Sona Systems, Ltd.

EXPERIMENT MANAGEMENT SYSTEM

Master Documentation Set

Version 2.63

About This Manual

This manual covers usage of the system from a variety of perspectives: Participant (Student), Researcher/Principal Investigator, Instructor, and Administrator. The manual is broken out into sections based on the type of user.

You are encouraged to copy and modify this documentation to suit the needs of your organization. You will find this documentation covers every feature of the software, while you may have chosen to disable certain features in your implementation. Your users may prefer to read documentation that covers the system exactly as they will experience it, as opposed to this documentation, which may cover features that are not enabled for them.

PARTICIPANT (STUDENT) DOCUMENTATION

Introduction

The Experiment Management System provides an easy method for you to sign up for studies, and track your progress through the term. 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.

It should be noted that this documentation covers all the features in the system, but your organization may have chosen to disable certain features. Do not be alarmed if the documentation covers options and features that are not visible on the system you are using.

Getting Started

Your interaction with the system will be minimal and hopefully as painless as possible. After you log in to the system, you can view a list of available studies and any restrictions, sign up for studies that interest you, and track your progress throughout the semester. The system will track when you receive credits for a study, so you can view this online as well.

The system works best if you use a web browser that is less than 2 years old. It works well with Internet Explorer version 4 and above, Netscape version 4 and above, and Firefox version 1 and above. It will work with other web browsers, and with older versions of Internet Explorer and Netscape, however the layout may not be as clean. No functionality will be lost by using an older web browser. 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 toolbar on the top of every screen to navigate anywhere on the site.

Requesting an Account

If you see a link on the front page of the site to request an account, then your organization has enabled the feature to allow you to request an account. Click the link, and you will be required to provide some very basic information. Depending on how your system is configured, you may receive an email notification immediately with your login information, or you may receive the notification only after the administrator has approved the account. The email notification will include login instructions for the system. You will be assigned a default password, which you can change after your first login. In many cases, you may also provide an alternate email address (after your first login) if you prefer to receive future notifications at another email address. The email will come from the administrator's email address (listed on the request account page), so be sure to configure your junk mail filters to allow email from that address.

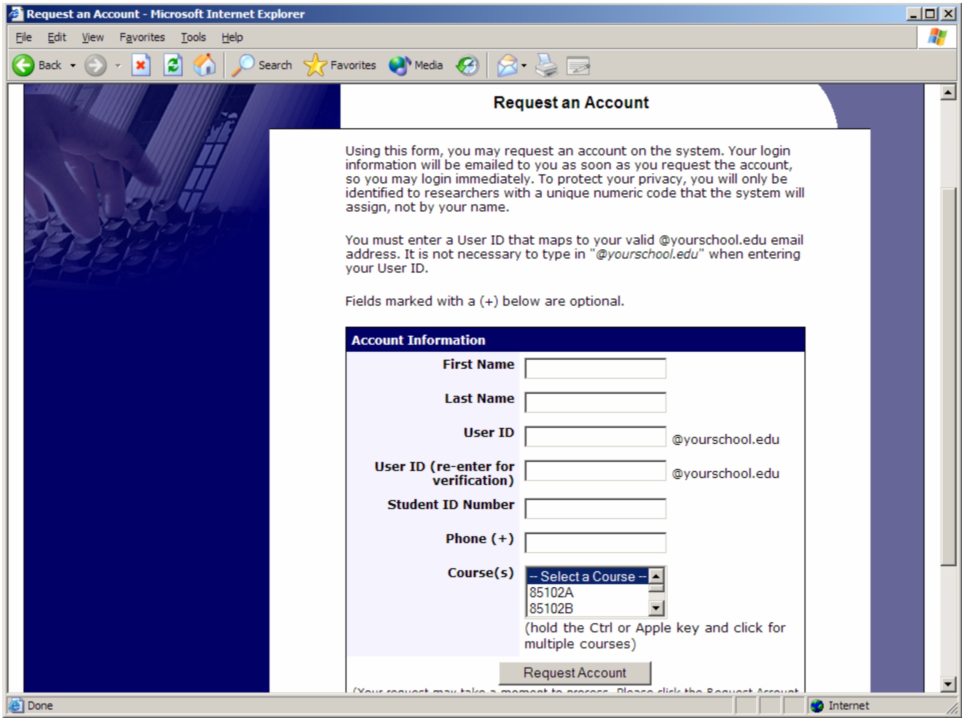


Figure 1 - Requesting an Account

If your organization has not enabled this feature, then your organization will create an account on your behalf. You will receive this account information, most likely by email.

Logging In

Once you have your login information, go to the front page of the site and enter your user ID and password to login.

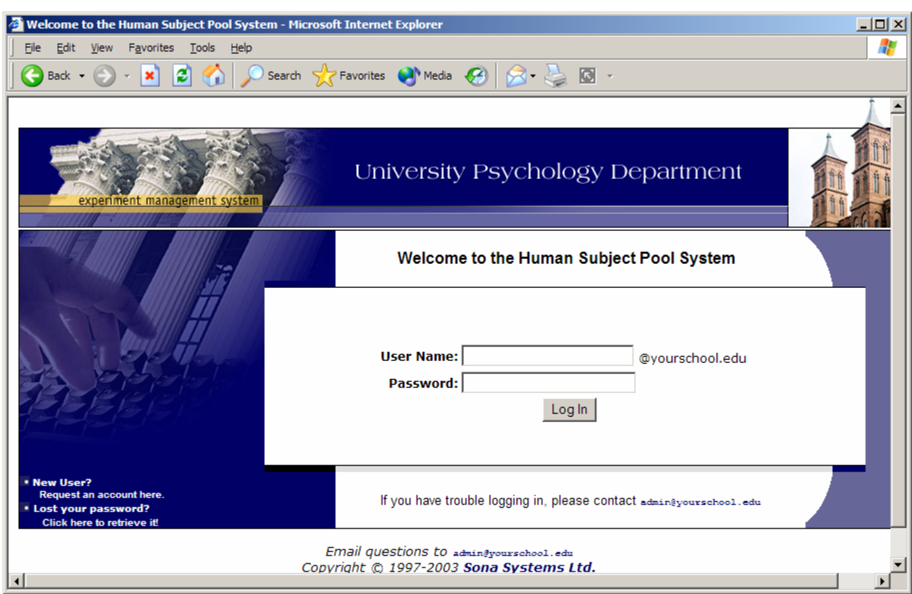


Figure 2 - Login Page

Once you login, you may be asked to review and acknowledge your organization's human subject policy for research. You will need to acknowledge this only once every 6 months. You may also be asked to participate in a pretest. After you complete these tasks, you will see the Main Menu.

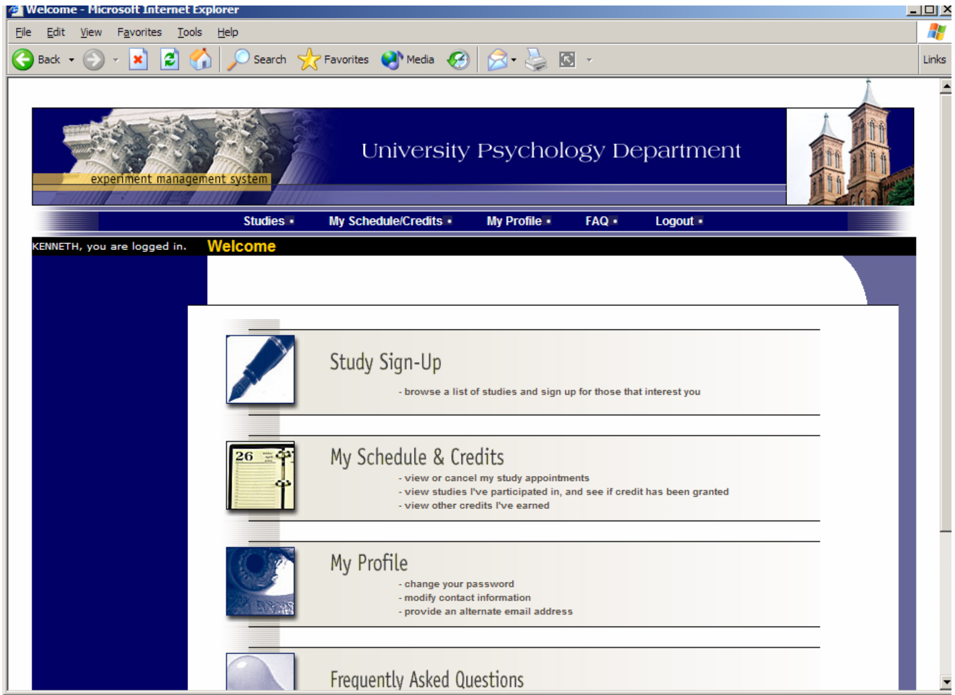


Figure 3 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, usually 20-60 minutes. This is done for security purposes. If this happens, you can always log in again. When you are done using the system, it is better to explicitly log out, to prevent any problems that may arise if someone uses your computer before the session expires. This is especially important if you are using a public computer lab.

Retrieving a Lost Password

If you have forgotten or do not have your password, and the feature is enabled on the system, then you may choose to have your password emailed to you. You will see an option on the front login page if this feature is enabled. Your password will be emailed after you submit the form, and should arrive in your email box momentarily. If you provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address, which is derived from your user ID.

Logging Out

When you are done using the system, choose Log Out from the toolbar on the left side to log out. You are now logged out. It is always a good security measure to close all your browser windows as well, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password, type your new password (twice, for confirmation) in the provided boxes. If you would *not* like to change your password, simply leave these boxes empty.

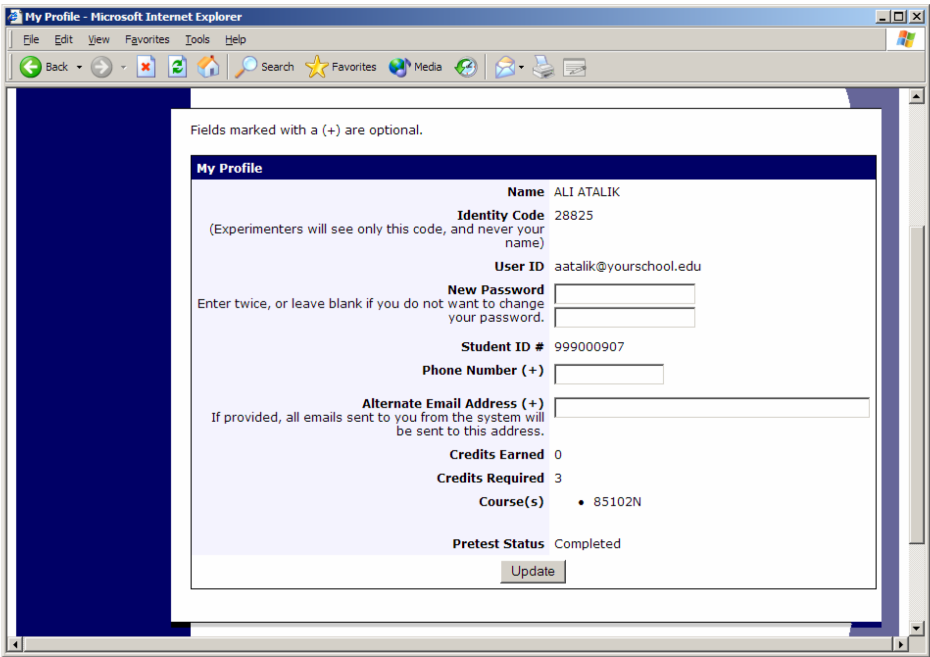


Figure 4 - Updating Your Profile

Email Address Options

There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that you have received credit for a study, or a confirmation that you have signed up for a study. If Unique ID codes are *not* enabled (see Unique ID codes), your email address is also displayed to the researcher when they view who has signed up for their study, in the event they need to contact you.

You have two choices for your email address. When you update your profile, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Hotmail account, for instance), this is the address where any notifications will be sent, and this is also the address that will be displayed to researchers (if enabled).

If you do not supply an alternate email address, the system will derive your email address from your username. Typically, it will add your organization's Internet domain to the end of your user ID to form the address, so if your user ID is "jsmith" and your organization's Internet domain is "yourschool.edu" then it would derive your email address as "jsmith@yourschool.edu".

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as “Email Address” instead of “Alternate Email Address”) and all emails to you will go to that address.

On some systems, the Alternate Email Address option is not available.

Unique ID Codes

If enabled, the system will automatically assign a unique, numeric ID code to you. You should continue to use your normal login ID to log in to the system. The purpose of the ID code is to identify you to researchers in a way that does not reveal your identity or compromise your privacy. If this feature is enabled, you will see this ID code when you view the Human Subjects Policy, when you update your profile, and in email confirmations and reminders about your upcoming study sessions. You should bring this ID code with you when you go to studies or when communicating with researchers, as they know you only by your ID code, and not your name.

Studies

With the system, you may view studies and sign up for those that interest you and where you meet any special requirements. You may cancel your sign-up through the system as well.

You may see some studies that are online studies. You should read the details of these studies closely, but generally you may participate in them online. It is usually assumed you will participate in the study shortly after you sign up for it, though you have until the Participation Deadline Date to participate.

Viewing Studies

To view a list of studies, click on Studies from top toolbar. You will see a list of studies. A brief description of each study will be listed, as well as any special requirements that may restrict your eligibility to participate in the study.

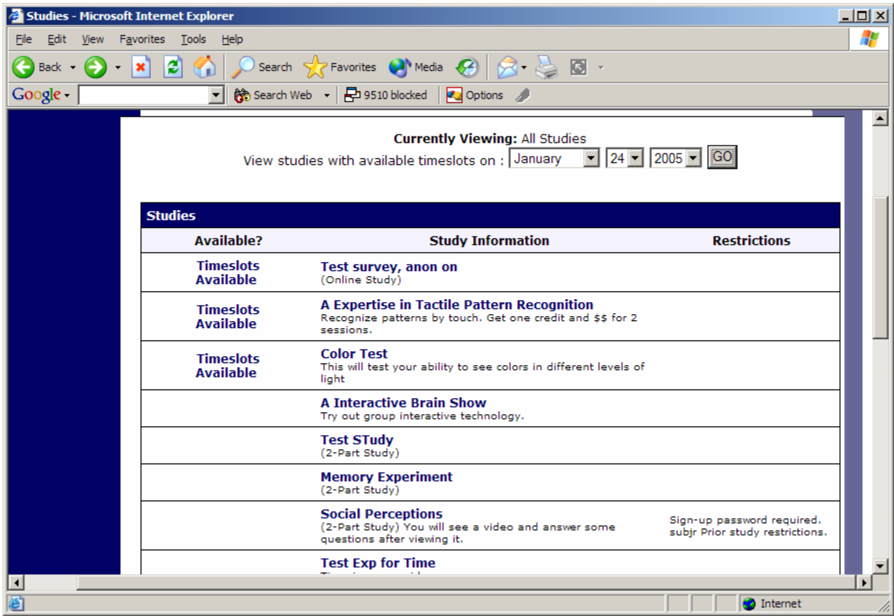


Figure 5 - Viewing Studies

Studies that currently have available participation times (timeslots) will have "TIMESLOTS AVAILABLE" listed next to the name of the study. If no studies have available timeslots, you may want to logon to the system a few days later to see if new timeslots have been added. You may also select a specific date to view studies with available timeslots on that date.

To view more information about a study, click on the name of the study.

Two-Part Studies

Some studies are two-part studies, where you must sign up for both parts of the study at once, and the two parts must be scheduled a certain number of days apart. These studies will be clearly marked.

Online Survey Studies

Some studies may be online survey studies. If you sign up for one of these studies, you will be taken immediately to the survey. As soon as you complete the survey, you will receive credit.

You may withdraw from the survey at any time. If you withdraw, you will not be granted credit immediately, but the researcher will be sent a notification and they may grant you credit later.

Signing Up For Studies

To sign up to participate in a study, find the study you would like to participate in (see Viewing Studies in this documentation). Click on the study name for more information. You will see a list of any special restrictions or eligibility requirements, as well as a contact person if you have questions about the study.

Some restrictions are automatically enforced by the system. If the study has certain pre-requisites or disqualifiers (studies you must *not* have participated in to participate in this study), those will be listed, as well as a note about whether you meet those eligibility requirements.

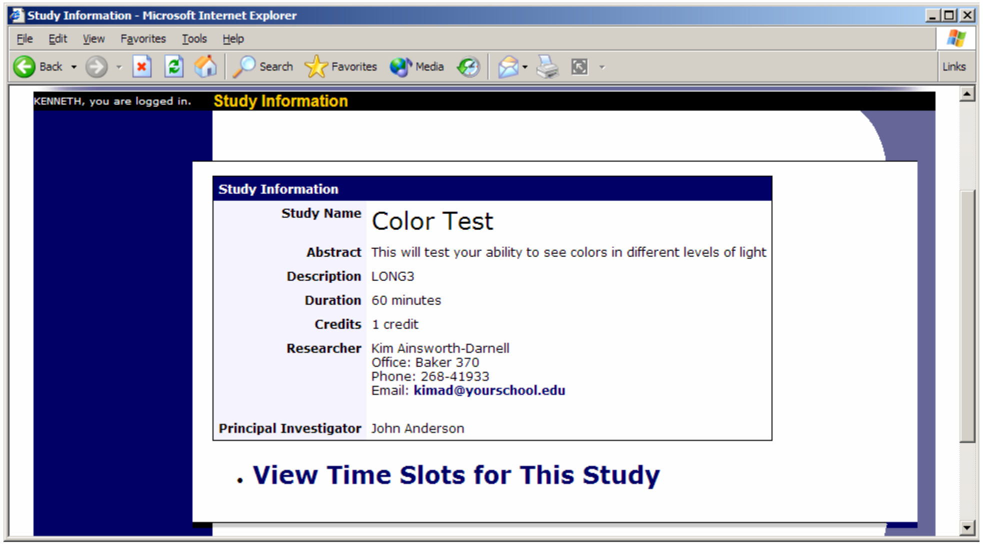


Figure 6 - Study Information

The study may have other restrictions listed as Subject Restrictions. An example of a Subject Restriction is “Left-handed people only.” If listed, then the system does *not* enforce this restriction, but you should only sign up for the study if you meet this restriction. If you sign up for the study and you do not meet the restrictions, you will likely not receive credit for the study, and could face a penalty.

Some studies require a special password to sign up. If this is the case, it will be noted. The researcher should have given you this special password. It is *not* the same as the password you use to login to the system. You will need to enter the special sign-up password just before you click the Sign Up button to sign up for a timeslot.

You may only sign up for a timeslot up until a certain time before that timeslot is scheduled to occur. The system will not show a Sign Up button for timeslots where it is too late to sign up.

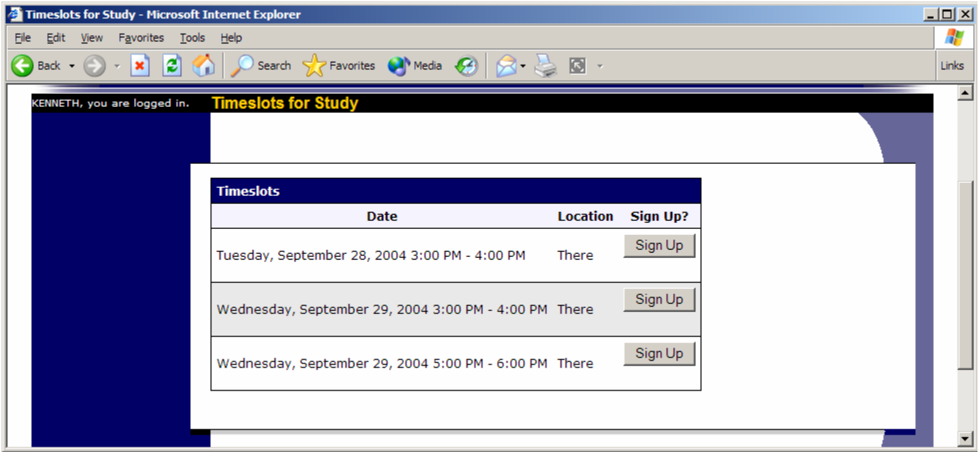


Figure 7 - Study Timeslots

Once you have determined you meet all the requirements, click on View Timeslots for This Study and you will see a list of available timeslots. Choose a timeslot that is convenient for you, and click Sign Up.

After you click Sign Up, you will see information displayed confirming the time and location of the study you plan to participate in. You may receive an email confirmation as well, depending on how your system is configured. You are now signed up for the study. To cancel your sign-up, see Canceling a Sign-Up in this documentation.

Canceling a Sign-Up

If you need to cancel a timeslot you have signed up for, you can do this from the My Schedule and Credits page. Choose the My Schedule/Credits option from top toolbar.

You will see listed all the studies you have signed up for, as well as those you have completed (see the Tracking Your Progress section of this documentation for more information).

Studies you have signed up for that you are allowed to cancel will have a Cancel button next to them. There is a time limit before the study is to occur, when it is too late to cancel. This restriction is listed at the bottom of the page.

