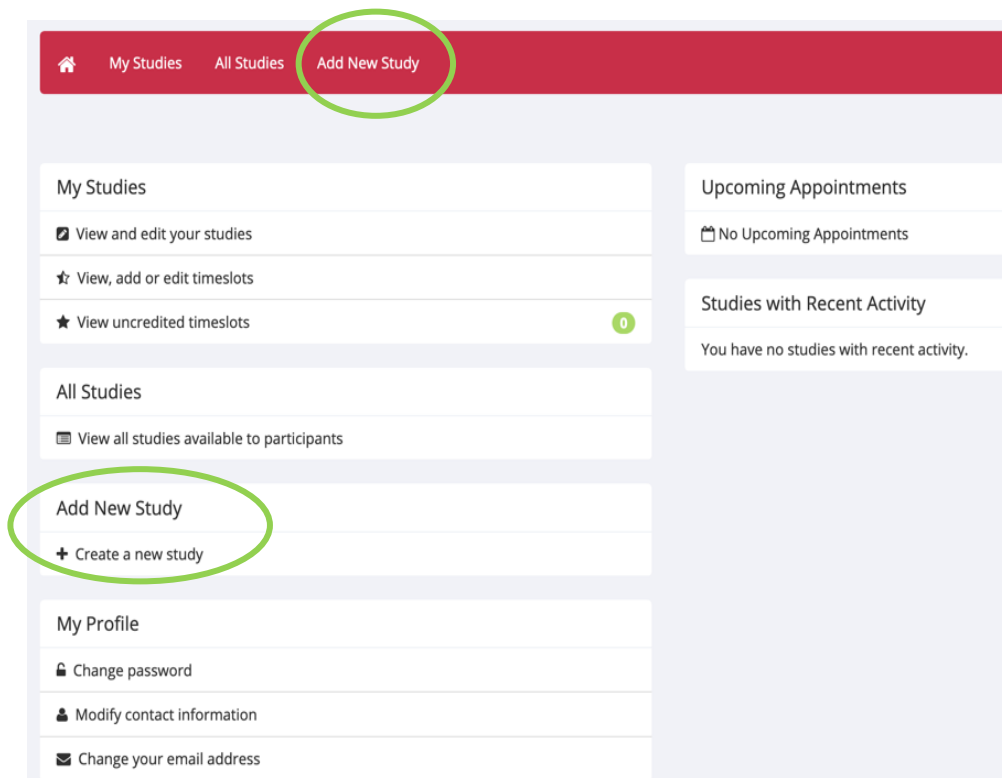





Figure 3

Select Study Type

To add a new study, you must first select the type of study you would like to add. You may not change the study type once you have added it, so please be sure to select the correct option now.

 If you are conducting your study over **videoconference**, like Zoom, Webex, or a similar tool, set it up as either a Standard Study or a Multi-Part Standard Study.


Standard Study  A study that is scheduled to take place at a specific time, in a specific place or over videoconference, and where there is only one part to the study that participants will participate in.


Multi-Part Standard Study  A study that is scheduled to take place at a specific time, in a specific place or over videoconference, in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time.

Two-Part

Three-Part

Four-Part

Online External Study  An online study located on another website like Qualtrics, SurveyMonkey, or any other website.

Multi-Part Online External Study  An online study located on another website like Qualtrics, SurveyMonkey, or any other website, in multiple parts. The different parts may be scheduled to take place a specified number of days apart, and a participant must sign up for all parts of the study at one time.

Two-Part

Three-Part

Four-Part

2. On the following screen you need to edit a number of settings carefully to ensure that the study is set up correctly (Figure 5)
 - a. Study name – keep it short and representative of the research being undertaken
 - b. Brief Abstract – Max 255 characters
 - c. Detailed information – copy and paste the Participant Information from your approved ethics form to this space
 - d. Eligibility Requirements – any necessary characteristics (e.g. females only etc.)
 - e. Duration – specify the number of minutes that your study will take
 - f. Credits – the number of credits you will award for the study. The strict rule is that each 15mins you can award 1 credit. Therefore, if a study is 45mins long you may award 3 credits. Do not overestimate the time that the study will take as an administrator will change the number of credits as this is unfair on other researchers
 - g. Preparation – anything a participant needs to do prior to the study
 - h. Researcher – select your own name from the list and move it across to the box on the right side
 - i. Principal Investigator – This should be your dissertation supervisor, move their name across
 - j. Approved – Only select Yes when you have your ethical approval

- k. Active Study - keep this value set to No until, you have completed all of the preparations for your study. Only when ready to test participants should you select Yes

Figure 4

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 **a**
(Participants see the list of studies in random order not alphabetical order.)

Brief Abstract **b**
(Up to 255 characters, optional)

Detailed Description **c**
(Up to 15,000 characters, optional)

Eligibility Requirements **d**

Duration (Minutes) **e**

Credits **f**
(Credits must be evenly divisible by 0.5)

Preparation **g**

Researcher **h**
 → Selected

Principal Investigator **h**

Hope Ethics Board Approval Code (optional)

Approved? **i** Yes No

Active Study? **j** 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)

DO NOT CLICK ADD STUDY YET, THERE ARE ADVANCED SETTINGS THAT NEED TO BE COMPLETED

3. In the Advanced Settings there are some key elements that must be completed
 - a. Prerequisites - In the Advanced settings (Figure 3), under prerequisites you should ONLY select studies if students must take part in another study before completing your study
 - b. Disqualifiers – your supervisor will inform you if you need to complete this box
 - c. Course Restrictions - **THIS IS IMPORTANT – IF YOU ARE A PSYCHOLOGY STUDENT, ONLY SELECT THE PSYCHOLOGY COURSES. DO NOT LEAVE THIS BLANK OR ADD THE SPORTS COURSES AS COURSE CREDITS WILL NOT BE ALLOCATED PROPERLY**
 - d. You may now click **Add Study**

Figure 5

Advanced Settings

Pre-Requisites

Participants must have signed up or completed ALL of these studies before they may sign up
 Participants must have signed up or completed AT LEAST ONE of these studies before they may sign up

My Studies All Studies

search...

Available Selected

Disqualifiers

Participants must **not** have completed or have a pending sign-up for ANY of these studies:

My Studies All Studies

search...

Available Selected

Course Restrictions

Participants must be in one of these courses:

- Psychology Level C
- Psychology Level H
- Psychology Level I
- SES Sport Science Level C
- Sport Level C
- Sport Level I

All Courses

Available Selected

Is this a web-based study? No

Study URL (optional)

Study URL (optional)

Participant Sign-Up Deadline 24 hours before study is to occur

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

ADDING TIMESLOTS FOR A STANDARD STUDY

- In order that you can advertise for participants you must add timeslots (Figure 6) 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.

Figure 6

The screenshot displays a web interface for managing a study. It is divided into several sections:

- Study Information:** A table with the following details:

Study Name	Does neuroticism effect identification of pleasant and unpleasant images?
Study Type	Standard (lab) study This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Study Status	Visible to participants : Approved Active study : Appears on list of available studies
Duration	30 minutes
Credits	2 Credits
Description	For this study, you will first be asked to complete 2 questionnaires measuring personality and well-being. Following this, you will be asked to complete an e-prime experiment where you will judge a series of images as pleasant, unpleasant or neutral.
- Additional Study Information:** A table with the following details:

Participant Sign-Up Deadline	24 hours before the study is to occur
Hope Ethics Board Approval Code	
Direct Study Link	https://liverpoolhope.sona-systems.com/default.. This is a direct URL for participants to access the study. You may use this in an email or study advertisement.
Date Created	4 February 2020
- Researcher Information:** A table with the following details:

Researcher	CERYS HESMONDHALGH
Principal Investigator	Julienne McGeough Office: 01512913907
- Study Menu:** A vertical list of options, with "View/Administer Time Slots" circled in green:
 - View/Administer Time Slots
 - Timeslot Usage Summary
 - Download Participant List
 - Contact Participants
 - View Bulk Mail Summary
 - Change Study Information
 - Check Study Configuration
 - Participant Study View
 - Study Modification Log
 - Copy Study

- You can book a maximum of 20 timeslots for each location on any given day using the **Multiple Timeslots** button (Figure 7). 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

Figure 7

The screenshot shows a web interface for managing study timeslots. At the top, there is a 'Study Menu' dropdown. Below it, a horizontal bar contains several action buttons: '+ Add A Timeslot', '+ Add Multiple Timeslots' (highlighted with a green circle), 'Delete Multiple Timeslots', and 'View Printer-Friendly List of Signups'. A 'Print' button is also visible. Below this bar is a navigation menu with tabs for 'All Timeslots', 'Recent Timeslots', 'Upcoming Timeslots', and 'Older Timeslots'. The main heading is 'Timeslots : A study into trustworthiness and criminal sentencing'. Below the heading, there is a section for 'Timeslots for this study are listed below, with any sign-ups listed below the timeslot.' To the right, there is a search box for available timeslots with a 'GO' button. A 'Fill Status' dropdown menu is set to 'All', with options for 'Full' and 'Open Spaces'.