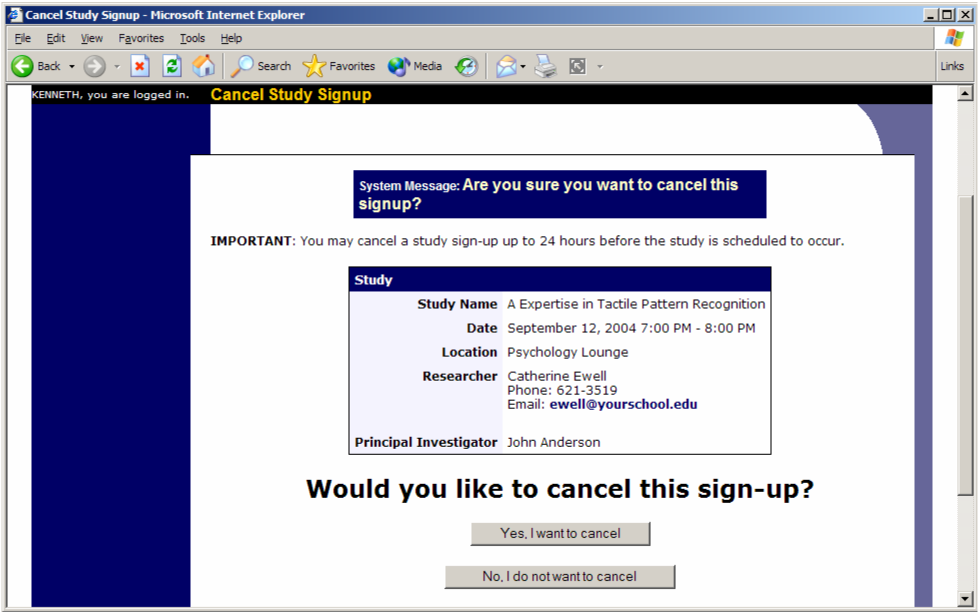


Figure 8 - Sign-Up Cancellation

Once you click Cancel to cancel your sign-up, you will see a confirmation page. You will also be warned if your cancellation might affect your ability to participate in other studies you have signed up for, due to pre-requisite restrictions. If the cancellation will affect your ability to participate in another study you are signed up for, it is *your* responsibility to deal with this issue (usually by canceling the depending study as well). The system will warn you, but will not block the cancellation.

Click Yes to cancel your sign-up, and the sign-up will be cancelled immediately.

If you cancel the first part of a two-part study, the second part will also be cancelled. If you cancel the second part of a two-part study, the first part will *not* be cancelled, but you will need to ask the researcher to sign you up for the second part again, if you would like to participate in it at a later date.

Tracking Your Progress

You may track your progress at any time by choosing the My Schedule/Credits option from the top toolbar.

When you view this page, you will see at the top a list of the number of credits you are required to earn, and how many you have earned so far. You may also have an option to view how many credits you have earned for each course. Below that, if you have signed up for any studies, those are listed as well. In the list of studies, you will see information about your credit status.

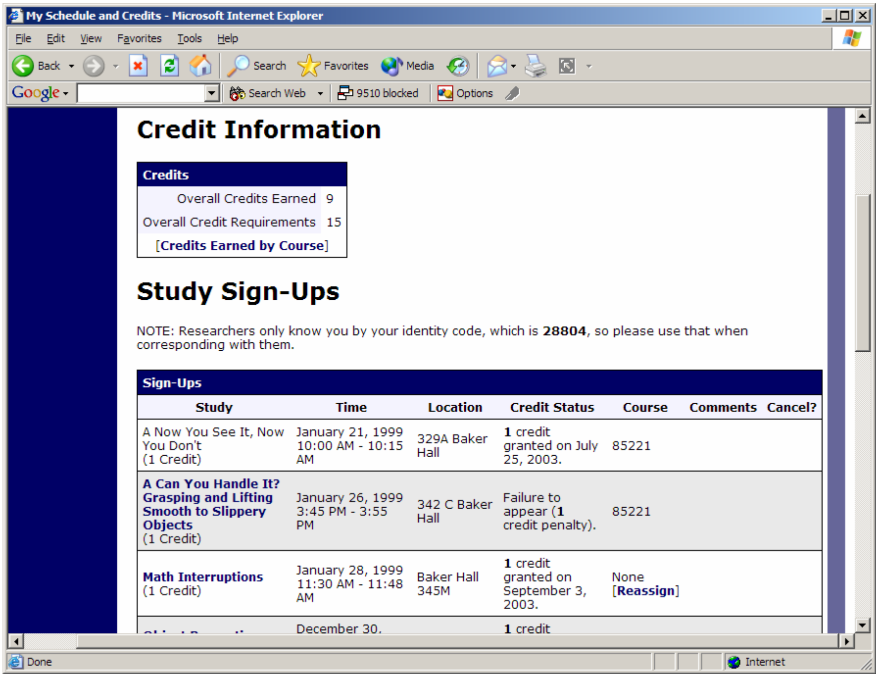


Figure 9 - Viewing Your Progress

If you failed to appear for a study, it is possible you were assessed a penalty. That will be displayed in your progress, and the penalty (if assessed) will either increase the number of credits you must earn, or be deducted from your current credit earnings, depending on how the system is configured. It is possible you might end up with a negative value for the number of credits you have earned. Next to each credit or penalty, you can also see any comments the researcher left regarding the study and your credit for it.

Non-study credit is also listed, when applicable. Non-study credit is usually granted for writing a paper or some other special situation.

It is possible that older records of your participation are in the system, but not displayed. If that is the case, you'll see an option to view the older records as well.

Reassigning Credits

If you belong to multiple courses, and the system is configured to allow it, you may reassign a credit from one course to another. To do this, simple use the Reassign link that appears when you view your progress. The link appears under the course entry for each item in your progress listing.

Online Pretests

If enabled on your system, you may be asked to take an online pretest before you use the system. Depending on how the pretest was configured, you may have the option to opt out of the entire pretest and/or individual questions. You should realize that declining to participate in the pretest or certain questions may affect your eligibility for some studies, so participation is strongly encouraged.

In some cases, you may earn credit for participating in the pretest, and you may even earn credit if you decline to participate in the pretest. If either case holds true, the system will inform you of this before you commence the pretest.

The pretest may consist of multiple sections. All questions are either multiple-choice or fill-in (free-entry) answer, so it should be rather easy to complete. At the end of the pretest, you will have a chance to review and change any of your responses. After you save all your responses, you may not take the pretest again, so answer the pretest carefully.

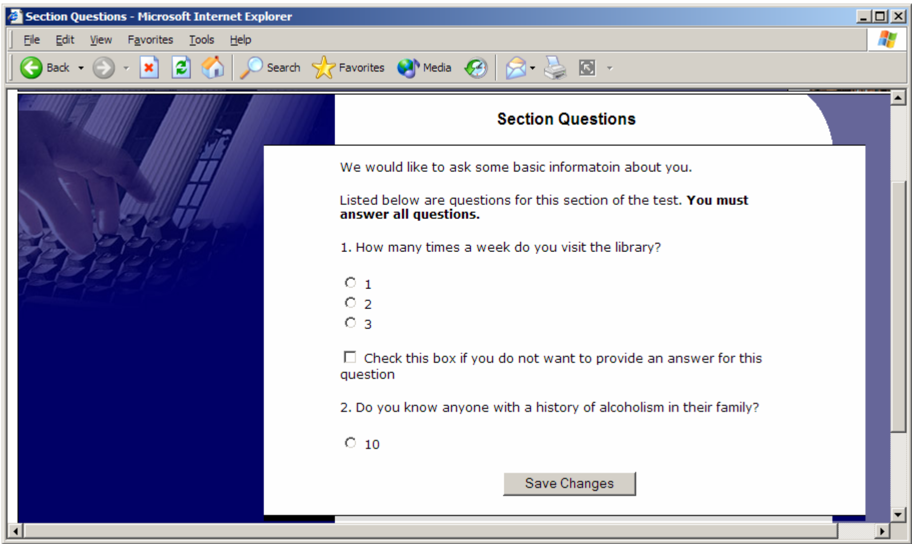


Figure 10 - Pretest Questions

Frequently Asked Questions

Immediately after I login, as soon as I click on any menu option, I am taken back to the login page and I see a message that my authentication has expired. What does this mean?

Your web browser is not properly configured to accept cookies. You should turn on cookies in your web browser, use a different web browser (for example, try Firefox if you are currently using Internet Explorer), or try a different computer. Detailed instructions can be found if you go to the site and enter the url “cookie_help.asp” in place of “default.asp” in the address bar of the browser, when you are on the front page of the site.

I participated in a study, but I have yet to receive credit. How do I receive credit?

The researcher must grant you credit. This is usually done shortly after your participation. If it has been some time and you have still not received credit, contact the researcher.

Who can see the information about my sign-ups? I don’t want everyone to know which studies I signed up for.

Only the researcher and principal investigator of the study may see that you have signed up for it, along with the subject pool administrator. No other users, including other researchers, may see this information.

How do I change the email address where email notifications from the system are sent?

Provide an Alternate Email address and notifications will be sent there. See the Email Address Options section of this documentation for more information. In some cases, this option may not be available.

I wrote a paper instead of participating in studies. How do I know I have completed my requirements?

View the My Schedule and Credits page and any non-study credit will also be listed there. See the Tracking Your Progress section of this documentation for more information.

I noticed that with some studies, I can sign up for them again even if I participated before, while others don't allow for this. Why is this?

Researchers can choose if their studies allow you to participate more than once. Not all studies allow you to participate more than once.

I attempted to sign up for a study, and I was prevented from doing so because the study I was trying to sign up for is a disqualifier for another study I am scheduled to participate in. Why is this?

If you have signed up for a study that has disqualifiers (studies you must *not* have participated in to participate in that study), you may not then sign up for the studies that are listed as the disqualifier studies. You *are* allowed to sign up for the disqualifier studies if the disqualifier study will take place after the study with disqualifiers, or if you have already participated in (and received credit for) the study with disqualifiers. The easiest way to sign up for both studies is to schedule the disqualifier study at a time later than the study with disqualifiers.

RESEARCHER/P.I. DOCUMENTATION

Introduction

The Experiment Management System is used for the scheduling and management of human subject pools and the studies they participate in. Participants, researchers, principal investigators, and instructors all use the system for their respective purposes. As a researcher, you can set up your studies in the system, schedule the sessions (timeslots) when participants may participate, and grant or revoke credit after the session. All of this is handled through a simple web-based interface that you can access at any time, from any web browser.

The system is highly configurable by the administrator, to enforce the rules for the human subject pool exactly as your organization desires. It should be noted that the documentation herein may refer to features that are not enabled on your system. Contact your subject pool administrator, whose contact information appears at the bottom of every page on the system, for more information.

System Basics

In the system, you create studies. Each study may have a number of timeslots, which are the times when you plan to run the study. Participants sign up for the timeslots by viewing a list of studies and available timeslots. You grant or revoke credit to participants after the session occurs.

Principal Investigator Special Note

This documentation applies to both researchers and principal investigators (P.I.s), when P.I. support is enabled by the administrator. A P.I. can perform all the same functions on a study as a researcher. This allows a P.I. to operate in an oversight role and monitor the progress of their studies, and step in on behalf of the researcher when necessary. Because the privileges are the same, throughout this documentation, the term “researcher” can be used interchangeably with “principal investigator” except where otherwise noted.

Participant ID Codes Special Note

If enabled by the administrator, the system will identify participants to you only by a unique, system-assigned ID code, and not by their name or email address, for privacy reasons.

Getting Started

The system works best if you use a web browser that is less than 2 years old. It works well with Internet Explorer version 4 and above, Netscape version 4 and above, and Firefox version 1.0 and above. It will work with other web browsers, and with older versions of Internet Explorer and Netscape, however the layout may not be as clean. No functionality will be lost by using an older web browser. Ask your system administrator if you need help with installing or using a web browser. 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 toolbar on the top to navigate to anywhere on the site.

Logging In

Your administrator will provide you with a username and password to login to the site, as well as the URL (web address). When you go to the front page of the site (the login page), you may see a link to request an account. This form is *only* for participants. Do not use this form to request an account, as participant accounts have an entirely different set of privileges, and the privileges are not appropriate for a researcher.

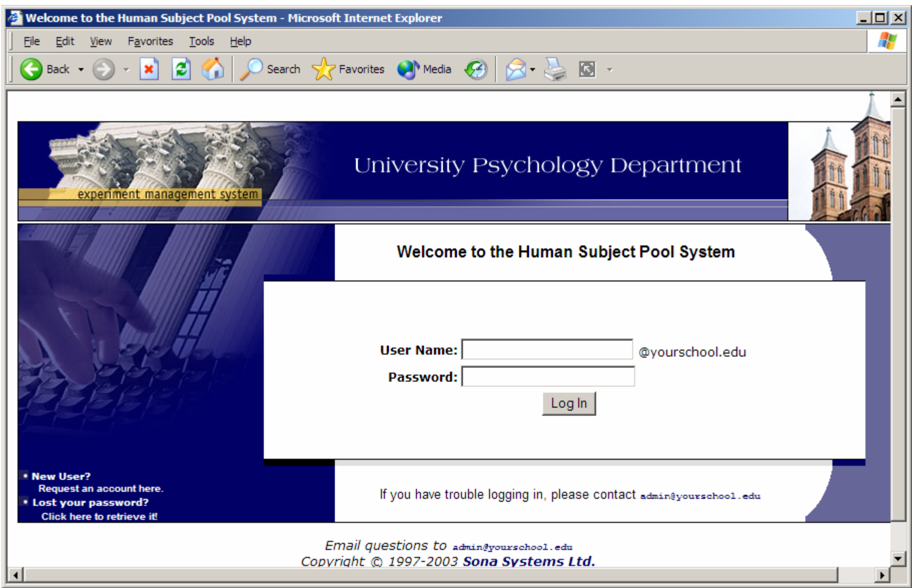


Figure 11 - Login Page

Once you login, you may be asked to review and acknowledge your organization's human subject policy. If required by the administrator, you will need to acknowledge this once every 6 months. You will see the Main Menu after you acknowledge the policy.

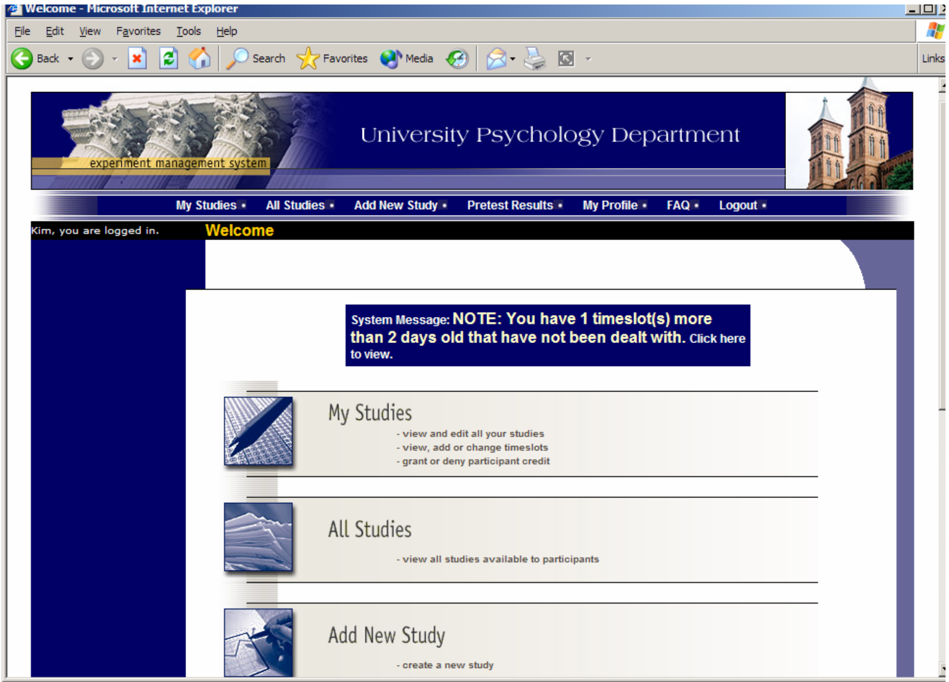


Figure 12 - Main Menu

Your login (also known as a session) will expire after a certain period of inactivity, usually 20-60 minutes. This is done for security purposes. If this happens, you can always log in again. When you are done using the system, it is better to explicitly log out, to prevent any problems that may arise if someone uses your computer before the session expires.

Retrieving a Lost Password

If you have forgotten or do not have your password, and the feature is enabled on the system, then you may choose to have your password emailed to you. You will see an option on the main login page if this feature is enabled. Your password will be emailed after you submit the form, and should arrive in your email box momentarily. If you provided an alternate email address (see the Email Address Options section of this documentation), it will be sent there. Otherwise, it will be sent to your main email address, which is derived from your user ID.

Logging Out

When you are done using the system, choose Logout from the top toolbar to log out. You are now logged out. It is always a good security practice to close all your web browser windows as well, especially if you are using a computer that is shared by others.

Changing Your Password and Other Information

If you would like to change your password or other information about yourself, choose My Profile from the top toolbar. If you would like to change your password, type your new password (twice, for confirmation) in the provided boxes. If you would *not* like to change your password, simply leave these boxes empty.

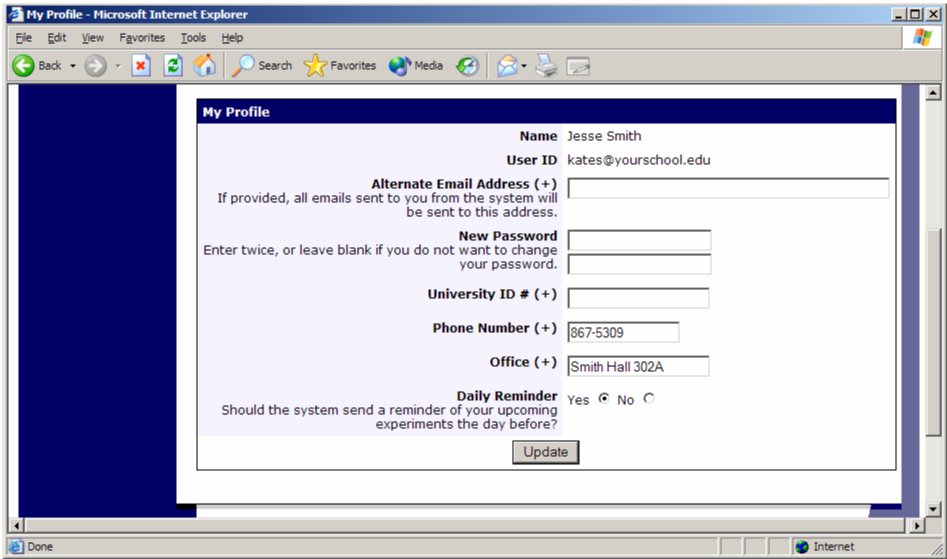


Figure 13 - Updating Your Profile

It is recommended you provide your phone number and office location, as most human subject committees require that this information be made available to research participants. If you are a researcher, this contact information will be displayed to participants when they view information about the study. If you are a principal investigator, only your name will show (since the researcher is the primary point of contact for a study).

You may also choose to receive a daily reminder (by email) with information about all of your study sessions scheduled for the following day.

Email Address Options

There are certain events in the system which will cause an email notification to be sent to you. Most often, these are notifications that a participant has signed up or cancelled their sign-up for your studies, but there are a few other cases where it may be used as well. The email address is also displayed to the participant when they view information about the study, in case they need to contact you with questions.

You have two choices for your email address. When you update your personal information, you will see a box where you may provide an alternate email address. If you provide such an address (this could be a Hotmail account, for instance), this is the address where any notifications will be sent, and this is also the address that will be displayed to other users (including participants in your studies).

If you do not supply an alternate email address, the system will derive your email address from your username. Typically, it will add your organization’s Internet domain to the end of your user ID to form the address, so if your user ID is “jsmith” and your organization’s Internet domain is “yourschool.edu” then it would derive your email address as “jsmith@yourschool.edu”.

In some cases, depending on how the system is configured, you will be required to provide an email address (which will be listed as “Email Address” instead of “Alternate Email Address”) and all emails to you will go to that address.

Working with Studies

Most of your time on the system will be spent, not surprisingly, using the study-related features of the system. Be sure to read this section closely, in its entirety, as there are special features and situations you should be aware of.

Web-Based (Online) Studies

If enabled, you may set up studies that are web-based (online), and these studies may be set up internally in the system (as a survey) or outside the system. The options will vary depending on how your system is configured.

There are a few things to note about web-based studies:

- Once you indicate to the system that the study is web-based, you may not be able to change it so it is no longer web-based (but you can disable or delete the study). So, make this choice carefully
- Web-based studies are typically setup so there is one timeslot, and that timeslot contains the maximum number of participants you would like to participate, and the *last* date and time when they can participate (often, this is the end of the term). It is not recommended that you set up multiple timeslots for a web-based studies (it confuses participants), though the system will support it.
- It is generally assumed that participants will participate in an online study shortly after they sign up. Because of this, the system will expect you to grant credit to them soon after they sign up. If you are creating an online survey within the system, credit will be granted automatically, immediately after the participant completes the survey.

Throughout the sign-up process, participants are notified that the study is web-based. If the study is not administered by the system, then participants are not given the URL for the website until they have signed up, to ensure they do complete a sign-up in the system for the study. This restriction applies only to participants, and only to web-based studies administered outside the system.

For web-based studies administered outside the system, you will want to develop some method of linking the participant’s sign-up in the system to your online study, so you know who to grant credit to. To make this easier, the system has a built-in facility for this. If you enter the text `%SURVEY_CODE%` anywhere in the Study URL field for the study, the system will automatically replace this with a unique, numeric ID code when the URL is displayed to participants. If a participant is not viewing the URL (for example, the researcher is viewing the URL), this text will simply be removed. You can then program your online study to process and record this numeric ID, which will also be displayed on the pages in the system where you grant credit for participation. Note this special text must be in all capital letters, and surrounded by percent signs. You may confirm it was entered correctly because a sample URL will be displayed when you go to view (not edit) the study, below the normal study website link.

Online survey studies (surveys administered by the system) are discussed in great detail in the section Online Survey Studies, later in this document. Please read it carefully before setting up an online survey study.

Studies for Pay

You may have a situation where participants are compensated for their participation in the study. They may or may not also receive credit for the study. If the study is not for credit, you may set it up as a pay-only study and specify the compensation amount. If participants are compensated *and* they receive credit, you should set it up as a credit study and indicate additional compensation in the study's information section.

Regardless of the type of study, after a participant participates in a study (including studies that are for pay only), you should still go into the system and indicate their participation by granting the "credit" (or revoking if they did not show). This allows the system to properly enforce certain restrictions on the participant and their studies.

Two-Part Studies

You may create a two-part study in the system. Often, these are studies involving memory research, where the participant must return a specified number of days after the first session. When creating a study, you may specify the day range for the second part of the study (e.g. 7 to 10 days after the first part). Participants are required to sign up for both sessions at the same time, to reduce the chance they will forget to sign up for the second part. Each part of a two-part study may have a different credit value and duration, but each part must be the same type – either both parts are for credit or both parts are for compensation.

You may specify that the second part of the study must be scheduled to take place at the exact same time as the first part (on a different date), or at any time on the dates that are the specified number of days after the first part.

You should ensure there are enough available timeslots for both parts of the study, or participants will be prevented from signing up for either part. Participants may cancel either part of their sign-up if necessary. If they cancel the first part, the second part is automatically cancelled as well. If they cancel only the second part and the first part has already occurred, and they would like to participate in the second part later, you will need to manually sign them up for the second part (if you are allowed to do so), or ask the administrator to handle this.

If you grant a no-show for the first part of a two-part study, the second part of that participant's sign-up will *not* be cancelled automatically, but you will be reminded of the situation in case you would like to cancel the second part. The cancellation is not automatic as there are some situations where automatic cancellation is not desirable.

Adding a Study

Some researchers choose to set up their studies in the system before they have received the proper approvals (usually from their IRB) to run the study. This is supported in the system. You can setup a study but specify that is it not visible to participants. That way, as soon as your approval is received, you can simply make the study visible and everything else is already prepared. You can also post a study and make it visible immediately, if that is appropriate. Some systems will be configured in such a manner that only the administrator can make the study visible to participants, in which case you will need to contact the administrator to do so.

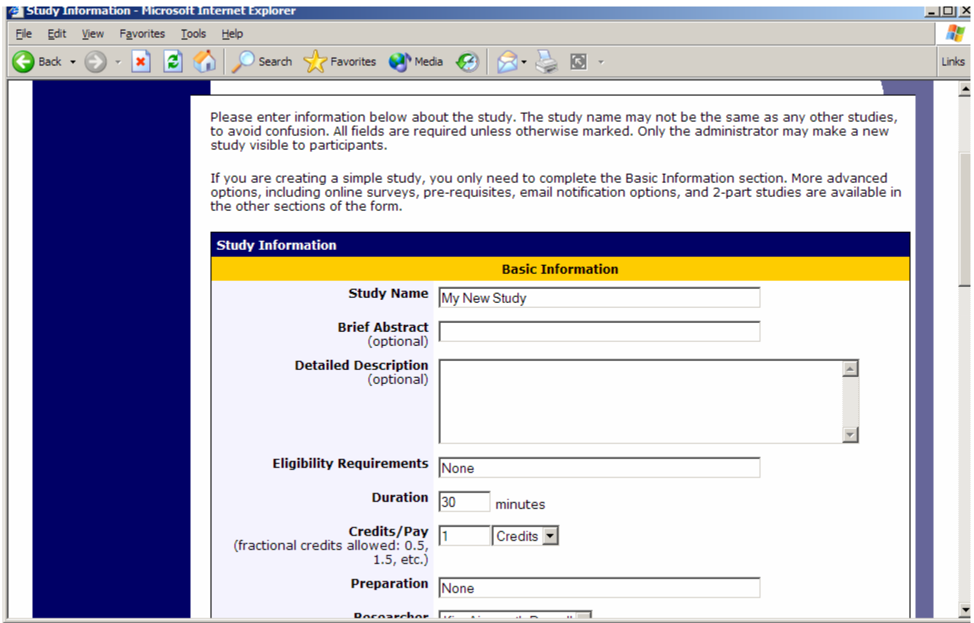


Figure 14 - Adding a New Study

To add a study, choose the Add New Study option from the top toolbar. You will need to fill out a number of fields, which are explained in the following table. All fields must be filled out unless otherwise noted.

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.
Short Description (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 you may want to list the most pertinent details here. For-pay studies usually include the compensation information here. This field is optional.
Long Description (this feature might be disabled on your system)	This can be a rather lengthy 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, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).This field is optional.
Eligibility Requirements	If there are any restrictions on who may 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 a participant will only sign up for a study in which they are qualified, since they would otherwise fail to receive credit. In most cases, you will leave this field as-is and set pretest participation restrictions, which you can do after you add the study.
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, and on most systems, you hold down the Ctrl key and click the desired studies. You may specify that participants must have participated in *all* of the studies you specify, or *at least one* of the studies specified.

	The system will handle enforcement of the pre-requisites in a strict or lenient fashion depending on how your system is configured. In strict enforcement mode, the participant must have *received credit* for the pre-requisite studies. In lenient enforcement mode, the participant must only be *scheduled* to participate in the pre-requisite studies (it is assumed they will go on to complete the pre-requisite studies). You can ask your subject pool 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 you study (they are warned of this situation), and you have configured your study so that the researcher will receive notifications of cancellations or sign-ups, then the researcher will receive notification of the pre-requisite problem and can contact the participant if necessary.
Disqualifiers (this feature might be disabled on your system)	If there are any studies 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.
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 set the study when they go to view the list of available studies. You may choose No Restrictions if you would like to make the study available to participants in all courses.
Duration	The amount of time, in minutes, that each study session will take. If you are setting up a 2-part study, then this setting applies to the first part of the study.
Timeslot Usage Limit	Depending on how your system is configured, you may see an item that specifies the maximum number of

	experimental session hours available to this study. This value is set by the administrator, and only the administrator can adjust it. To determine the current session usage for a study, go to the Add A Timeslot page for the study, and the usage will be listed there.
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 as-is.
Sign-Up Password (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 a password just for this study. Participants must know the password to sign up. This is often used in cases where the researcher wants to personally select participants, so the researcher only provides the password to the desired participants. If you do not need a sign-up password, leave this field blank.
Is this a web-based study? (this feature might be disabled on your system)	If this is a web-based (online) study, choose the type of online study it is. If you have set up the study on another website, you should note the study is administered outside the system. If you want to set up an online survey study to be administered by the system, select the appropriate option.
Should survey participants be identified only by a random, unique ID code?	This only applies to web-based studies administered by the system, and only if participant anonymous ID codes are not already turned on system-wide. If set to Yes, participants are only identified by a unique system-assigned ID code, to protect their privacy. Participants are also notified of this when they start the survey. Once enabled, this setting cannot be changed after participants have taken the survey, as a matter of privacy protection.
Study URL	The URL (web address, usually starting with http://) 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 you may easily identify participants, add the text `%SURVEY_CODE%` in the URL where you would like the identifier to be placed. This is discussed in further detail in the Web-Based (Online) Studies section of this documentation.
Credits/Pay	Enter the number of credits or compensation for the study. A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning. Please see the Studies for Pay section of this documentation for more information on how to fill out this field in the case of for-pay studies. If the study has a credit value, you may specify a fractional credit value up to one decimal point of accuracy (e.g. 0.5, 1.5, etc.). If you are setting up a 2-part study, this is the value for the first part of the study. After a study has sign-ups, you may not change the credit value of the study. However, the administrator can change the credit value, in certain situations.
Is this a 2-part study?	Select Yes or No if this is a 2-part study. You can only decide this when creating a study (not when editing it), and this setting may not be changed after the study is created. See "Two-Part Studies" for more information.
Credits/Pay, Part 2	Enter the number of credits or compensation for part 2 of the study, if this is a two-part study (the value is ignored otherwise). A value of 0 is acceptable, and may be desired in cases where the study is part of a set of studies, where only the final study is credit-earning. Please see the Studies for Pay section of this documentation for more information on how to fill out this field in the case of for-

	pay studies. If the study has a credit value, you may specify a fractional credit value up to one decimal point of accuracy (e.g. 0.5, 1.5, etc.).
Part 2 Duration	The amount of time, in minutes, that part 2 of the study will take.
Part 2 Scheduling Range	Specify the number of days (as a range) after part 1 is scheduled, that part 2 should be scheduled. This setting only applies to two-part studies. The range may be the same value (e.g. "between 7 and 7 days") if desired, but must be a whole number. See "Two-Part Studies" for more information.
Part 2 Scheduling Leniency	In some cases, you may want to ensure that the participant schedules the second part of the study to take place at exactly the same time (on a different date) as the first part. If so, choose Yes for this option. If there is some flexibility so they can sign up for any time within the Part 2 Scheduling range, choose No for this option.
Researcher(s)	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 the researcher). Depending on how your system is configured, you may be able to specify multiple researchers for a study. If you specify multiple researchers, each researcher has full control over the study. The pulldown box lists only users who are researchers.
Principal Investigator (this feature might be disabled on your system)	Select the Principal Investigator for this study. The person you select will have full access to the study. If you see this option, then you must select a P.I. The pulldown 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. This field may be required depending on how your

	system is configured.
IRB Approval Expiration Date	The date when IRB approval expires. This field may not appear if your system is not configured for it. 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 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.
Visible to Participants?	Select Yes if this study should show up on the list of studies which participants may sign up for. Ensure you have received the necessary approvals to run the study before choosing Yes. A study must be Visible and Active to show up on the list of studies which participants may sign up for. If you select No, the study will not be visible to participants. Some systems are configured such that only the administrator can make a study visible to participants. If that is the case, you should contact the administrator when you are ready to make the study visible to participants. As a researcher, you can always make a visible study invisible to participants, but you may need the administrator to make it visible again, if so desired. 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 (if the system is configured this way). 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.
Active Study?	Select Yes if this study is in progress. You must select Yes and the study must be

	Visible if you want the study to show up to participants so they can sign up for it. If a study is Not Visible 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 they are viewing their participation history. It will also show up on the study information page (for an individual study) when 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 to participants on the list of studies they may sign up for. Often, this is done so the system can enforce pre-requisites, where the inactive study is a pre-requisite for an active study.
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. 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 timeslot. If set to No, then it is assumed 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.
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 participant 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 previously failed to show up for the study.
Private Comments	This is an optional area where you may enter any comments or notes about the study, which are only visible to the researchers for this study.
Participant Sign-Up Deadline (this feature might be disabled on your system)	Enter the deadline before the study is to occur that the participant may sign up, in whole hours.
Participant Cancellation Deadline (this feature might be disabled on your system)	Enter the deadline before the study is to occur that the participant may cancel their existing sign up, in whole hours. Generally the cancellation deadline should be shorter than the sign-up deadline, so participants can easily cancel an accidental sign-up.

Once you have filled out the appropriate information, save it and the system will be updated immediately with the information. Your next step is likely to add timeslots (sessions). See the Working with Timeslots section of this documentation for more information.

If you need to update this study, see the following Updating a Study section of this documentation. If you would like to add participation restrictions based on pretest responses, you can do so when you update the study (see Pretest Participation Restrictions).

Updating a Study

You may update any of your studies at any time. To do so, choose My Studies from the top toolbar, and you will see a list of your studies. Click on the desired study, and choose the Change Study Information link.

You will see a form remarkably similar to the one you used to add the study. A few options may no longer be changeable depending on the status of the study (e.g., if participants have already signed up for it). The fields shown are all the same as when you added the study. See the Adding a Study section of this documentation for an explanation of those fields.

The changes you make will be will be take effect immediately after they are saved. If administrator approval is required before a study is made visible to participants, and the name, description, or eligibility requirements of the study are changed, then the study will require re-approval by the administrator before it is again visible to participants. The reason is that many IRBs are quite strict about a study's wording, so the administrator must look over any changes.

If you need to change the credit value for a study, and there is no option to do so, this means the study already has at least one participant signed up for it. You cannot change the credit value when a study is in this situation because there is no easy way to handle past credits for the same study (e.g. should old credit grants for the same study be adjusted to reflect the new credit value, or kept the same?). If the study is nearing the end of its run, and variable credit granting is enabled, then the easiest solution is to grant the new credit value to participants who sign up in the future. If you prefer that the credit value is changed for the entire study, contact the administrator, who can make the change for you under certain conditions.

Deleting a Study

You may delete a study only if participants have not signed up for it. If you need to delete a study which already has sign-ups, you should make it Inactive instead, if you do not want it to be visible to participants. You may not delete a study with has sign-ups, so the option will not be presented. If you want to delete a study that has sign-ups, please contact the administrator. The administrator can delete a study with sign-ups, but only if the sign-ups are all without credit values (this usually occurs when study participation history from a previous semester was retained).

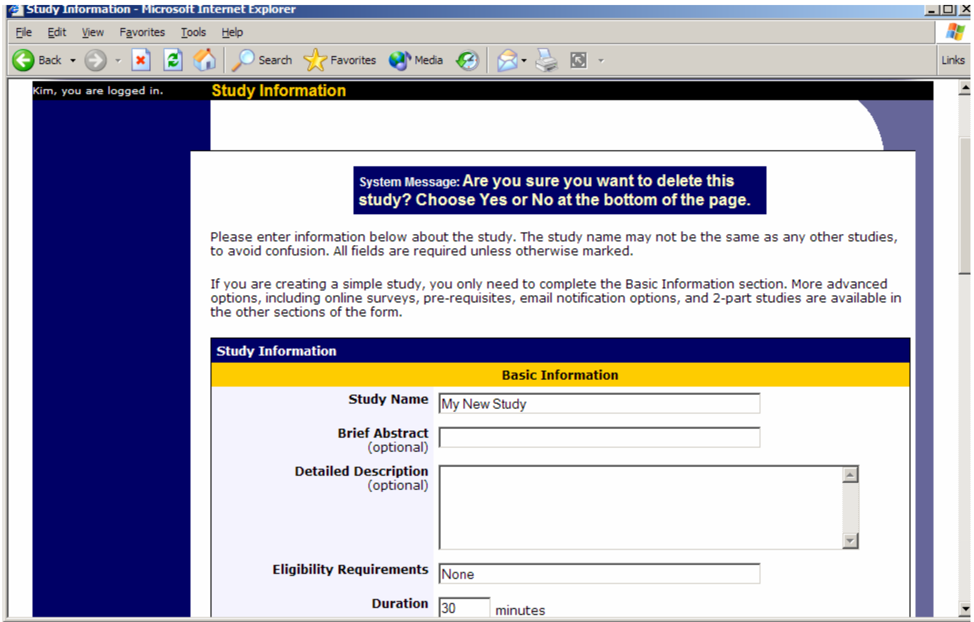


Figure 15- Deleting a Study

To delete a study, choose My Studies from top toolbar, click on the desired study, then choose the Delete Study option. You will see a confirmation page. Choose Yes (at the bottom of the page) to delete the study.

Once a study is deleted, it cannot be restored, so use this feature very carefully. If you delete an online survey study, the survey will also be deleted.

Pretest Participation Restrictions

If enabled on your system, the system might contain an online pretest that participants may (or must, depending on your system configuration) complete. You may place participation restrictions on your study based on pretest responses. Participants are unaware that such restrictions are placed on the study. These restrictions are never listed to them. If they do not qualify to participate in a study because they do not meet the pretest participation restrictions, then the study will simply not be listed to them. This is important to note – participants never know why a study was or was not listed to them, because they are unaware of the pretest restrictions.

You may restrict a study on any question or questions on the pretest that allowed for a multiple-choice answer where only one choice could be selected. You may also restrict a study based on a computed section sum or average score for a participant, if the pretest was set up in such a manner. You may restrict to one choice or many choices for any question. If you restrict on multiple questions, it is the same as a logical "AND." For example, if you setup the pretest restrictions so that participants must have answered "Yes" to a "Do you wear glasses?" question and "Blue" or "Grey" to "What color are your eyes?", then they must meet *both* requirements to participate. In other words, only participants who wear glasses and have either blue or grey eyes are eligible. There is no support for a logical "OR" restriction across multiple questions.

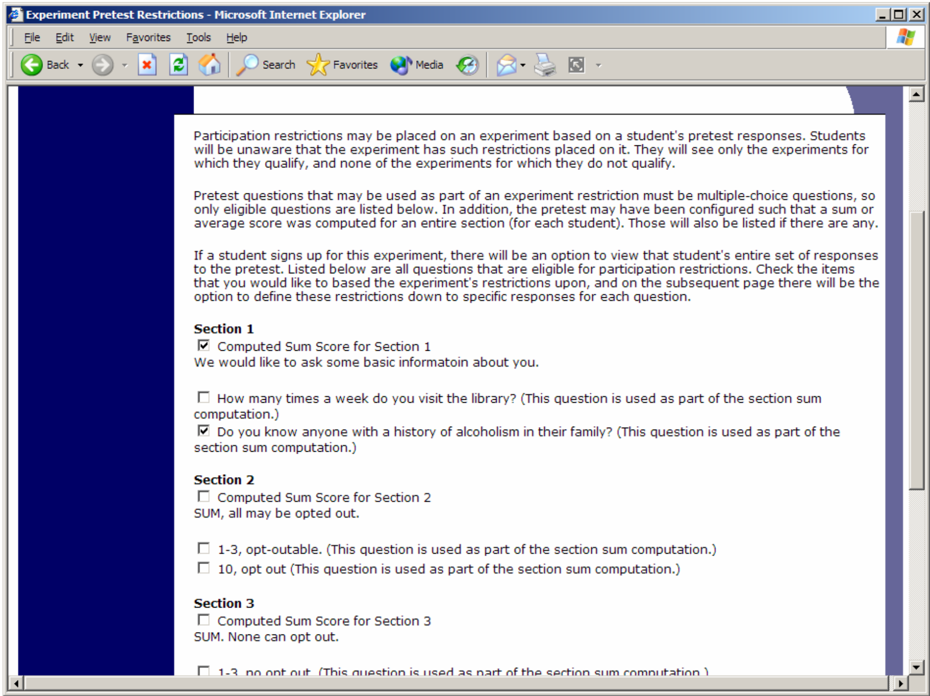


Figure 16 - Pretest Restrictions Question Selection

To set participation 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. If the study already has some restrictions, those will be checked, and you will see how many participants currently meet the restrictions. Choose the questions you would like to restrict upon (and keep the existing checked restrictions checked, unless you want to remove that restriction), and click on the Set Restrictions button. On the subsequent page, you can select each value that is acceptable for each question you have chosen. Once you have selected all the acceptable values, save your changes and they will take effect immediately. It is important to note that if you change the restrictions, it will *not* remove the study sign-ups for participants who qualified under the previous set of restrictions. For this reason, you should probably decide on your restrictions before making the study available to participants.

If you have restriction requirements where you would like to restrict participation to a percentage of the population (for instance, the responses that were chosen by the top 25% of people), but you are not sure which responses meet this requirement, you can use the pretest response analysis feature to determine the valid responses. See Pretest Response Analysis for more information. You may also use Analyzing Pretest Responses to get an idea of how many participants are potential candidates for participation in your study, based on a specified set of restrictions.

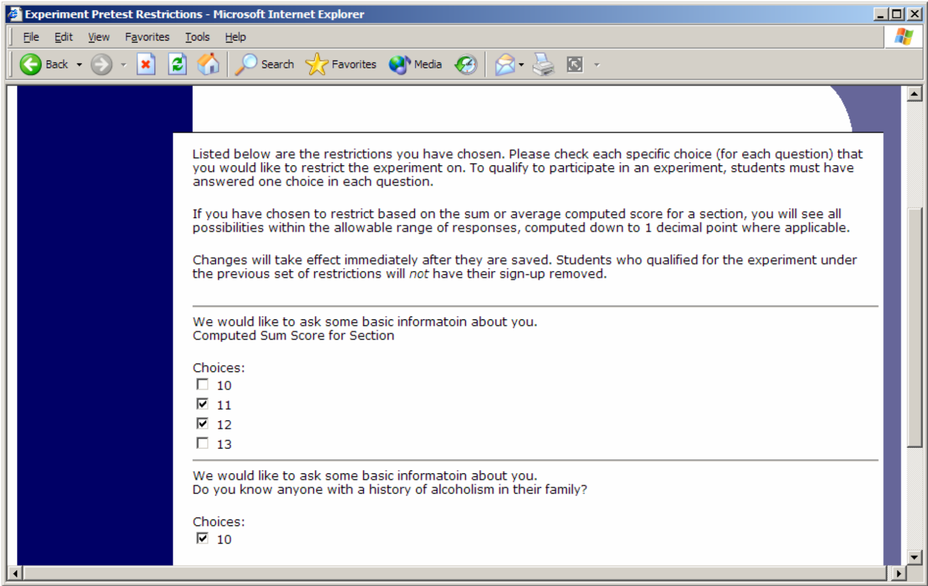


Figure 17 - Pretest Response Restrictions

While viewing the list of pretest restrictions currently set for a study, and the number of participants who meet those restrictions, you may see the option to Invite Qualified Participants. Using this option, you may craft an email to be sent to all qualified participants. You may choose to exclude those who have already signed up for or participated in any studies you specify. The system will pre-fill the email with useful information like the name of the study and how many timeslots are currently open.