- The options are reasonably straightforward to select the number of slots and the room that you wish to use. It is sensible to allow time between participants to avoid a backlog. Note you can also include a Zoom link if your study is to be conducted over Zoom

Figure 8

The screenshot shows a form for adding a new timeslot. The form is titled 'With either option, you will have an option to review the information before the timeslot addition is performed. Please choose one of the 2 options below:'. The form fields are: 'Number of Timeslots' (dropdown menu set to 1), 'Date' (text input field set to Monday, 24 February 2020), 'Start Time' (time picker set to 11:20), 'Free time between slots' (input field set to 0, with a 'Minutes' label), 'Location' (dropdown menu set to HSB003 Booth 04 (psych), with a 'View Schedule' button), 'Move timeslots to business hours?' (radio buttons for Yes and No, with 'No' selected), 'Business Hours Start' (time picker set to 09:00), 'Business Hours End' (time picker set to 17:00), and 'Number of Participants (Per timeslot)' (input field set to 2). A green 'Add' button is at the bottom.

GRANTING CREDITS, NO-SHOWS AND EXCUSING PARTICIPANTS

It is important to reward your Level C participants for their participation in your study. They must collect 25 credits as part of their RDA portfolio of work.

7. Click **View/Administer Timeslots** (Figure 6) and on the next screen click **Modify** (Figure 9)

Figure 9

Timeslots for this study are listed below, with any sign-ups listed below the timeslot.

Search for available timeslots on :

▼ Fill Status

Date	Participants Pool	Participants	Location	Modify
Wednesday, 9 June 2021 11:20 - 11:50	Signed Up: 1 Open Slots: 0 Total: 1	Status: Awaiting Action	HSB010 Cog Neuro Lab (psych)	<input type="button" value="Modify"/>
Wednesday, 9 June 2021 12:00 - 12:30	Signed Up: 1 Open Slots: 0 Total: 1	Status: Awaiting Action	HSB010 Cog Neuro Lab (psych)	<input type="button" value="Modify"/>

8. If the participant took part, you should award the credits, if they failed to show you can mark them as Unexcused (their account will be locked after 2 no shows) or if they contacted you to explain why they could not attend you may Excuse them (Figure 10)

Figure 10

All Sign-Ups **Uncredited Sign-Ups**

Listed below are all the participants who have signed up for this timeslot. If you would like to grant or revoke credit, simply choose the desired option next to each participant. If for some reason you need to cancel a sign-up, you can click the Cancel link next to the sign-up you would like to cancel. A sign-up must be in "No Action Taken" status before it can be cancelled. Comments will be visible to participants.

You may grant Credits ranging from 0 to 4 Credits. The standard value in Credits for this study is 2 Credits

(1 Participant) 0 available spaces

Name	Participated	No-Show	No Action Taken	Comments
<input type="button" value="Contact"/> <input type="button" value="Cancel"/>	<input type="radio"/> <input type="text" value="2"/> Credits	<input type="radio"/> Unexcused <input type="radio"/> Excused	<input checked="" type="radio"/>	<input type="text"/>

SETTING UP AN ONLINE EXTERNAL STUDY (QUALTRICS OR PAVLOVIA)

9. Follow [Step 1](#) to **Add a New Study**, then select **Online External Study**

Figure 11

The screenshot shows a form for adding a new study. At the top, there are three radio button options: 'Two-Part', 'Three-Part', and 'Four-Part'. Below these, the 'Online External Study' option is selected and circled in green. It is accompanied by a laptop icon and the text: 'An online study located on another website like Qualtrics, SurveyMonkey, Gorilla, PsychoPy (Pavlovian), REDCap, or any other website.' Below this, there is a section for 'Multi-Part Online External Study' with another set of radio button options for 'Two-Part', 'Three-Part', and 'Four-Part'. At the bottom of the form is a 'Continue' button with a right-pointing arrow.