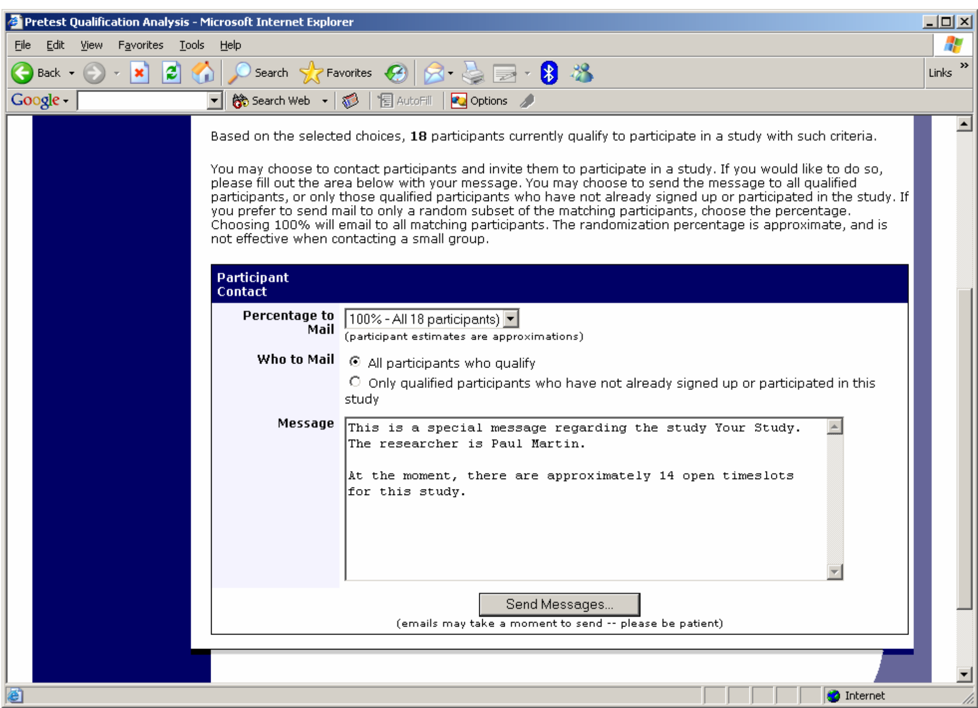


Figure 18 - Contacting Qualified Participants

Viewing Your Studies

To view your studies (and not the studies of others), choose the My Studies option on the top toolbar. The system will list all your studies in alphabetical order by study name, grouped by studies that are active, then inactive studies.

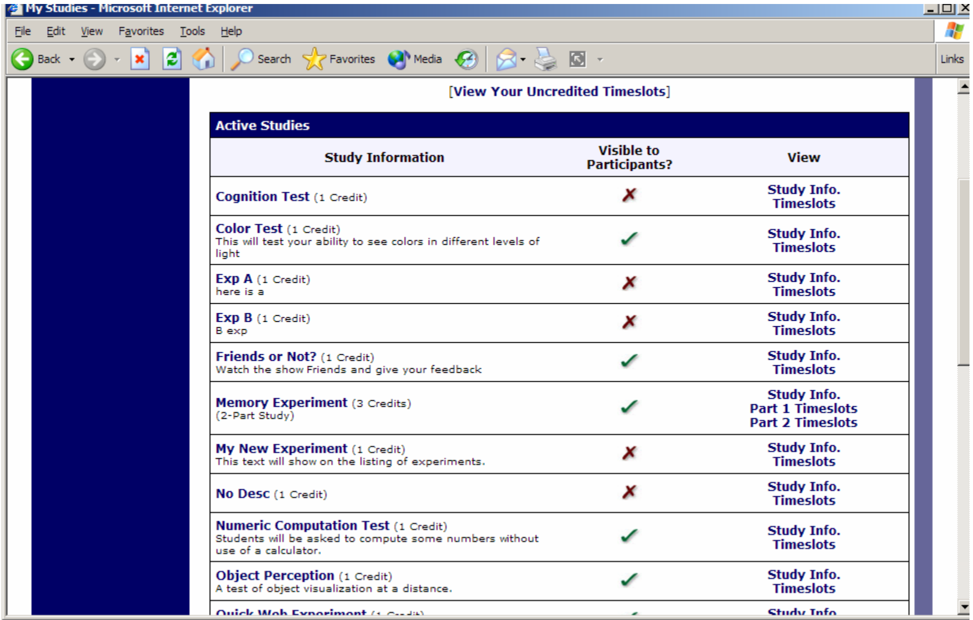


Figure 19 - Your Studies

Viewing Other Studies

To view all studies that are visible to participants, choose the All Studies option from top toolbar.

You will see a list first of all Active studies. These studies will show up to participants on the list of available studies. The next group of studies (if there are any) is Inactive studies. These will *not* show up on the list of available studies (to participants), but participants can access information about these individual studies on links from the page with their progress (if they participated in the study) or if another study has the Inactive study listed as a pre-requisite or disqualifier.

Online Survey Studies

Introduction

The system includes a rather extensive online survey feature (if enabled on your system). It allows you to set up an online survey as a study, and participants who sign up for the study will be asked to immediately complete the survey. Upon their completion of the survey, they will be granted credit automatically by the system. You may then analyze their survey responses on an individual basis, or download the raw data across all participants who completed the survey, for further analysis. There is a slight chance that you may notice a discrepancy in the number of responses when analyzing a single question compared to downloading the entire set of responses. This can occur if a participant is currently taking the survey, but has not completed it. Their data is included in the single-question analysis (when available) but not in the full download of responses, as there is not a full set of data for an in-progress participant.

To comply with regulations, the participant is given the opportunity to withdraw from the survey at any time. If they withdraw, they are taken to a form where they can submit any comments (this is optional), and their withdrawal is then noted and all their responses are deleted. The researcher receives an email when this occurs, with some other information, including how much time was spent on the survey, and how many questions were answered. You should then grant credit to the participant as appropriate.

There is a space to provide closing text, which is displayed to participants after they successfully complete the survey (after they have saved all their responses and cannot go back). This is an ideal place to include any relevant debriefing information.

The online survey feature is rather complex due to the many features it contains. In addition, your ability to modify the survey after participants have started to take the survey is quite limited. Because of this, you should plan out your survey well in advance, to make sure it is finalized before you make it available to participants. Do not hesitate to contact the administrator if you have any questions. You may find it helpful to plan out the survey on paper before entering it into the system.

A survey may have an unlimited number of sections and an unlimited number of questions per section. Questions may be free-entry (requiring the participant to type in an answer) or multiple-choice (pick only one or pick many from the list of choices). You may also specify that the system computes a participant's results for an entire section, as either a section sum or average score. This computed sum or average can be computed only for numeric, multiple-choice (pick only one) questions in the section. Such a computation is often useful when a participant's aggregate score is more important, such as with a depression battery.

Sections can be displayed in a specified order or random order, or a combination of both. Every section may contain introductory text introducing the section, and the survey itself may also have introductory text introducing the survey, as well as closing text that is displayed upon completion of the survey. You may specify that questions within a section are displayed in random order. Multiple choice questions can have their choices displayed in the entered order or random order (this is specified on a per-question basis). Multiple choice question choices can be displayed horizontally (across the page) or vertically (down the page).

Note that there is a bug in Internet Explorer 5 on the Macintosh platform that may result in a slow response for participants when they are using this specific web browser/computer combination and completing survey sections with many choices. Microsoft has discontinued support for Internet Explorer on the Mac, and most likely will not fix this bug. The other browsers on the Mac (Firefox and Mozilla) all work perfectly, and there are no problems for Windows users with any browser. The specific problem occurs only rarely, but can occur.

Creating or Modifying a Survey

To create a survey, first create an online survey study. After you create it, you will see the option Update Online Survey when you view the study information. You may not create 2-part online survey studies.

It is important to note that while you are making changes to a survey, it is deactivated so participants may not participate in it. When you go to the Finalize Survey option after you have finished your work with the survey, you will have the opportunity to save your changes and make the survey active (available to participants) or inactive (not available to participants). You should always choose the Finalize Survey option when you finish your work with the survey, as the system saves all changes and computes some other important data when you finalize the survey. If you would like to continue work on the survey at a later date, you should still choose the Finalize Survey option to ensure your changes during the current session are properly saved (most likely you would choose to keep the survey inactive in this situation).

General Survey Information

Choose the General Information option (if creating a new survey, this is the first page you will see) to provide some basic information about the survey. The fields are explained below:

Field	**Description**
Introductory Text	Optional. Provide a set of text that will be displayed when a participant starts the survey. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).
Closing Text	Optional. Provide a set of text that will be displayed after a participant completes the survey and saves their responses. This is an ideal place for debriefing information. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).
Display sections in random order?	You may specify a specific ordering for sections, have the system randomize the order for all sections, or specify the order of some sections, and a random order for other sections. If you specify the order for

	only some sections, you may also specify, for each section, whether it should be displayed before or after the random-ordered sections.

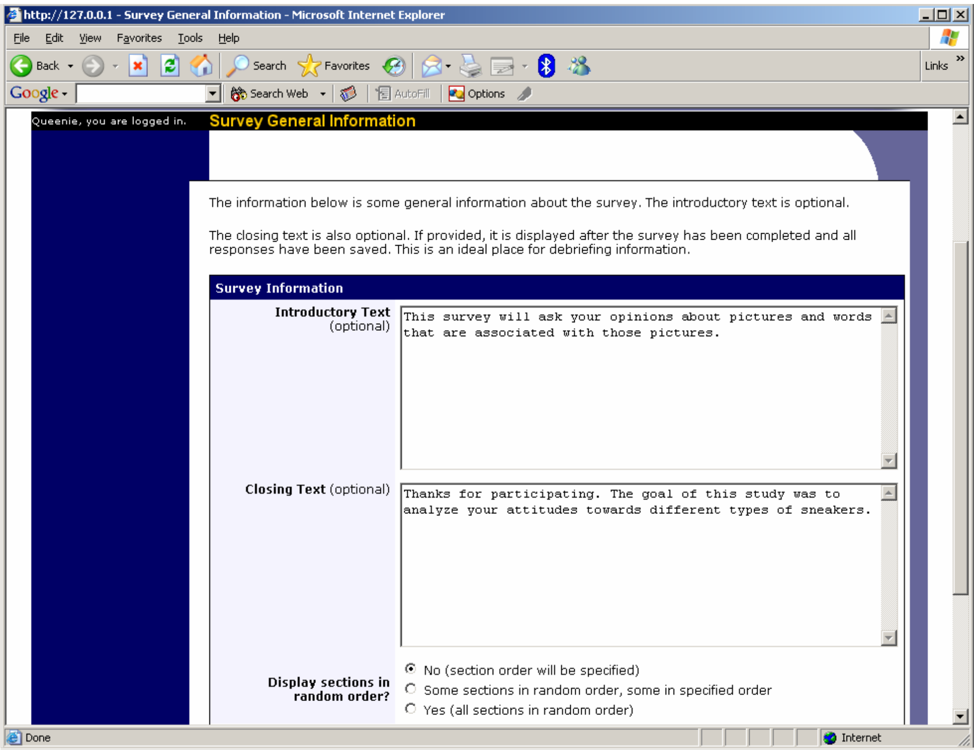


Figure 20 - Survey General Information

Section List

Depending on if you are adding or editing the survey, you will be taken to the list of sections for the survey. Here, you can change the order that sections will be displayed (if you have not enabled full random section ordering for the survey), and see a quick review of each question. From here, you can add a question to any section and edit any question. To add a new section, choose the Add a New Section choice at the bottom of the page.

If you have enabled partial random section ordering, then you can specify a section order for the sections you would like to be displayed in a specified order. For the sections you would like to be displayed in random order, leave the Section Order area blank. When you specify a section order, use each number once, and use the numbers 1-98 if you would like the section to be displayed *before* the random-ordered sections, and the numbers 100-199 if you would like the section to be displayed *after* the random-ordered sections. Be sure to use each number only once, or leave the number blank to make the section part of the random-ordered section. Sometimes it is useful to use partial random ordering if you want to ask basic (e.g. demographic) information in the first few sections, while asking more analytical questions in the random-ordered sections. Likewise, you may want to ask about the previous random-ordered sections after they are completed.

There is also a Preview Section option so you may preview the survey as participants will see it.

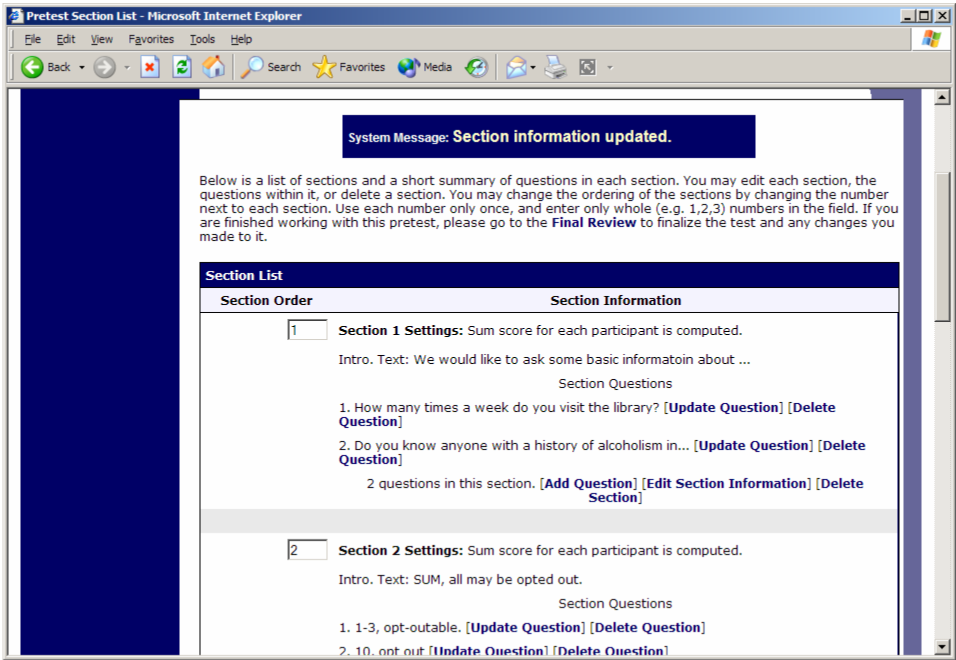


Figure 21 - Survey Section List

Adding or Modifying a Section

To add a new section, choose the Add New Section link at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.

There are three pieces of information you may provide for each section. First, you may specify some introductory text to be displayed at the beginning of the section. When participants take the survey, they view one section at a time, and all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in that section. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).

You may choose if the questions for that section are displayed in random order or the order in which they are entered.

You may also choose to have the system compute a section sum or average (for each participant) for the section. These scores are computed only for all the multiple-choice, numeric questions in a section. Think carefully about setting this value, because you are very limited in your ability to change it after participants have started to take the survey.

Computed section sums or means are often useful when all the questions are using a unidimensional scale (1-5, for example), but a participant's average score response to the section is more useful to account for their outlier responses.

Depending on if you are editing or adding a section, after you save your changes, you will be taken to a page to add a new question or to the section list.

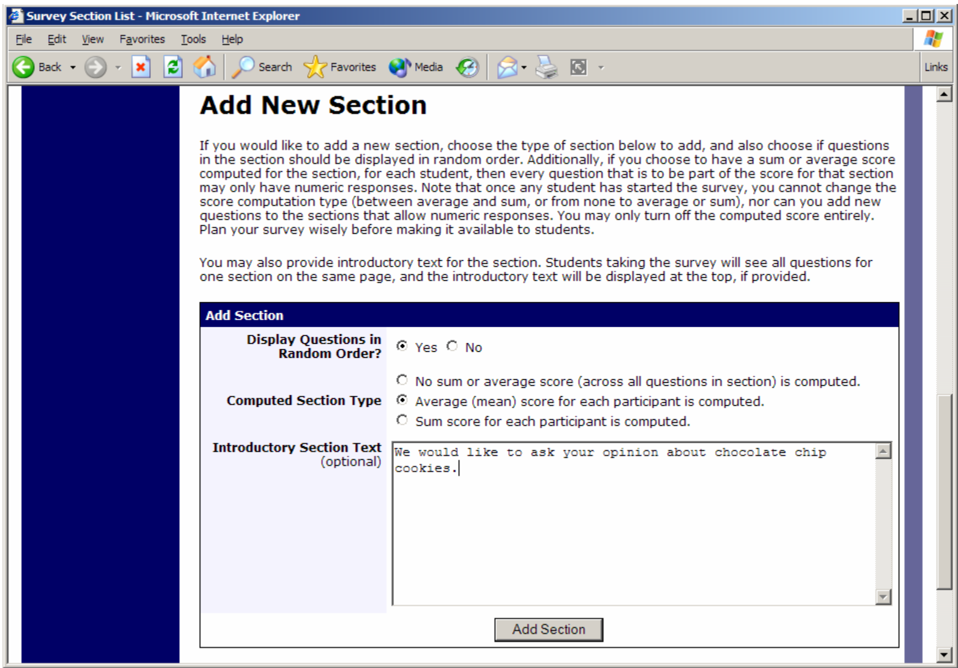


Figure 22 - Add New Section

Adding or Editing a Question

To add or edit a question, choose the appropriate choice from the Section List, next to the desired section. Depending on the state of the section and if participants have taken the pretest, some options will be automatically set for you, and not changeable. All fields must be filled out.

Field	**Description**
Question Text	The text for the question. This will be displayed above each question's choices.
Abbreviated Question Name	An 8-character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format. Many statistical analysis programs limit column names to 8 characters.
Question Type	Multiple Choice (select one), Multiple Choice (select many) or Free Entry. If the section has a computed average or sum, you may be limited in your ability to add

	Multiple Choice (select one) non-numeric questions. Free entry choices may contain a response up to 255 characters in length.
Display choices in random order?	If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple choice questions.
How should the choices be displayed?	Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed. Often, the horizontal display is effective when the question involves a scale. This setting applies only to multiple-choice questions.
Can participants decline to provide an answer for this question?	If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question.
Are all choices numeric?	If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple choice questions. Sections with a computed section sum or average may not contain non-numeric multiple choice (select many) questions.
Display numeric value?	If set to No, the numeric value of the choice is not displayed to participants. This only applies to numeric, multiple-choice questions where each choice includes both a numeric value and associated text (e.g. "5 Strongly Agree"). This is useful when running a reverse scale.

If the question is a multiple choice question, you must also fill out the choices section that is part of the same form. A minimum of 1 choice must be provided for the question. Each choice may be up to 255 characters in length. If the question is specified as numeric, you must provide a numeric choice, and that choice must be a whole number (e.g. -5, 1, 0, 349). If you would like to provide descriptive text to accompany each numeric choice, you may do so by typing in the numeric choice and leaving one blank space after it, then typing in the descriptive text, for example: "5 Strongly Agree". If you provide descriptive text along with the numeric choice, then you have the option of hiding the numeric value from participants, by choosing No to the "Display numeric value?" setting for the question. This is useful in reverse scale or other situations where the numeric value for the choices is not important.

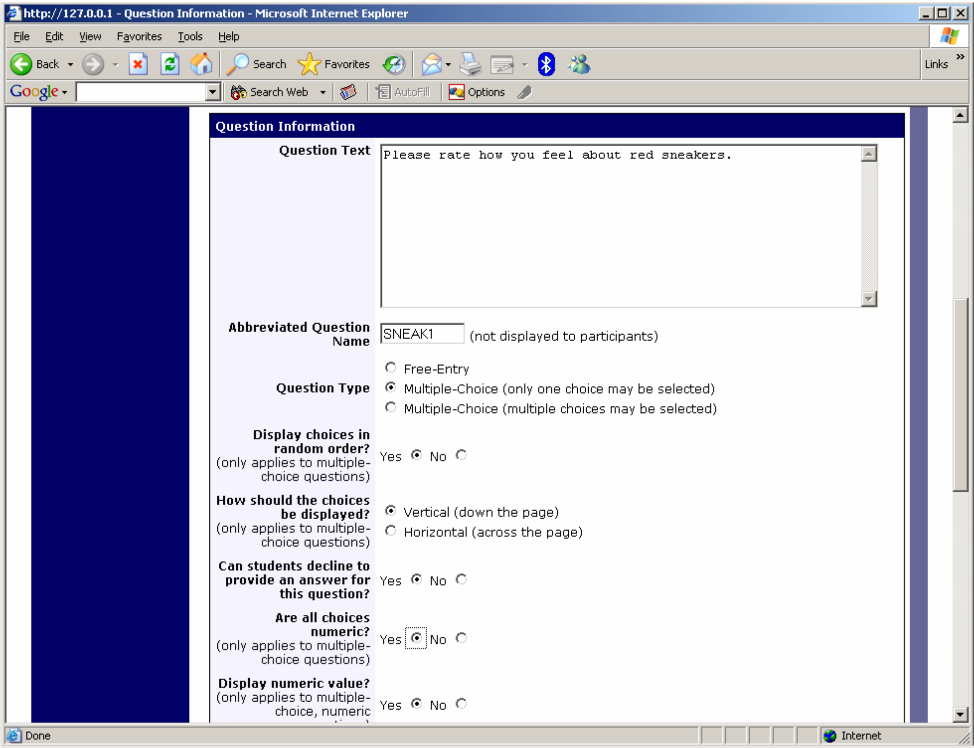


Figure 23 - Edit a Question

Copying a Section

You may copy a section from any of your own surveys into your current survey, by choosing Copy From an Existing Section in the Section List. You will see a list of eligible surveys to copy from. After you choose which survey to copy from, you will see a list of eligible sections in that survey. Once you choose a section, it will be copied into the survey you are currently editing.

The administrator also has the ability to copy to or from the pretest, so ask the administrator to do this for you, if you need it done.

Copying a Question

For multiple-choice questions, it is often the case that many questions have the same measures (choices). To make entry of similar questions easier, you may use the Copy Question feature to copy a question. Such an option is only available for multiple choice questions. To copy a question, select the question you would like to copy (when viewing the Section List). You will then be taken to a list of sections where you may copy this question to. After you decide which section you would like to copy the question to, you will be taken to a page where you can make any final changes to the copy of the question before saving it.

Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing of the survey later, it is **imperative** that you go to the Final

Review step, as the system needs to save certain special changes and make some computations. If you do not want participants to participate in the survey yet, you can save changes but keep the survey inactive. When you save your changes, it may take a moment to save all the changes, as the system is performing a number of computations on the survey. Please be patient, as these computations are done to make performance for participants as fast as possible.

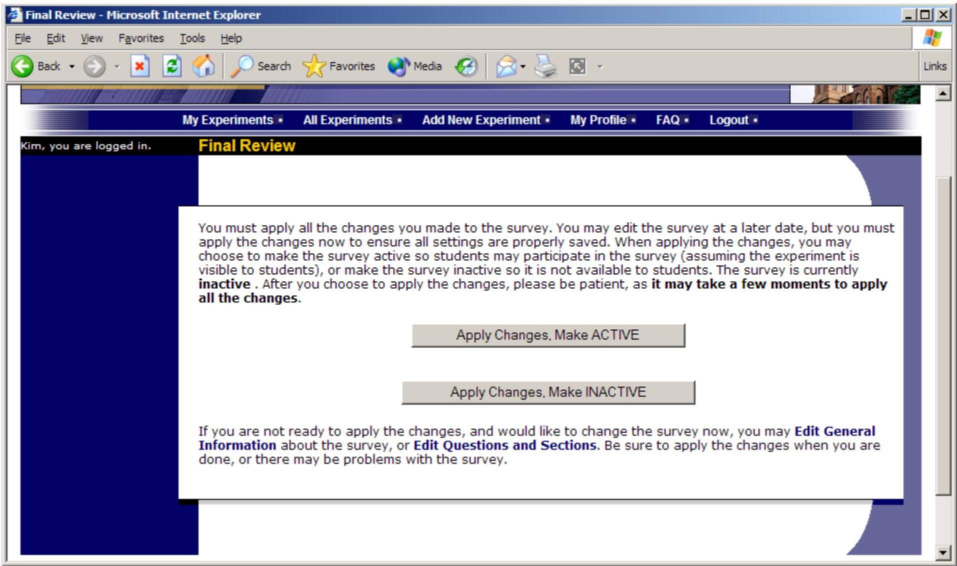


Figure 24 - Saving Survey Changes

Deleting a Participant's Survey Responses

On rare occasions, you may want to delete a participant's survey responses, usually so they can participate again. To do this, cancel their sign-up and that will delete their responses. Note this will also remove any credit they earned. See Manual Cancellation for more information.

Analyzing Survey Responses

You may analyze a specific survey question on-screen by selecting the survey and choosing the Analyze Survey Responses option. From there, you may choose a specific question and view or download the response data.

More likely, you will want to analyze the survey data across all questions. In this case, you should choose the Download Survey Responses option.

To successfully analyze the data, you will need to download 2 sets of data. The first is the question key, which lists a unique numeric identifier for each question, along with the question text and abbreviated question name. It also includes the section number each question was in. Note the section number listed is merely a unique identifier for each section, and has no correspondence to the order in which sections were presented. Also note that section mean and sum values, if calculated, will normally be at the end of the list of questions. This data is in CSV format, and is available by clicking the Download Question Key link on the Download Survey Responses Page.

After you download the question key, you can download the survey data. The system may require that you download the data in sections if there is too much data to be downloaded as one file.

The data is in CSV format, and is presented as one row per respondent, with each of their responses in a different column. The first row includes the column headings, and the column heading map to the abbreviated question name. Since there is no facility to specify an abbreviated question name for the computed section sum/mean item, the system automatically assigns a unique name to those columns. You can use the question key to determine which question maps to which column.

There will be an option to include only the numeric response portion of questions that are multiple-choice with numeric choices. This is useful if the numeric question was set up with associated text, but that text should not be included in the analysis file. One example would be where the response selected was “5 Strongly Agree” but only the number 5 (and not the associated text) is useful during analysis.

If your survey has a lot of questions (and thus columns in the output file), you may have trouble loading the data with some spreadsheet programs, which are not equipped to handle such large datasets. Your best option is to use a full-feature statistical analysis packages, like SPSS or SAS. Those packages handle large CSV-format data imports with ease.

Working with Timeslots (Sessions)

Timeslots (also referred to as Sessions) are the available times when a participant may participate in the study. If you are setting up timeslots for a web-based study, please read the section in this documentation on Web-Based (Online) Studies for some special information.

Timeslots allow you to specify a date, time, location, maximum number of participants, and researcher for a session.

Timeslot Usage Restrictions

If enabled on your system, you may find there is a limit to the amount of time available for scheduling timeslots. This usage is computed by adding up all the past timeslots where credit was granted, and then adding all timeslots in the future, regardless of credit status. You may find that the usage goes down over time, as time progresses and timeslots that were in the future had no participants signing up for them. The usage and limit is listed whenever you add a timeslot, if usage restrictions apply. It may also be listed when you view your profile, depending on how your system is configured.

Timeslots Linked to Specific Researchers

If your system is configured to allow multiple researchers per study, you will also have an option to link timeslots to a specific researcher. 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 researchers linked to it, then only that researcher will be listed as the contact point when a participant receives any emails related to their participation in that timeslot. Finally, only the researcher connected to that timeslot receives related notification emails, such as participant cancellation notification, and reminder emails (assuming such emails are enabled).

It is also possible to have some timeslots where a specific researcher is linked to it, and others where all researchers (who are assigned to the study) are responsible for 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.

To use this feature, the system must be configured to allow multiple researchers per study. Then, the study itself must be configured to allow researchers to be linked to specific timeslots. Finally, the study must have more than one researcher connected to it.

Creating Timeslots

To add a timeslot for a study, you must first choose the study that you would like to add a timeslot for. To view your studies, choose the My Studies option on the top toolbar. Click on the desired study, and choose the Timeslots choice.

You will see a list of any existing timeslots, and the Add A Timeslot option at the bottom of the page. Click on Add A Timeslot.

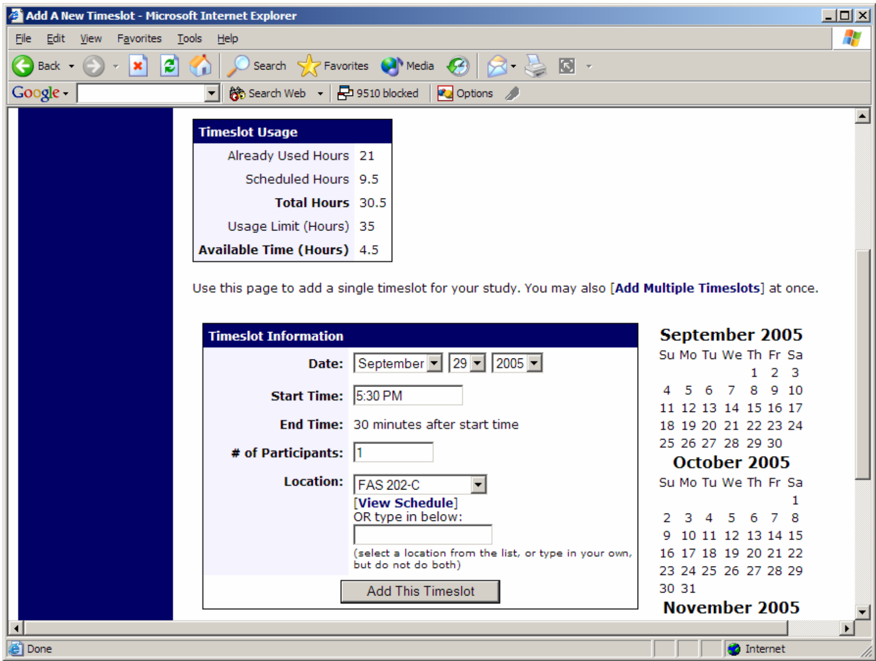


Figure 25 - Adding a Timeslot

The following table lists the information you may enter about a timeslot, along with an explanation. All fields are required.

Field	**Explanation**
Date	The date for the timeslot.
Start Time	The time for the timeslot. A sample time will be provided. If you want to change the time, please use the same format as the time you see presented. Note in particular how "a.m." and "p.m." are handled (if such a format is enabled on your system).
End Time	The time when the timeslot will end. This is computed automatically based on the duration you entered when you set up the study.
# of Participants	The number of participants for this timeslot. This limit is *not* visible to participants. They will only see whether the timeslot is full or not.
Location	The physical location where the study will take place, for this timeslot. It will be automatically filled with the location of the previous timeslot, when available, to ease in data entry. Depending on how your system is configured, you may see a list of pre-

	configured locations. You may choose any of those locations and click on View Schedule to see the schedule for a location. The system will automatically prevent you from adding a timeslot using a location that is already in use at the time you try to schedule the timeslot. If you do not see the location in the list that you plan to use, you can simply type in the location in the text field below it. The location field does not apply for web-based studies.
Researcher	The researcher assigned to this specific timeslot. The list will contain a list of all researchers for the study. Choose ALL if all researchers (for the study) should be assigned to this timeslot. See Timeslots Linked to Specific Researchers for more information.

To ease data entry, the system will automatically fill in the date, time, and location based on the ending time of the last timeslot for this study. If applicable, your current timeslot usage will be listed, and you will be prevented from adding a timeslot that would exceed your timeslot usage time limit.

If you add a timeslot such that there is another timeslot (for any study) that occurs in the same time, at the same location, you will receive a warning (but the addition will be allowed).

If you are running a web-based (online study), you should create a single timeslot with the participation deadline equal to the last day you would like to run the study. For number of participants, specify the maximum number of participants who may participate.

Creating Multiple Timeslots

If you would like to add multiple timeslots at once, choose the Add Multiple Timeslots link. You may choose to add a specified number of timeslots, or copy the timeslots from another week to a specified week. If you choose to copy, the system will copy the time, location, and number of participants for the specified week to the desired week, for each day of that week (starting with Monday).

If you choose to create a specified number of timeslots, you can choose the number of timeslots you would like to add, the start time and date, and the amount of time between each timeslot (to allow for breaks). You also may specify that timeslots that would occur outside normal business hours be shifted to the next business day. On the subsequent page, you may change any of it to deal with special cases. Timeslots that you attempt to add, that either have errors or would result in exceeding the timeslot time usage limit, will not be added. This feature is not available for web-based (online) studies, as web-based studies rarely have more than one timeslot.

If you would do not want to add a specific timeslot that is listed, choose No in the Add This Timeslot? Column.

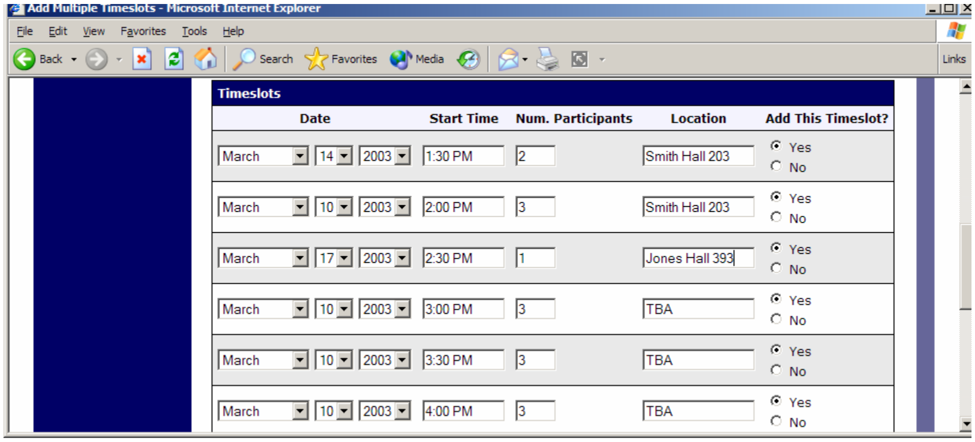


Figure 26 - Creating Multiple Timeslots

Modifying and Deleting Timeslots

To modify or delete a timeslot for a study, you must first choose the study that you would like to deal with. To view your studies, choose the My Studies link from the top toolbar. Choose the Timeslots option in the timeslots column for the desired study. You will see a list of all recent timeslots. Recent timeslots in the past with no participants signed up will not be displayed. To work with timeslots more than a few days old and to see all timeslots, you will see a link to view all timeslots for the study. Select the timeslot you would like to deal with, and click the Modify button.

If the timeslot has no participants signed up for it, you will see a Delete button. You may not delete a timeslot that has participants signed up for it. If you would like to delete the timeslot, click the Delete button, and you will see a confirmation page. Choose Delete again to delete the timeslot.

If you would like to modify the timeslot, modify the desired information and click the Update button just below the timeslot information. It should be noted that participants will *not* be notified (by email) of any changes you make to the timeslot, so you should contact them if information needs to be passed on to them (a link is provided on the same page to do so). If you change the maximum number of participants to a lower number than it was before, the system will *not* cancel the sign-ups for any participants who are over the new limit of participants. Generally, researchers only update timeslots with sign-ups to update the location, if it was not available when the timeslot was originally created.

If the study (or researcher) is subject to timeslot time usage restrictions, the system will enforce them and prevent you from increasing the number of participants in a timeslot if that would result in exceeding the timeslot usage limit.

Deleting Multiple Timeslots

If you would like to delete multiple timeslots at once, you may do that as well. Such a feature is only available for timeslots which have no participants signed up. To do so, select the desired experiment and choose Timeslots. At the bottom of the Timeslots page, you will see a Delete Multiple Timeslots option. The option may not appear in certain cases where such an option is not available because of a lack of available timeslots to delete.

After going to that page, you will see a list of timeslots eligible for deletion. Choose the timeslots you would like to delete, and choose Delete Selected Timeslots to proceed.

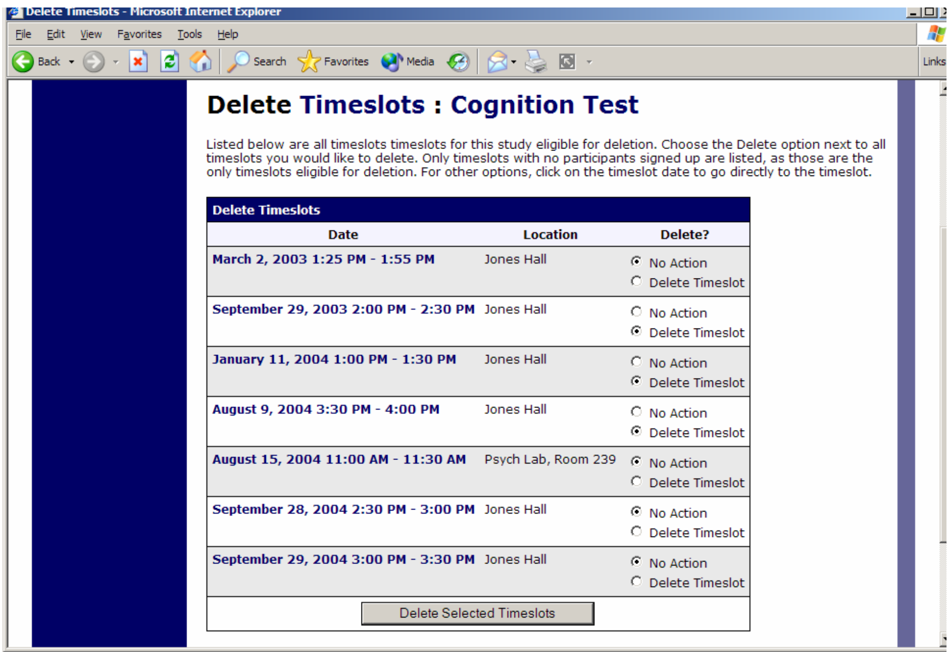


Figure 27 - Delete Multiple Timeslots

Manual Sign-Up

If enabled on your system, you may manually sign up participants for your study. There are a number of situations where this is desirable. If the participant happens to show up for a timeslot they were not signed up for, and you elect to let them participate, you can sign them up on the spot for the timeslot. The participant in many cases cannot sign up on their own in this situation, because the sign-up deadline has passed. You may also sign up a participant for a study that has already occurred, if necessary.

Also, a manual sign-up overrides any restrictions you have placed on the study (e.g. pre-requisites), though you will be warned if you are overriding any restrictions.

If the system is configured as such, the participant will receive an email when you sign them up for a study. In that case, you are also given the option to enter comments to be included in this email that may better explain to the participant why they were signed up. You may only sign up participants for your own study.

To sign up a participant for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on Timeslots for the desired study, then select the timeslot you would like to deal with, and click the Modify button.

At the bottom of the page, you will see a Manual Sign-Up option, if it is enabled. Type in the participant's User ID (you may have to ask them for this) and click Sign Up. If enabled, you may also choose to sign up a participant using their unique ID code. You may also have the choice to enter their last name and choose from a list of participants. In all cases, after submitting the form, you will see a confirmation page that also lists any restrictions on the study. Choose Sign Up to complete the sign-up.

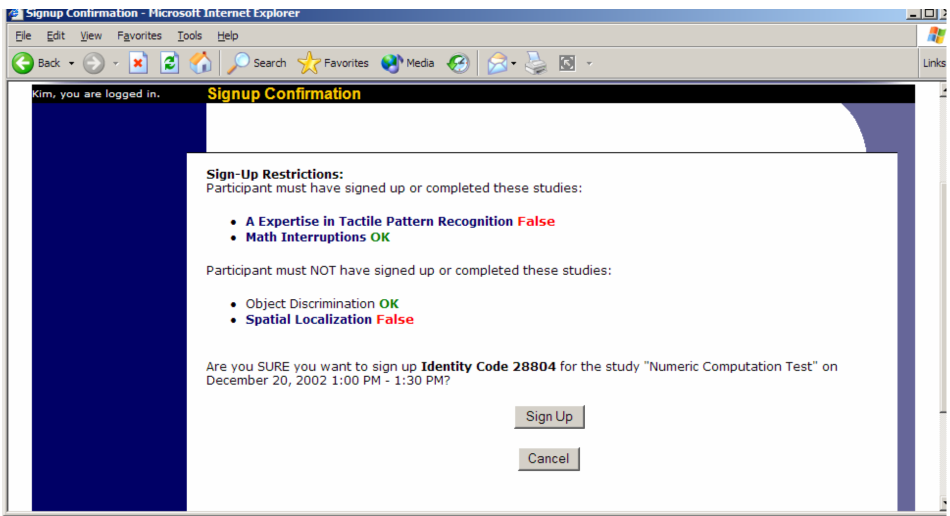


Figure 28 - Manual Sign-Up Confirmation

If you are subject to timeslot time usage restrictions, the system will enforce them and prevent you signing up a participant in the timeslot if that would result in exceeding your timeslot usage limit.

If you are doing a manual sign-up for a two-part study, you must do a manual sign-up for each part separately. The system will overlook the scheduling range restrictions as well.

You cannot use the manual sign-up feature for online survey studies, because the sign-up for the study is integrated with the administration of the survey.

Manual Cancellation

If enabled on your system, you may have the opportunity to cancel a participant's sign-up. You may only cancel sign-ups that are in a No Action Taken state. To cancel a sign-up, find the desired timeslot and participant, and click Cancel next to their name. The participant will be emailed an email about the cancellation, along with a confirmation code, and their sign-up will be immediately cancelled.

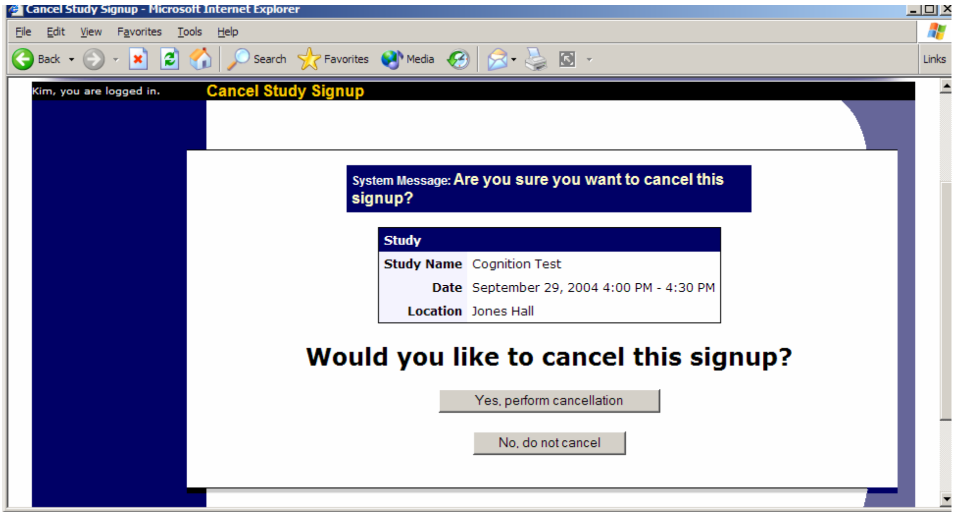


Figure 29 - Manual Cancellation

Viewing the Participant List

To view the list of participants who have signed up for your study, you must first select the study and timeslot you wish to see. To view your studies, choose the My Studies option from the top toolbar. Click on the Edit link in the timeslots column for the desired study, then select the timeslot you would like to see, and click the Modify button.