22. Follow [Step 2 & Step 3](#) to complete the study information until you reach the section indicated in (Figure 13)

23. Before you continue to the specific information related to Qualtrics or Pavlovian you must add a timeslot. Follow the steps in Step 4, but you need only add one timeslot, with an end date when the study will close and the number of participants you hope to achieve

Figure 12

The screenshot shows the 'Study Menu' for a study titled 'A study into trustworthiness and criminal sentencing'. The menu includes buttons for '+ Add A Timeslot', '+ Add Multiple Timeslots', 'Delete Multiple Timeslots', and 'View Printer-Friendly List of Signups'. The '+ Add A Timeslot' button is circled in green. Below the menu are tabs for 'All Timeslots', 'Recent Timeslots', 'Upcoming Timeslots', and 'Older Timeslots'. The 'All Timeslots' tab is active. Below the tabs, there is a section for 'Timeslots for this study are listed below, with any sign-ups listed below the timeslot.' This section includes a 'Fill Status' dropdown menu with options 'All', 'Full', and 'Open Spaces'. To the right, there is a search box for available timeslots with a 'GO' button.

Figure 13

Is this a web-based study? Yes -- study is administered outside the system

a Should survey participants be identified only by a random, unique ID code? Yes
 No

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.
[Detailed Help](#)

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

Participant Sign-Up Deadline hours before study is to occur

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

10. Change (a) to Yes

11. 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://liverpoolhope.fra1.qualtrics.com/jfe/form/SV_dm9oidb7sdPGVme

then change it to

https://liverpoolhope.fra1.qualtrics.com/jfe/form/SV_dm9oidb7sdPGVme?id=%SURVEY_CODE% **(Note: "id" must be in lower-case)**

At this point you need to log in to your Qualtrics Survey

12. Create an embedded field named "id" in Qualtrics, by clicking on your project to open the **Survey tab** in the **Qualtrics Survey Builder** (Figure 14)

13. Click on the **Survey Flow** icon in the left-hand navigation bar.

14. Click **Add a New Element Here** to add a new Block to the Survey Flow (Figure 15)

Figure 14

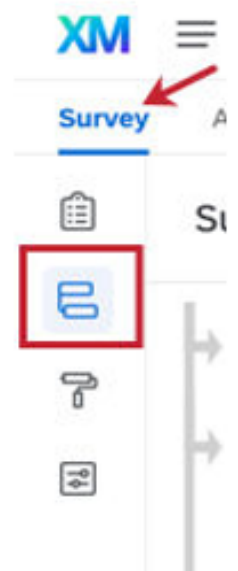
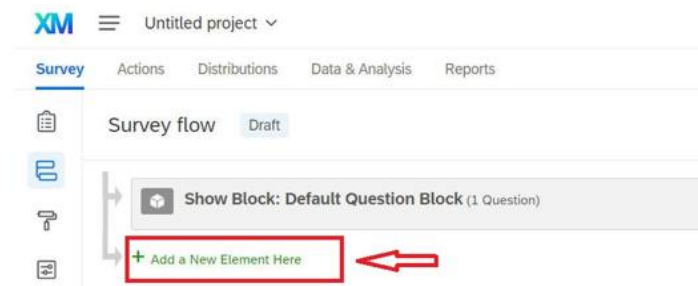
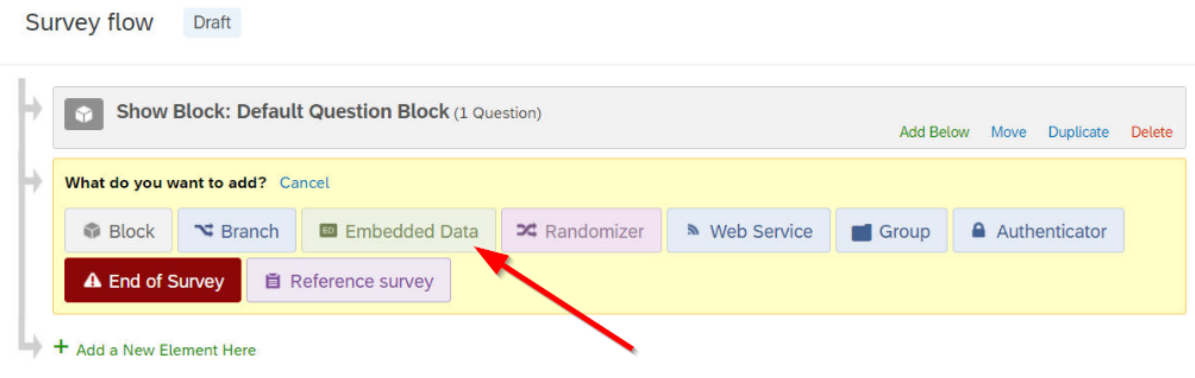