The list of participants, along with their email addresses, will be listed. If ID codes are enabled, you will only see an ID code and no name or email address for each participant.

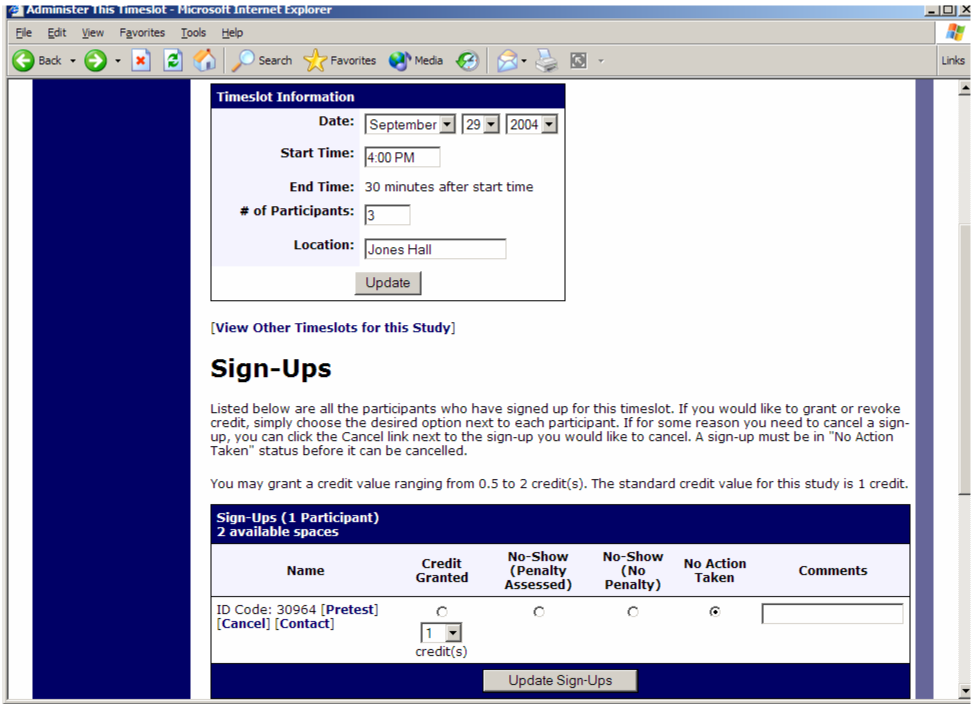


Figure 30 - Modifying a Timeslot / Participant List

Viewing Pretest Responses

If online pretests are enabled on your system, and you are also allowed to view an individual participant's pretest responses, then you will see a Pretest link next to each participant's name (or ID code) when you view the information for a timeslot. Click on that link to view the participant's pretest. If you would like to download the pretest data for all participants in your study, choose the Download Pretest Responses option after clicking on your study. That will allow you to download all the data at once, in CSV (comma-separated) format, for further analysis.

If you would like to analyze responses in aggregate (across all participants in the system), see Analyzing Pretest Responses in this documentation.

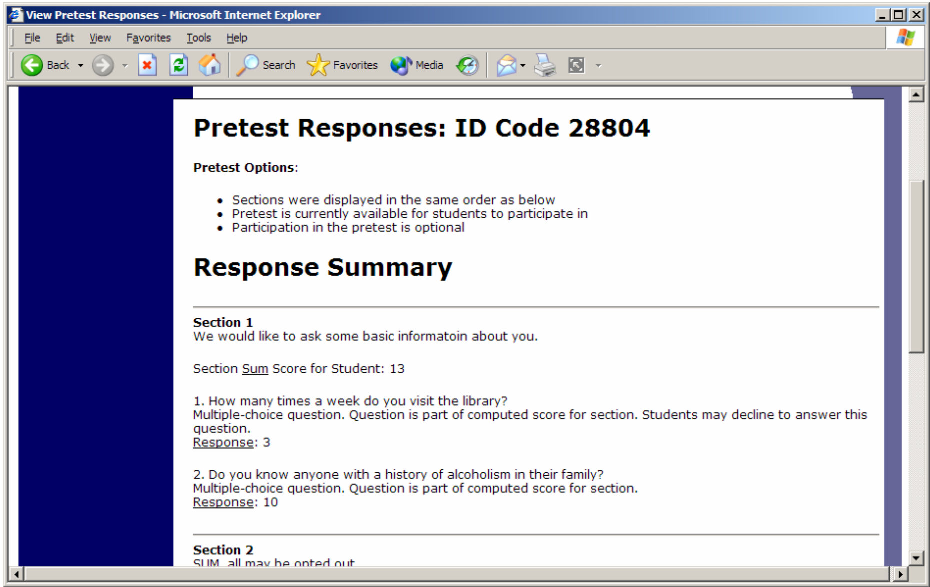


Figure 31 - Viewing a Pretest

Granting or Revoking Credit

At the completion of a session, you should promptly deal with the participants, in the system, to ensure proper credit grants. The reason for the prompt handling of this situation is in the event your study is a pre-requisite for another study, and a few other situations. You do not want to hold up other studies that are waiting on your response to the study you just ran.

To grant or revoke credit for a timeslot, you must first find the desired study and timeslot. To view your studies, choose the My Studies option from the top toolbar. Click on the Edit link in the timeslots column for the desired study, then select the timeslot you would like to see, and click the Modify button.

You will see a list of participants, identified either by name or ID code. If the participant properly participated in the study, click the Credit Granted button next to their name. If the participant did not appear for the timeslot, choose the Participant No-Show? button. Depending on how your system is configured, you may see two “No-Show” options. One option allows you to assess a penalty, and the other does not. Studies that are for pay only will always have only one type of No-Show option. You may choose not to assess a penalty if the participant had an acceptable reason for failing to attend the study.

Depending on how your system is configured, you may see an option to grant a credit value that is different from the standard credit grant. This is useful when you want to grant a participant a lower credit value because they left the study early (if they deserve a lower credit grant), or a higher credit value if the study ran longer than expected. The default value that is selected is the study’s standard credit value. If this is enabled, then you may also grant 0 credits. This is useful if you do not want to grant credits to the participant, but you also want to prevent them from participating in the study again. If a participant is granted 0 credits, and the study is set to prevent duplicate sign-ups, then the participant will not be able to sign up for that study again.

If desired, enter any comments about the session in the Comments section (generally, this is used to indicate the reason for denying credit). Participants will see anything you enter in the Comments section for their sign-up, and these comments will be included in the email sent to participants when a credit grant/revocation occurs, if notification emails are enabled on your system.

Click on the Update Sign-Ups button at the bottom of the list of sign-ups to save your changes. Credit will be granted or a penalty assessed as necessary. The participant(s) will be emailed about this if the system is configured in such a manner.

It is not recommended to leave any sign-up for a timeslot that has occurred in the "No Action Taken" stage. This is a credit "limbo" and the system will warn you upon your next login about the offending timeslot that has not been dealt with properly. Note that if Manual Cancellation is enabled and you would like to cancel a participant's sign-up, the sign-up must be in No Action Taken state.

Depending on how your system is configured, the system may automatically grant credit to participants for timeslots that are more than an administrator-specified number of hours old, and where the researcher has taken no action. You can always change the automatic credit grant later if it was in error. The automatic credit grant takes place once a day, usually overnight. Your administrator can let you know if such a feature is enabled on your system.

If you need to do a simple credit grant across many timeslots, see the Uncredited Timeslots section which offers such a feature.

Batch Credit Granting

In some cases, you may wish to automatically sign up and immediately credit a group of participants. This is often useful if you administered a study on an ad-hoc basis, and you want to credit participants after the fact.

To do so, go to the appropriate timeslot (you may want to create a timeslot specifically for this purpose), and click on Modify Timeslot. In the Manual Sign-Up section (if enabled), you will see a Batch Credit Grant link. Click that and you can provide the list of User IDs of users you would like to sign up and credit. Users will be signed up and credited immediately. This feature overrides any sign-up restrictions on the study, just as a normal manual sign-up does.

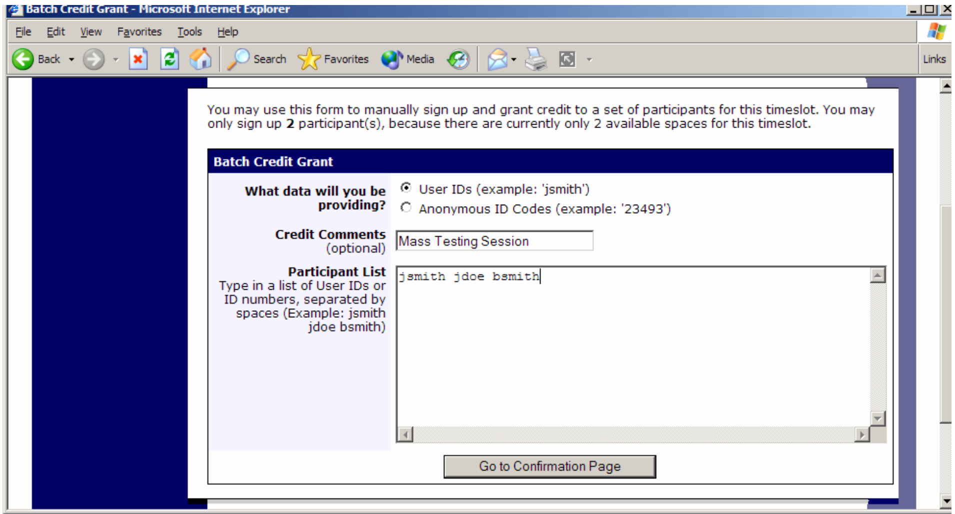


Figure 32 - Batch Credit Grant

Emailing Participants

If you wish to contact participants in a particular timeslot for any reason, you may click on the Contact link that will appear next to each participant's name (or ID code) to contact an individual participant. To email the group of participants for a particular timeslot, click the Contact All Participants choice at the bottom of the Modify Timeslot page for that timeslot.

You will be taken to a page where you can fill out a message that the system will send to the selected participants. The message is auto-filled with some basic information about the study, so participants are aware of which study you are referring to. You may remove this information if desired. You may choose to receive a copy of the email that you send.

Depending on how your system is configured, participants may already be receiving a reminder about upcoming studies the day before they are scheduled to participate. Ask your administrator for more information.

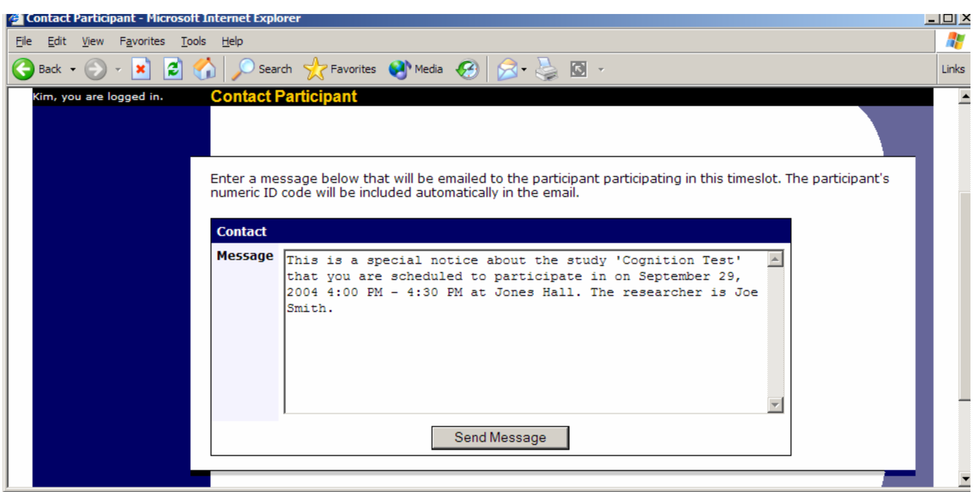


Figure 33 - Contacting Participants

In some cases, you may find it useful to contact all participants for the study, across all timeslots. This feature may be particularly useful if you are sending debriefing information when a study has concluded. To do so, go to My Studies, click Study Info. next to the desired study, and choose the Contact Participants option. You will then be able to select which group of participants to send to, and a message to send. Messages will be sent in groups of 300 (or less, depending on how your system is configured) to avoid overloading email servers.

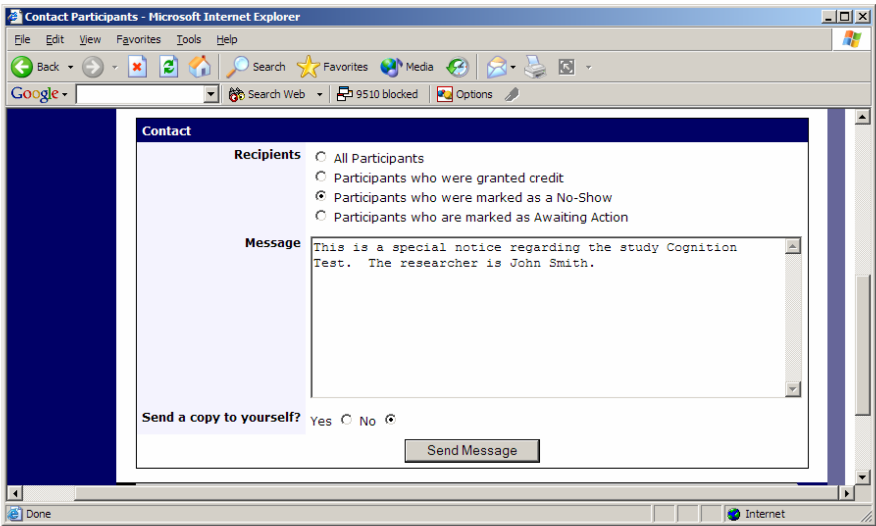


Figure 34 - Contact Participants

Viewing Uncredited Timeslots

When you login to the system, you will receive a warning if you have any timeslots that are more than 2 days old and haven't been dealt with. You may view a list of all timeslots that have not been dealt with by choosing the View Uncredited Timeslots option from the My Studies page. The timeslots for online studies, including those in the future, are always considered in need of a response. See the Web-Based (Online) Studies section of this documentation for more information.

If you would like to do a simple credit grant (standard credit grant, no comments), you may do so directly from this page. Select the desired sign-ups/timeslots, and then choose Grant Credits. The action may take a short time to complete, so please be patient while the credit grants are processed.

If you need to do something more complex, like mark a no-show, add comments, or do a special credit grant, you can easily click on the timeslot's date and time, and go directly to that timeslot.

In cases where a study has timeslots linked to specific researchers, you will see the warning only for timeslots that are specifically linked to you, or to everyone in the study (i.e. not timeslots linked to someone else in the study). However, when you view uncredited timeslots, you will see all uncredited timeslots for your studies, even if someone else is linked to one of the timeslots for your study. This is done to make it easier to give your fellow researchers (for your studies) assistance in dealing with uncredited timeslots.

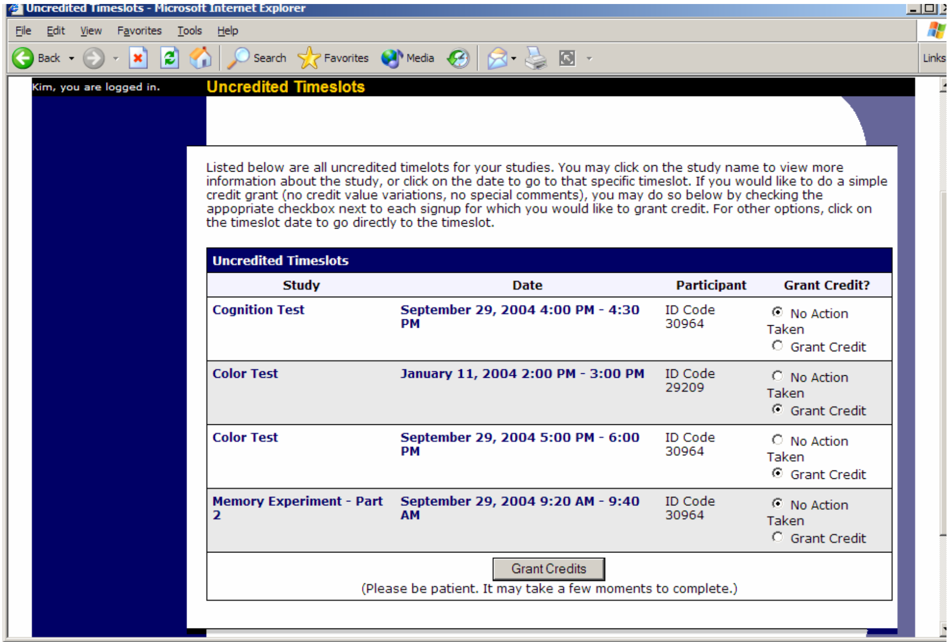


Figure 35 - Uncredited Timeslots

Analyzing Pretest Responses

If online pretests are enabled on your system, then you might also have the opportunity to analyze pretest responses in aggregate or as raw data. Choose the Pretest Results option from the top menu bar. You can then select which question you would like to analyze, and whether you would like to see summary data or raw data (in CSV format) for the selected question. The raw data will identify each participant only by a unique ID code, not by their name, for privacy reasons. If for some reason you need the participants' real names, ask the Administrator to run the same analysis, as they can also pull the real names with their report. This gives you access to all pretest data across all participants in the system.

If you would like to analyze the pretest data for just those who participated in your study, select the Download Pretest Responses after clicking on your study. See Viewing Pretest Responses in this documentation for further information.

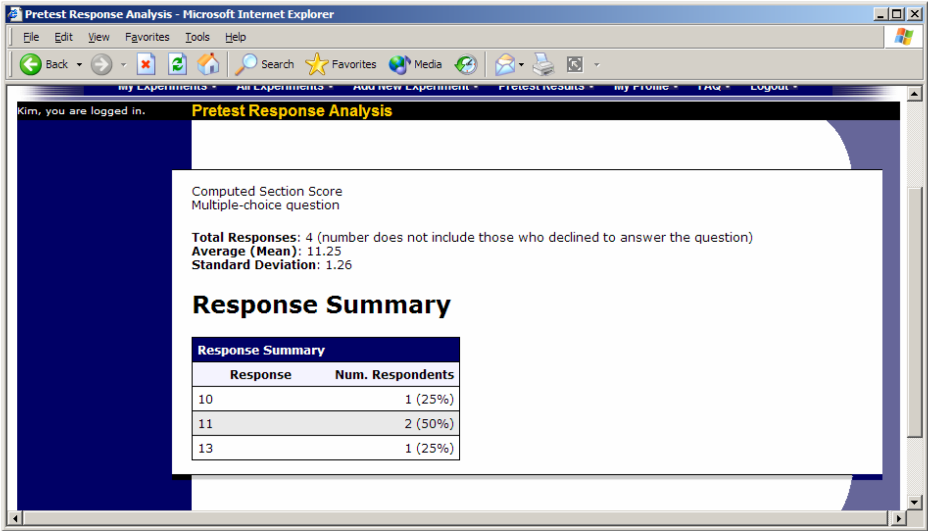


Figure 36 - Pretest Response Analysis

Pretest Qualification Analysis

If you would like to get an idea of how many participants meet a set of requirements (for help in setting pretest restrictions on your study), use the Pretest Qualification Analysis link from the Pretest Responses page. Using this feature, you can select multiple questions (only questions that qualify for study participation restriction are listed), and then the desired responses for those questions, and you will see how many participants meet that criteria.

If enabled, you may also contact participants and invite them to participate in any of your studies. Be sure to include information about how to sign up for the study in your communication to them, as a direct link to the study is not provided in the email. The email is sent in a fashion that protects the participants' identities from the researcher. You may also choose to email only a random subset of those who meet your chosen criteria, in the event that you are worried about inviting too many participants and there are a limited number of available timeslots. Depending on how your system is configured, the administrator might also receive a copy of your email, for review purposes.

Frequently Asked Questions (FAQ)

Why do I have to acknowledge the Human Subjects Policy?

Certain regulations and research guidelines either require or recommend it. You only need to do it once every 6 months, so it should not be too intrusive. You will not be asked to acknowledge the policy if this feature is disabled by your administrator.

What is the best way to setup a for-pay study?

You may set it up as a pay study only (indication a compensation amount), or a credit study if it is for both pay and credits. See the Studies for Pay section of this documentation for more information.

I want a participant to participate in an upcoming session, but the system says it is too late for them to sign up. What do I do?

If enabled, you can perform a manual sign-up. See the Manual Sign-Up section of this documentation. If not enabled, your administrator can still perform a manual sign-up.

Where are email notifications to me sent?

Email notifications (e.g. sign-up notices) are sent to either an address derived from your user ID or your alternate email address. See the Email Address Options section of this documentation for more information.

How do I deal with dyads?

A dyad is a study which requires a pair of people to participate, but often the second participant is not a "real" participant, but rather a colleague of the researcher who is "colluding" with the researcher as part of the study itself.

You do not need to deal with dyads in the system itself. Participants cannot see how many people have signed up for a timeslot, nor how many spaces are available for a timeslot. So, your "fake" participant can just act like a real participant and the real participant will be unaware of this.

I have finished running my study. What should I do?

So it does not clutter the list of studies for participants, you should make the study Inactive. See the Updating a Study section of this documentation for more information.

Who has access to my studies?

All users can see the information about your studies and the available timeslots. Administrators, the principal investigator (if applicable) and the creator of the study are the only people who can see who has signed up, and modify the study.

Regulatory Compliance Guidelines

Introduction

This software complies with all major regulations governing human subject research and privacy of data stored online. The system complies with both HIPAA and Common Rule for customers in the United States. For customers in Canada, it complies with the Personal Information Protection and Electronic Documents Act as well as the Tri-Council Statement. For customers in the European Union or in countries that follow OECD rules, it complies with OECD privacy rules and the European Union Directive of Data Protection. Your organization may or may not need to comply with the relevant regulations. Your subject pool administrator can advise you on this situation.

Even if you are not required to comply, compliance is still a good idea, as protecting sensitive data is always a good thing. Compliance in the context of this system is as simple as reading the remaining paragraphs of this section (that apply to your organization) and following the guidelines contained therein. The remaining compliance issues involving software, privacy and electronic data storage are all handled automatically by the software. You should still consult with your IRB or organization to be sure there are no additional compliance rules you must follow outside of use of this software (the handling of the data you collect during your study would be one example).

Some regulations (particularly the US HIPAA regulations) are focused primarily on health data. You may think the system does not store confidential health data (in HIPAA terms, it is called PHI -- Protected Health Information), but depending on how your organization uses the software, there may very well be confidential data in the system. Consider the case of a study that requires that a participant come from a family that has a history of mental illness. Merely knowing who signed up for that study is confidential because that type of information should not be revealed to the public. It may turn out that your studies are not of such a nature, but even more benign situations, like a study that requires that participants be regular contact lens wearers, can be construed as confidential information. Organizations typically err on the side of caution given the criminal and civil penalties for violation of these types of regulations.

Data Handling and Security Guidelines

In your role, you have access to your studies and you can see who has signed up for those studies. You may also have access to pretest responses. Because of these privileges, you should follow these simple guidelines:

- <u>Secure Your Account</u>. Use a password that is difficult to guess. The most secure passwords contain a combination of letters and numbers, do not spell a real word, and are at least 8 characters long.
- <u>Secure Your Work Area</u>. If you are logged into the system and you leave your computer, you should logout of the system or use a password lock on your computer. Ask your network administrator for help with setting up a password lock.
- <u>Handle Paper Documents Carefully</u>. Any printouts from the system should be kept reasonably secure. Store them in desk drawer out of the public view. Documents you decide to discard should be shredded if possible.

Human Subjects/Privacy Policy Acknowledgment

Upon your first login to the system, and every 6 months thereafter, you may be required to acknowledge your organization’s policy on these matters, and this acknowledgement will be logged. Ask your subject pool administrator if you have any questions.

INSTRUCTOR DOCUMENTATION

Introduction

The Experiment Management System is used for the scheduling and management of a human subject pool. As an instructor, your interaction with the system will be minimal, but also painless. Your primary use of the system will be to check on the credit status of students (participants) in your courses, though in some cases you may also have the ability to grant credits to your students, as well as view which studies are available to students.

Getting Started

The system works best if you use a web browser that is less than 2 years old. It works well with Internet Explorer version 4 and above, and Netscape version 4 and above. It will work with other web browsers, and with older version of Internet Explorer and Netscape, however the layout may not be as clean. No functionality will be lost by using an older web browser. Ask your system administrator if you need help with installing or using a web browser. 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 toolbar on the top to navigate anywhere on the site.

Logging In

To login, go to the front page of the site (you will be given the URL by a member of your organization) and type in your username and password. If you have forgotten your password and the system is configured to allow password retrieval, you will see a link where you may choose to have your password emailed to you. Once you login, you will be presented with a Main Menu with a few options.

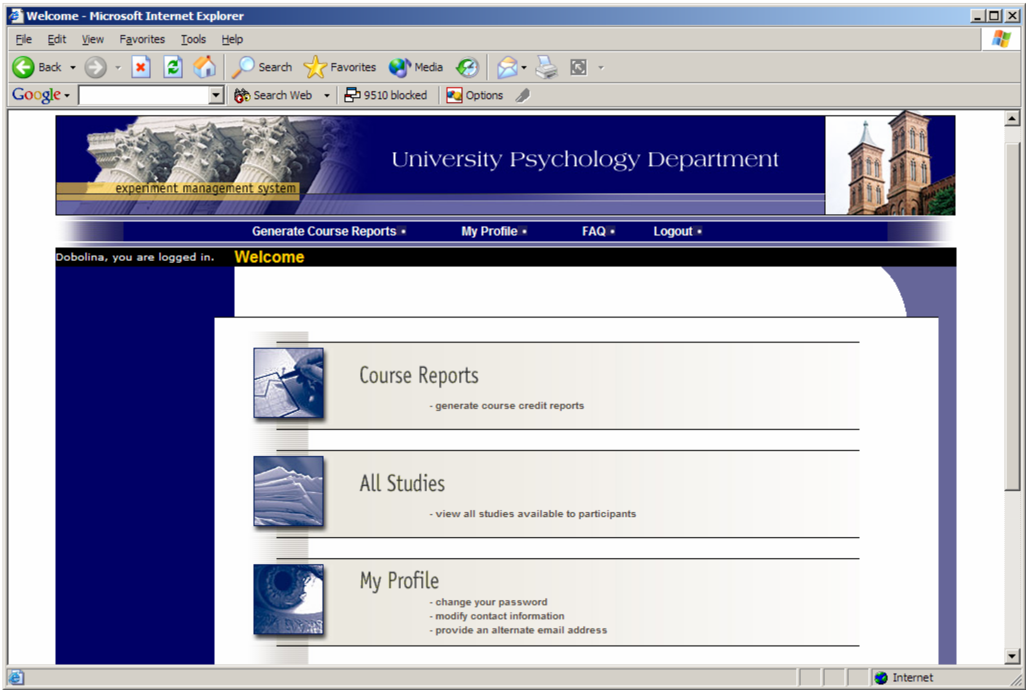


Figure 37 - Main Menu

Course Reports

On the Main Menu that you see after logging in, you will see an option to generate course reports. Once you click on that, you will see a list of all the courses you are an instructor for, and you have the option to generate reports for each of those courses.

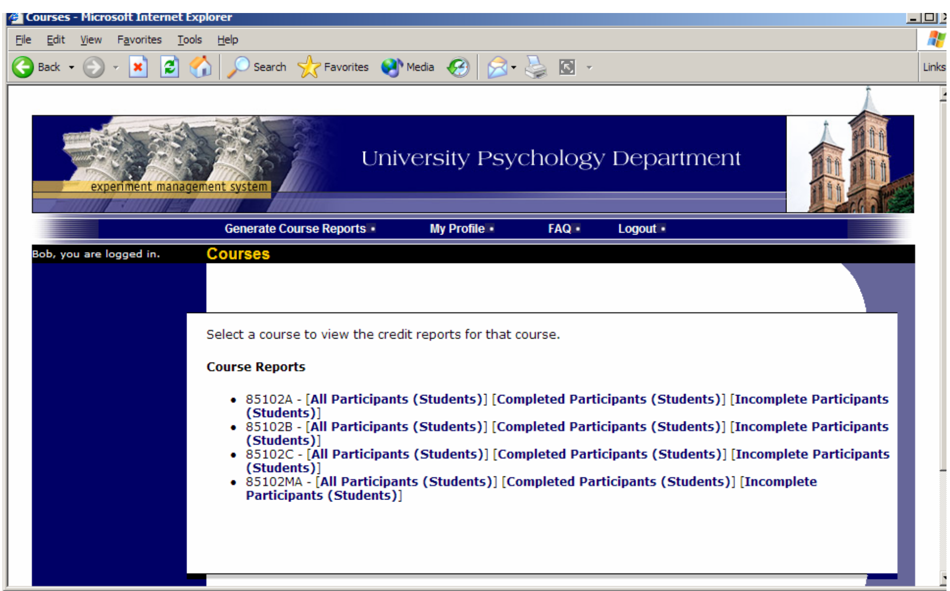


Figure 38 - Course Listing

You have 3 choices for the type of report you would like to generate. All Participants will list all participants in the course. Completed Participants will list only participants who have met or exceeded their credit requirements. Incomplete Participants will list only participants who have not met their credit requirements. Click the link for the desired report.

The report will be listed in alphabetical order by a participant's last name, and participants that have not completed their requirements will be highlighted in bold.

If your system is configured as such, you will see a credit status for the participant overall, as well as for the listed course. If this is the case, you should look at a participant's credit for the *course* to determine if they have completed their requirements. If you do not see such a column ("Credits Earned for Course"), then you only need to be concerned with the overall credit completion status for the participant. If you go to print the report and you find it is too wide for the page, change the output format from Portrait to Landscape, which is done in your web browser's print settings.

If you would prefer to deal with the information in CSV (comma-separated) format (for easy import into a spreadsheet program like Excel), use the CSV link at the bottom of the report to generate such a data file.

To generate a new report, choose the Main Menu link from the left toolbar and proceed from there.

Granting Credits

In some cases, you might see a Grant Credit choice next to each name when you generate a course report. If you click on this link, you can grant a non-study credit grant to that student. This is useful if you are in charge of granting a student credit for participation in a research alternative (e.g. writing a paper), in lieu of actual research participation. To grant the credit, simply enter the credit value and a comment about the credit grant, and the credit will be granted immediately.

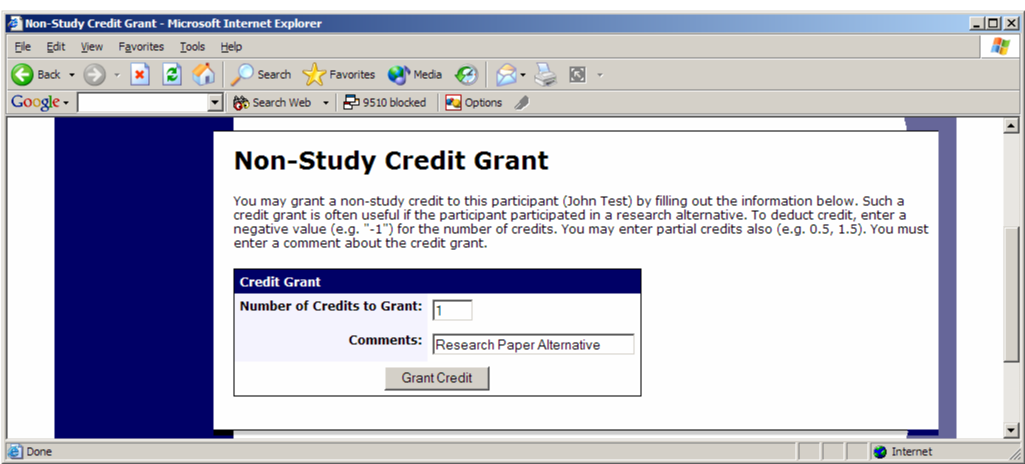


Figure 39 - Non-Study Credit Grant

Viewing Studies

In some cases, you may have the ability to view what studies are available in the system (to students). This is useful if you want to discuss information or concepts from those studies in class, as a part of the educational experience. If such an option is available, you will see an All Studies link after you login. If you click this, you will see a list of studies, and you may then click on any study to view more about it. For privacy reasons, you may not see who has signed up for any of the studies.

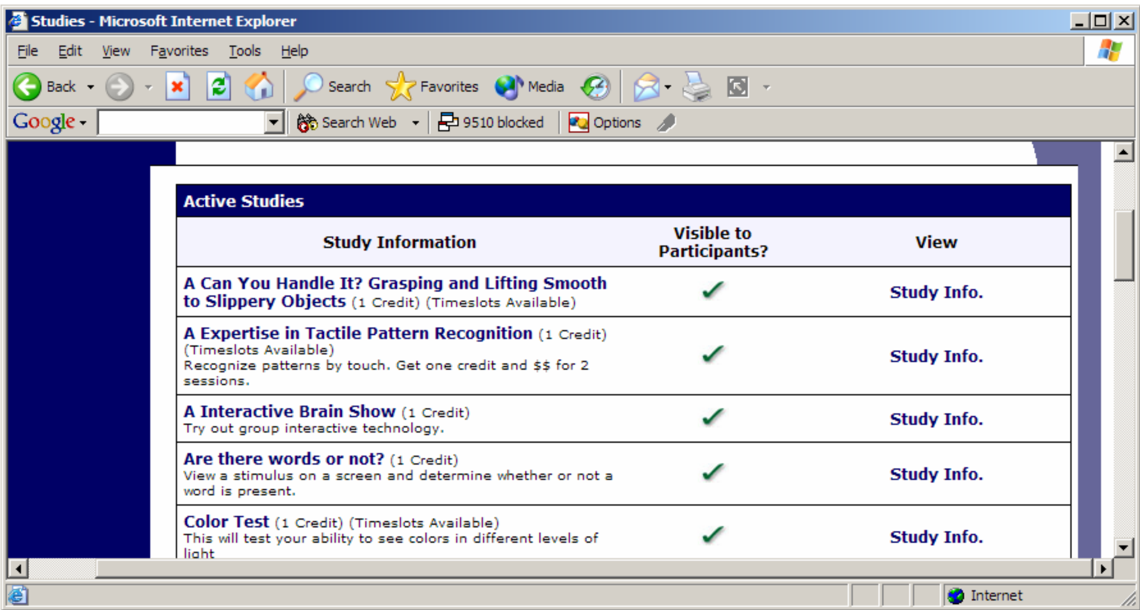


Figure 40 - Viewing Studies

Changing Your Password

To change your password or other information, choose the My Profile choice from the toolbar. Fields marked with (+) are optional and do not need to be filled out.

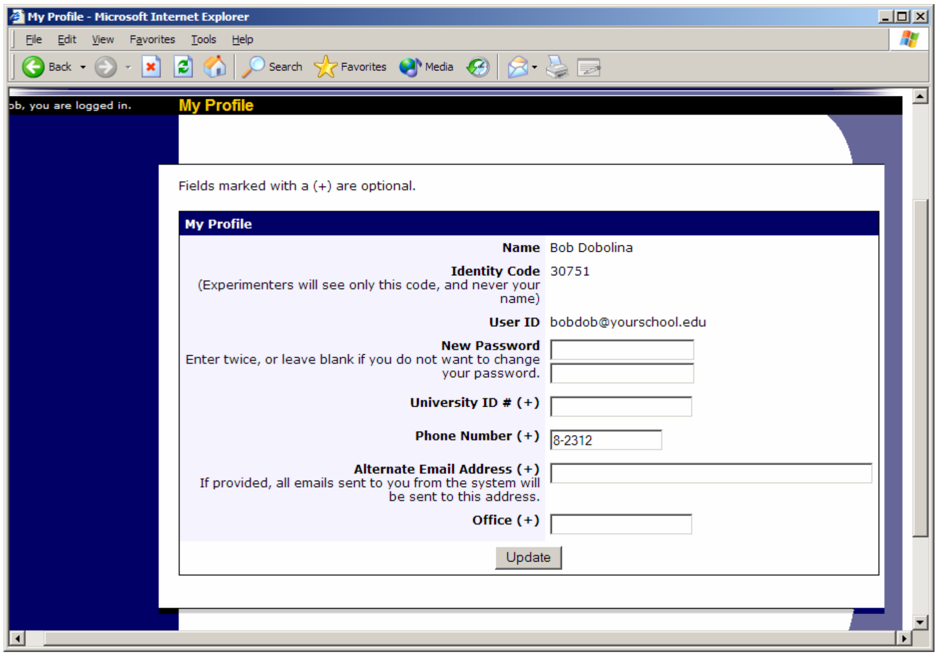


Figure 41 - Updating Your Profile

Logging Out

When you are done using the system, choose Logout from the top toolbar to log out. You are now logged out. It is always a good security measure to close all your browser windows as well, especially if you are using a computer that is shared by others.

ADMINISTRATOR DOCUMENTATION

Introduction

As an administrator, you will need to perform many tasks that only an administrator has the rights to perform. Though the number of tasks may seem daunting at first, you will quickly realize that everything is rather straightforward, and should take a minimal amount of your time. For your convenience, we have included a section of Typical Administrator Tasks to get you up and running quickly, while tasks are further detailed later on in the documentation. It is assumed your system has already been setup with your organization's configuration specifications, as a result of a consultation with a Sona Systems representative. Details of the configuration settings are provided later in the documentation (see System Settings).

Getting Started

As an administrator, you were provided with a login and password to access the system, as well as a URL (web address). To login, you should go to the specified URL by typing it into your web browser. It is recommended that you use Internet Explorer 5.5 or higher, or Netscape 6.0 or higher, for optimal performance. Both web browsers are available for free download. The software will work with older web browsers, though the layout and display might not be as streamlined.

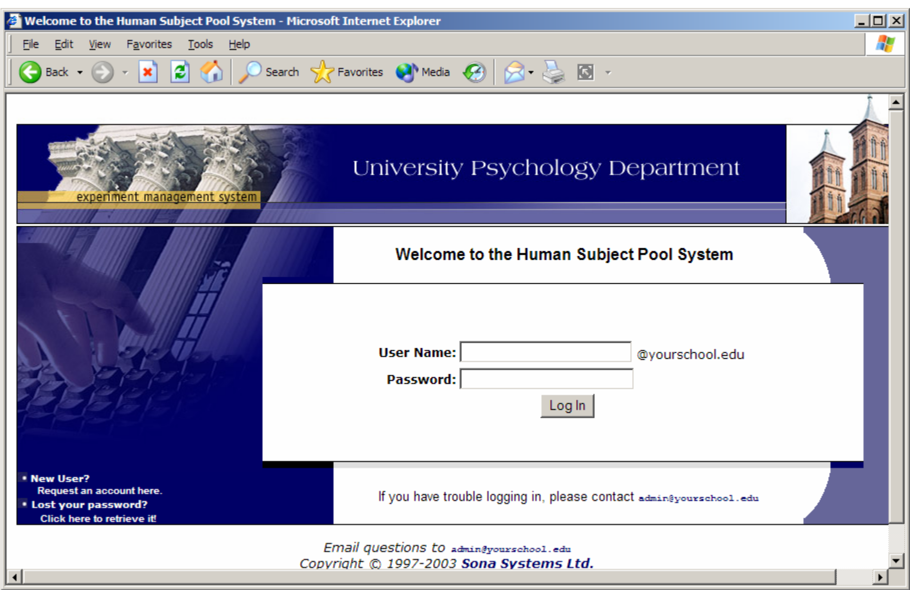


Figure 42 - Login Page

You will note from the front page of the site that a login is required. It is required of every user on the system. The system menus and features adjust based on the privileges and type of user that is logged in. As an administrator, you will note that your menu of choices is much larger than a participant's menu, for example.

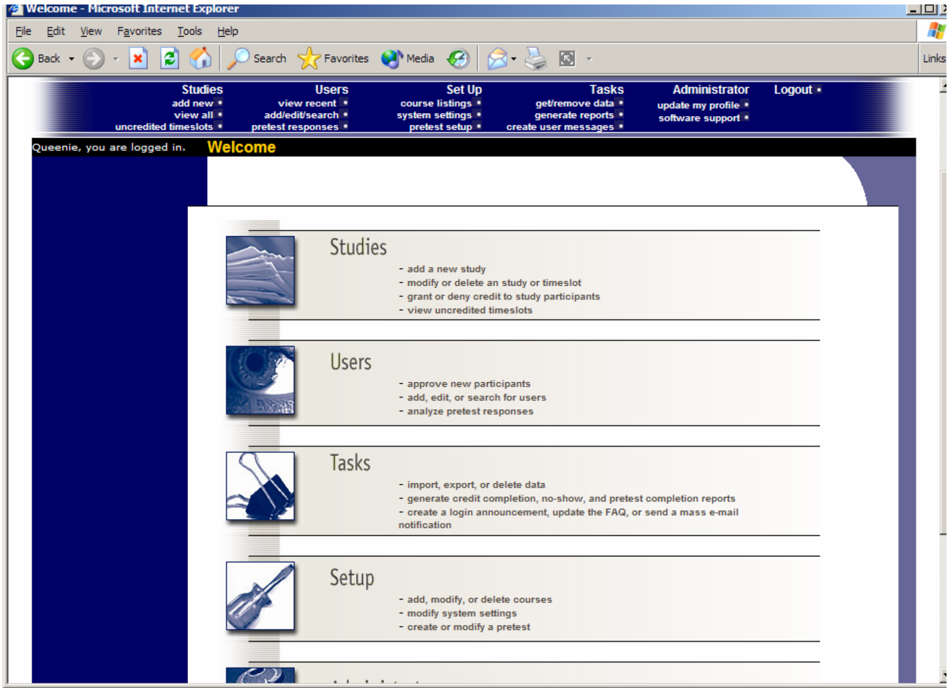


Figure 43 - Administrator Main Menu

After you log in, the first step is to secure your password. You may have been given a default password to login. Choose Update My Profile to change your password and other information. It is strongly recommended you change the password to a secure password you can easily remember, but is hard for others to guess. A secure password contains at least 8 characters, and is a combination of letters and numbers. Do not disclose this password to others, as Administrator accounts have full privileges throughout the system and thus are very powerful.