Figure 15



15. Select the **Embedded Data** option to add this element to your Survey Flow

Figure 16



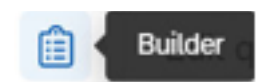
16. Click **Create New Field** and type "id" to create a new embedded field with this name
(make sure "id" is typed in lower-case)

17. Drag the cursor to the bottom right corner and click **Apply** to save your changes

18. Now you must edit **End of Survey to Redirect to Sona URL**. In Qualtrics, select the Builder icon to return to the Survey Builder

19. Scroll to the bottom of the **Survey Builder** and click the **End of Survey**. On the left under **Messaging**, open the dropdown menu and select the **Redirect to URL** option

Figure 18



20. Enter the **Qualtrics Redirect to a URL** value from the Study Information page on your **Sona Systems** site (you may simply copy and paste the unaltered value from Sona into Qualtrics - Figure 20)

Figure 20

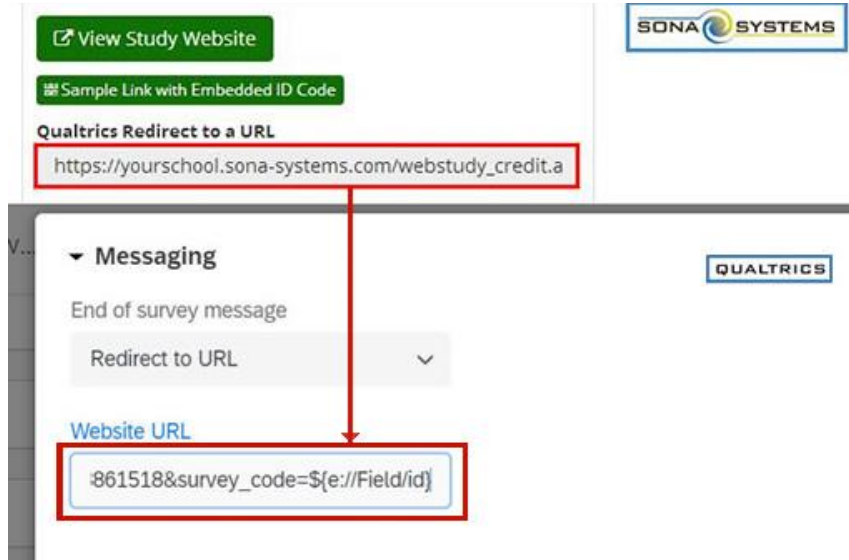
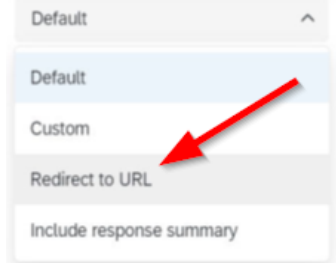


Figure 19

Edit end of survey

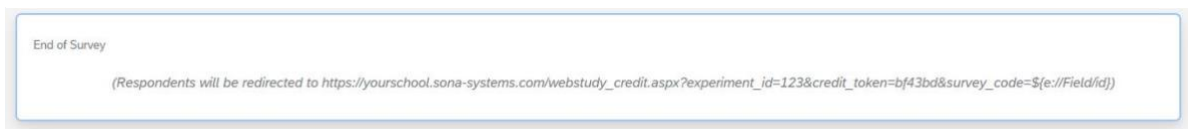
▼ Messaging

End of survey message



21. The **End of Survey** element in the **Question Block** display should now reflect the **Qualtrics Redirect to a URL** value.

Figure 21



FURTHER INFORMATION

These instructions are for the typical case of a single Qualtrics survey. If you are chaining together multiple Qualtrics surveys as part of a single Sona study, review the [Qualtrics Chaining Help Page](#).

The Integration Testing Instructions can be [found here](#)

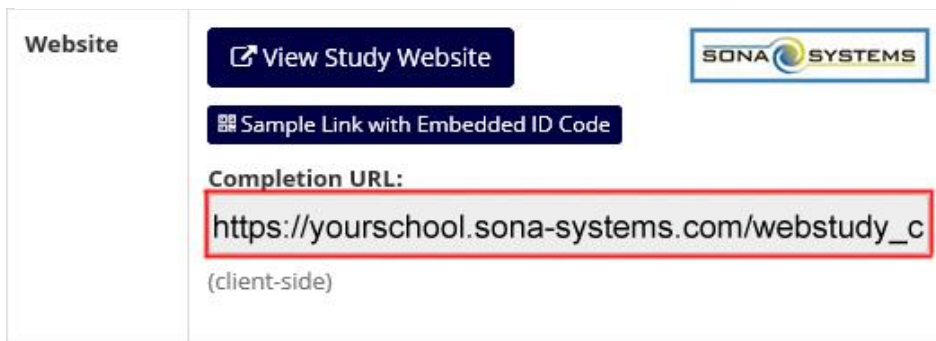
These features are described on Qualtrics' site at the following URL:

("Passing Information Through Query Strings")

<https://www.qualtrics.com/support/integrations/api-integration/passing-information-through-query-strings/>

22. On your Sona Systems site, change the **Study URL** so it includes **?participant=%SURVEY_CODE%** in the URL. So, if the PsychoPy URL is:
<https://run.pavlovia.org/yoda/myStudy/index.html>
 then change it to
https://run.pavlovia.org/yoda/myStudy/index.html?participant=%SURVEY_CODE%
 % **(Note: "participant" must be in lower-case)**
23. Having completed the above step, the **Study Information** on your Sona Systems site now displays a Completion URL. Note the client-side URL (the first of the Completion URLs), as you will use it in the next step (Figure 22)

Figure 22



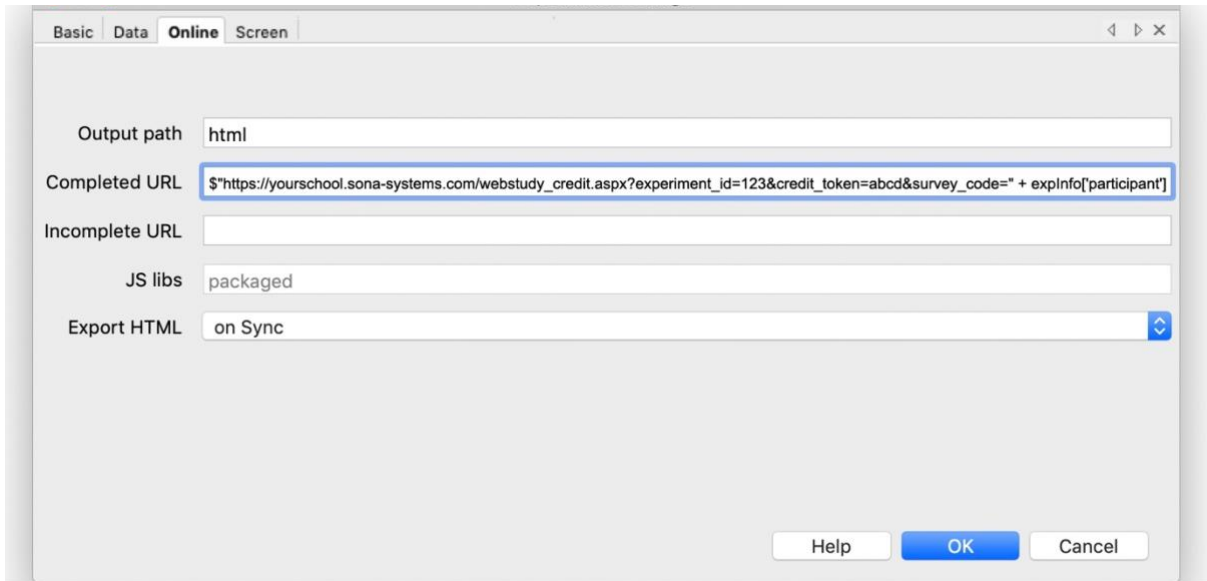
24. In PsychoPy, go to **Experiment Settings** and for the **Completed URL** field, copy the **Completion URL** from Sona (from Step 23) but you will need to modify it slightly, by adding **\$** to the front of that URL, removing the XXXX and adding **" + expInfo['participant']** to the end of it. So, if the **Completion URL** from Sona is:

https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=abcd&survey_code=XXXX

change it to:

`$"https://yourschool.sona-systems.com/webstudy_credit.aspx?experiment_id=123&credit_token=abcd&survey_code=" + expInfo['participant']` (Figure 23)

Figure 23



FURTHER INFORMATION

The Integration Testing Instructions can be found [here](#)

These features are described on PsychoPy's site at the following URL:

("Recruiting with Sona Systems") <https://www.psychopy.org/online/sonaIntegration.html>