Typical Administrator Tasks

Each of the tasks listed below is documented in this manual. This list is intended to give you an idea of the tasks you might generally perform at various times during the term. See the appropriate section of this documentation for more information.

Start-of-Term Tasks

- Set up courses for the upcoming term, and make old courses non-Selectable, if necessary. See Course Maintenance.
- Set up locations (rooms) in the system, if location scheduling is enabled. See Location Maintenance.
- Import or add users into the system. This may not be necessary for participant accounts if you have Participant Account Self-Creation enabled (see Participant Account Self-Creation). You will need to add or import users of other types (researchers, instructors, principal investigators) if they do not already have accounts. See Importing Users, and Adding and Editing Users.
- Update the System Announcement with any new information, if necessary. See Updating the System Announcement.

- Set up an online pretest, if applicable (see Online Pretests).

Ongoing Tasks

- Approve users, if Participant Account Self-Creation is enabled and Automatic Account Approval is disabled. See Approving Accounts.
- Monitor studies, if necessary. This may include approving new or changed studies, and updating study timeslot usage quotas. See Monitoring Studies.

End-of-Term Tasks

- View reports on participant completion. See Generating Reports.
- Clear out and export data in preparation for the new term. See End-of-Semester Maintenance.

General User Notes

There are 5 types of users supported by the software: Administrator, Participant, Instructor, Researcher, and Principal Investigator (when enabled). All users must login to use the system, and privileges and features vary based on the user type.

User IDs

While all accounts and user types are treated separately, it is important to note that the user ID must be unique across all types of users. For example, if there is a participant with the user ID "jsmith", then there cannot be a researcher with the same user ID.

Usually, schools choose to use a school-wide user ID for the user ID, and this is often derived from the email address. For instance, if all users at Acme University have an email address of "username"@acme.edu, then that convention for user IDs is unique (there cannot be two users with the same username @acme.edu), and a good scheme to use. In this example, a user with the email address "jsmith@acme.edu" should use the user ID "jsmith" on the system.

The user ID and password combination is unique to this system, so users can choose to use the same password they use on other systems (like their email system) or a different password. The system can also automatically generate a random, secure password for users, which they can change if desired.

If you do not have a common domain (@ suffix), which usually occurs when inviting members from the community at large to participate in your research, you may leave the "@ Suffix" setting (see System Settings) blank. In that case, users can choose any user ID, but they will also be required to provide an email address so the system may contact them when necessary.

Duplicate User IDs

There may be a case where you try to add a user whose user ID is already taken. Most likely, this situation occurs when a person has more than one role in the system, such as a person who is both an Researcher and an Administrator.

Because the system does not allow for duplicate user IDs, the simple solution is to create 2 accounts with slightly different user IDs. If the user's researcher account is "jsmith", for example, then you could create a separate administrator account for that user with the ID "jsmith_administrator", assuming "jsmith_administrator" isn't an otherwise legitimate (and taken) user ID. If you go this route, be sure to add an alternate email address for the account with the "illegitimate" user ID, or automatically-generated emails to this user (from the system) will have delivery problems. See the section on Emails and User IDs for more information.

If you have provided an empty "@ Suffix" (see System Settings), then you can use any user ID that is not unique. In this situation, the system will prevent two participants requesting accounts from providing the same email address. In the case of an administrator who is creating accounts, it will merely a warning, but will allow it. There is usually a good reason more than one account has the same email address, usually when the same person has two accounts because they perform 2 different roles.

Emails and User IDs

If the "@ Suffix" is provided (see System Settings), which it is in most systems, then the user ID is typically derived from the user's university email address. The user ID is also used when email needs to be sent from the system to the user. Typical emails that are sent include credit notification and study sign-up confirmation emails (when enabled).

When sending an email, the system will first see if the user has provided an alternate email address. If this exists, it will be used. The user can add or modify their alternate email address from the "Update My Profile" link on the Main Menu after login. It can also be provided when an administrator creates the account through a data import or the Add User form.

If an alternate email address is not on file, the system will send an email to the address created by taking the user's user ID and appending @ and the "@ suffix" to the end of it. As an example, for the user ID "jsmith" and an @ suffix of "acme.edu", the email would be sent to "jsmith@acme.edu". The @ suffix is specified in System Settings.

If the "@ Suffix" is blank (see System Settings), then the system will always send to the email address provided by the user (in this situation, it is listed simply as the "Email Address" and not "Alternate Email Address", since it is mandatory when configured this way).

The alternate email address feature may be disabled for participants, with the "Enable Alt. Email" system setting (see System Settings).

Participant Unique ID Codes

If enabled (see System Settings), participants may be identified to researchers only by a unique, numeric ID code, or by only their first name. One of these options is generally desirable when protecting a participant's privacy is very important.

The system will automatically generate a numeric ID code for each participant, and they will be reminded of this ID code in any email communication generated from the system to participants (e.g. study reminder emails). Their ID code is also listed on their profile page for easy reference. Participants continue to login with their normal username, not their ID code.

Researchers only see a participant's ID code, and not their name or email address. Instructors see only the participant's names (not ID codes), as this information is necessary to link the participant to their course for proper crediting.

Administrators have access to both a participant's ID code and name, as this information is necessary when performing routine maintenance tasks. Because of this, the administrator should be careful when handling this sensitive information.

You should consult with your IRB about this feature. Many regulations governing human subject research require that Unique ID codes are used.

If you do not require this high level of privacy, it may be acceptable to choose the option where participants are identified to researchers by only their first name. This makes it easier to take attendance, while still offering some level of privacy.

Importing Users

The system features a method for bulk importing a set of user accounts, known as the User Import Wizard. You may use this feature to import Participant, Researcher, Instructor, or Principal Investigator (when enabled) accounts. Administrator accounts cannot be imported through the Import Wizard. See Adding and Editing Users for information on adding Administrator accounts.

The methods for adding users into the system are not mutually exclusive. For instance, you can add a set of participants through the Import Wizard, while still enabling the Participant Account Self-Creation feature. The system will automatically prevent duplicate user entries by verifying that a user ID is not taken when an attempt to create the account is made.

Preparation Tasks

The Import Wizard is a multi-step process. You should run only one import at a time, and you should have your data file ready when you start the import. The system will expire your login session after a period of inactivity (the exact period is listed on the first page of the Import Wizard), so it is important to move through the process with this timeout period in mind. In addition, the system may take a few moments to process your import file, so please be patient as you go through the steps.

The Import Wizard expects you to have a text file in comma-separated (CSV) format. Most institutions receive course rosters from the registrar or SIS as an Excel spreadsheet. Once you receive the data in this format, you should clean up or make changes to the data directly in the spreadsheet, as it is the easiest method for data cleanup. Once you have prepared the data, choose the Save As.. feature in Excel to save the file as a comma-separated file. The Import Wizard generally expects each data item to be surrounded by "quotes" and each item to be separated by a comma. If you use a program like Excel to generate the CSV file, all fields may not necessarily be surrounded by quotes. This may be acceptable – go through the import process and the system will notify you if there was a problem with the format.

Only one user record should appear on each line. The fields may appear in any order as long as it is consistent throughout the file. Step 2 of the Import Wizard allows you to list which fields are contained in your import file.

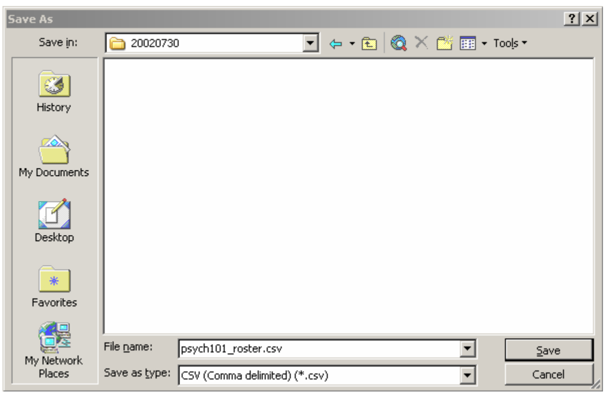


Figure 44 - Excel CSV Save As Feature

Performing the Import

Start the user import by choosing Get/Remove Data then Data Import, while logged in as an Administrator. If there was an existing import from before that was never fully completed, you will be given the opportunity to delete the import in progress or resume it.

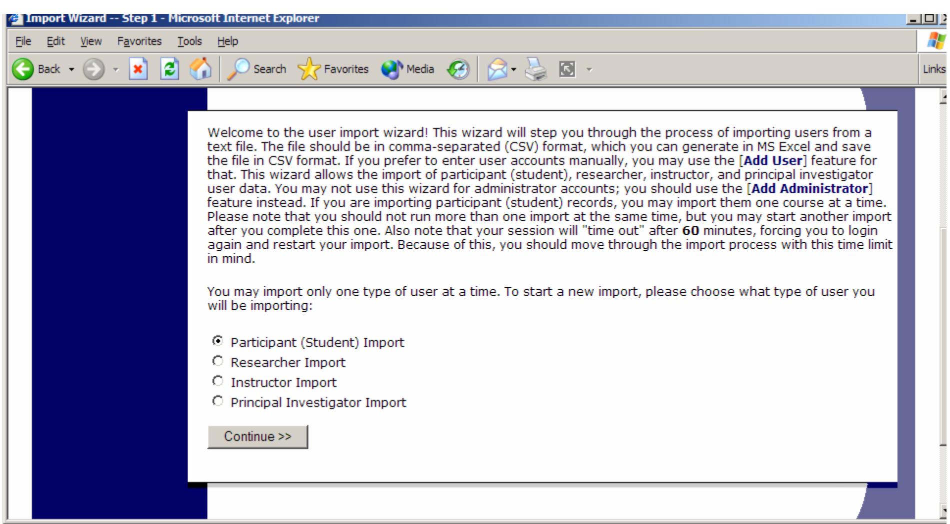


Figure 45 - Import Wizard Step 1

When you start a new import, you must first choose what type of users you would like to import. If you are importing participants, you must also choose what course the participants are in. The system will usually remember the settings you chose for the last import (fields, field ordering), so the process is likely to go very quickly if you are doing multiple imports.

Listed below is a table of the fields and which user types they apply to, as well as any restrictions about the fields.

Field Name	**Applies To**	**Comments**
First Name	All Users	Required. Maximum length: 50 characters.
Last Name	All Users	Required. Maximum length: 50 characters.
User ID	All Users	Required. Must be unique in the system. Maximum length: 30 characters. Do not include the @ suffix (e.g. "@yourschool.edu").
Password	All Users	Optional. Maximum length: 20 characters. If this is not included, the system will generate a random password for each user.
University ID Number	All Users	Optional. Maximum length: 20 characters. This option will not appear if importing participants and the Student ID Deactivation setting is on (see System Settings).
Phone Number	All Users	Optional. Maximum length: 12 characters.
Alternate Email Address	All Users	Optional if "@ Suffix" is provided, Required if "@ Suffix" is empty (see System Settings). Maximum length: 100 characters.
Pretest Completed?	Participants	Optional. Use the value "1" if the participant has completed the pretest, and "0" if not. This may not appear as an option depending on your System Settings, as it only applies to off-line pretests.
Course	Participants	This is selected during the import, and should not be included in your import file.
Office Location	Researchers, PIs, Instructors	Optional. Maximum length: 50 characters.

In Step 2 of the Import Wizard, you will be asked to choose which fields you will be importing. Only the required fields *must* be provided in your import file.

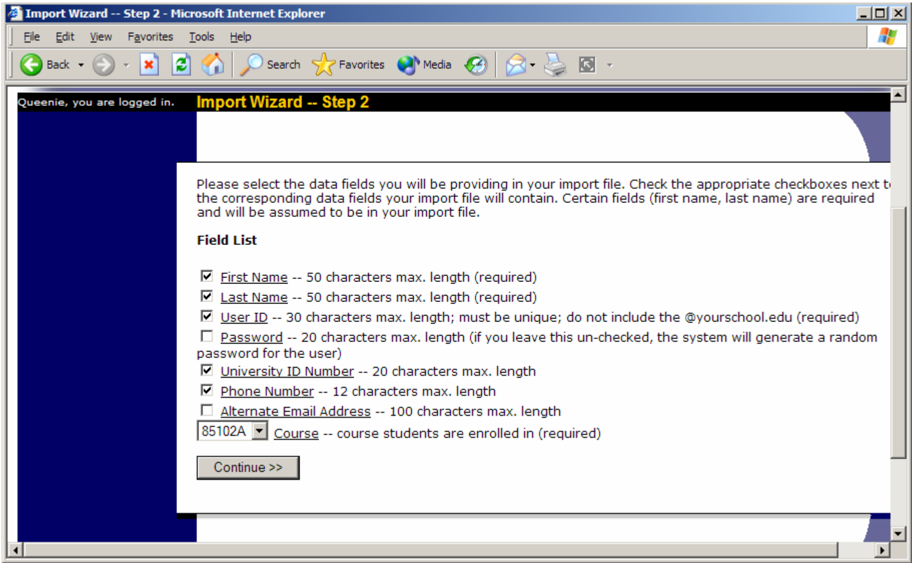


Figure 46 - Import Wizard Step 2

Once you select the fields you will be providing in your import file, you should choose the order as they are listed (left-to-right) in your import file. On this Step 3 page, you should type in the number next to each field corresponding to the order in the file (1 for the first field, 2 for the second field, and so on). It is *very important* that you use every number once and only once. Duplication of numbers may cause unexpected problems during the import.

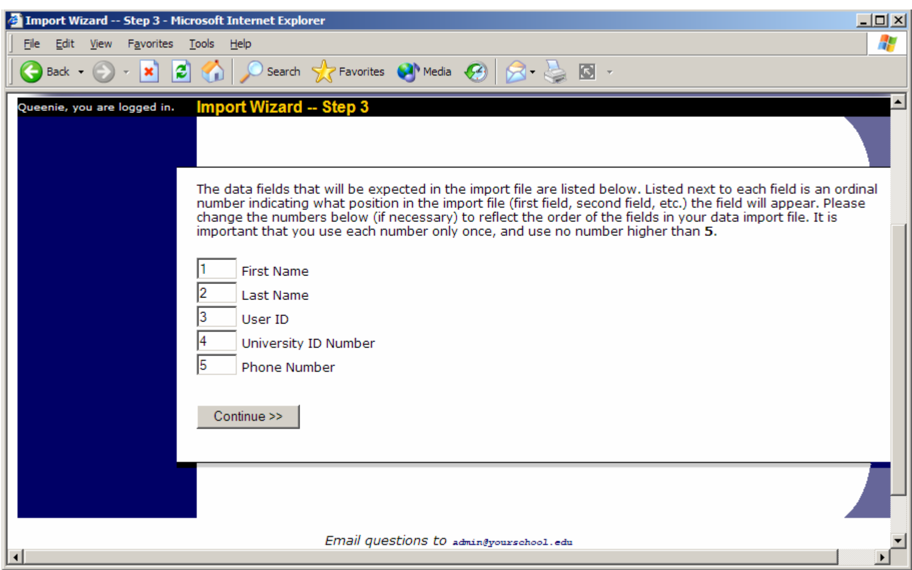


Figure 47 - Import Wizard Step 3

After choosing the order for the fields, you will proceed to Step 4 of the import process, where you paste in the contents of your import file. The easiest way to do this is to open up the file in a text editor like Notepad (Notepad is a program on Windows computers, and is found in the Start | Programs | Accessories menu). Make sure to turn off the Word Wrap feature on Notepad after opening the file with Notepad. Copy the appropriate lines of the file and paste them into the provided area in the Import Wizard. Do not include any header lines which describe the field names – just the data is necessary.

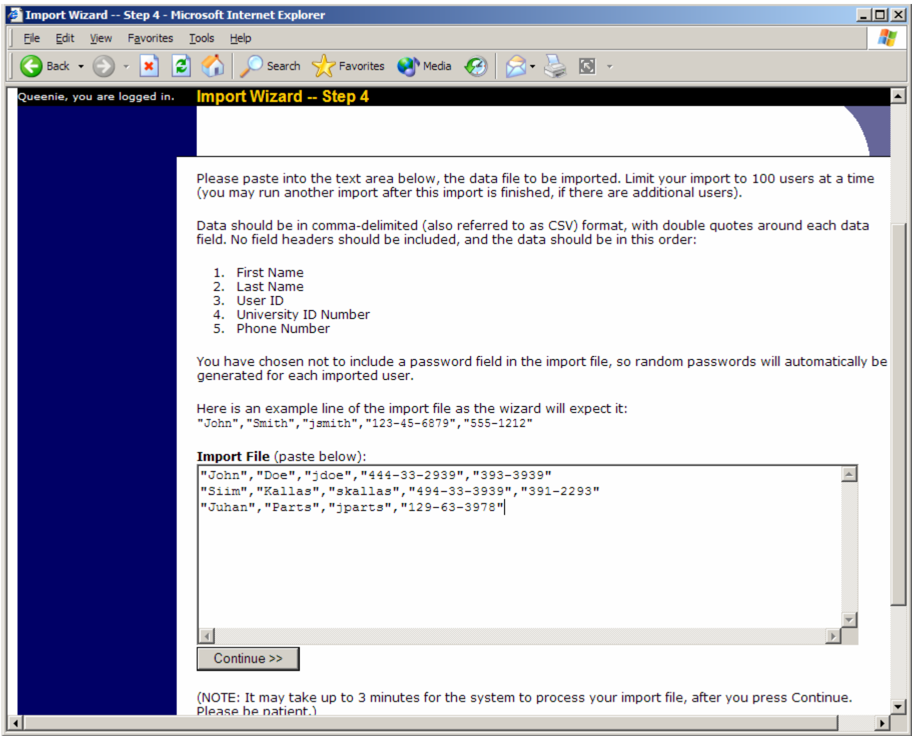


Figure 48 - Import Wizard Step 4

After you paste in the appropriate information, click Continue to proceed. Note it may take a few moments to process the import file. The Import Wizard is busy processing your import and checking for any errors in the data.

You will see a resulting page (Step 5) that lists the data as the system was able to read it. Any records with problems will be highlighted in yellow, and the problem(s) will be identified. At this point, you can choose to re-paste the import, proceed, or cancel.

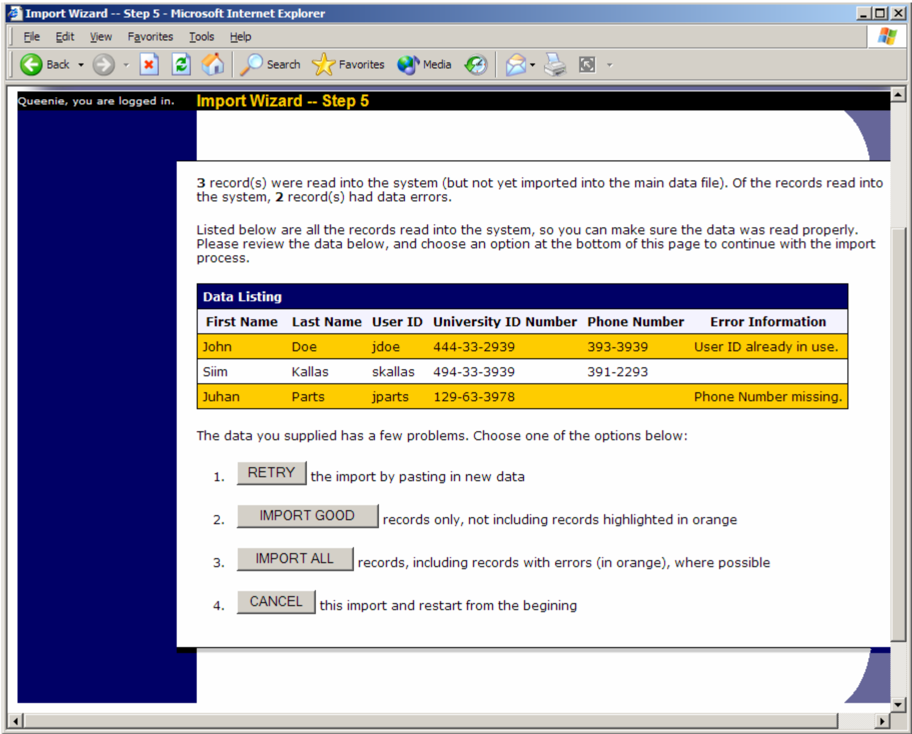


Figure 49 - Import Wizard Step 5

If you choose to proceed, you have two options depending on whether your import file had errors. If your import file had no errors, you can simply proceed. If your import file had errors, you can elect to have the system import only the records that were completely acceptable (those not highlighted in yellow). Or, the system can import the acceptable records, and attempt to fix the unacceptable records and import them as well. Generally, the system can fix all problems except when key required missing fields are missing, mainly the name or User ID. All other problems can generally be fixed.

There is a special case to be aware of: if you are importing a participant that is already in the system (this is checked by matching their user ID) because they are in a different course, and you choose the Import All option, then the participant will simply have the new course (the course you are currently doing the import for) added to their existing record, and their credit requirements adjusted accordingly. This makes it easier to run imports when participants can be a member of multiple courses.

Regardless of how you proceed, you will then receive a status report on your import, indicating how many records were imported. *You must continue to properly finish the import*. At this point, you may choose whether to email the newly-imported users with their login information. Regardless of your choice to email them or not, is it *very important* to proceed to the next and final step of the import, as that will properly complete the import and clear out any remnant data from the import process itself.

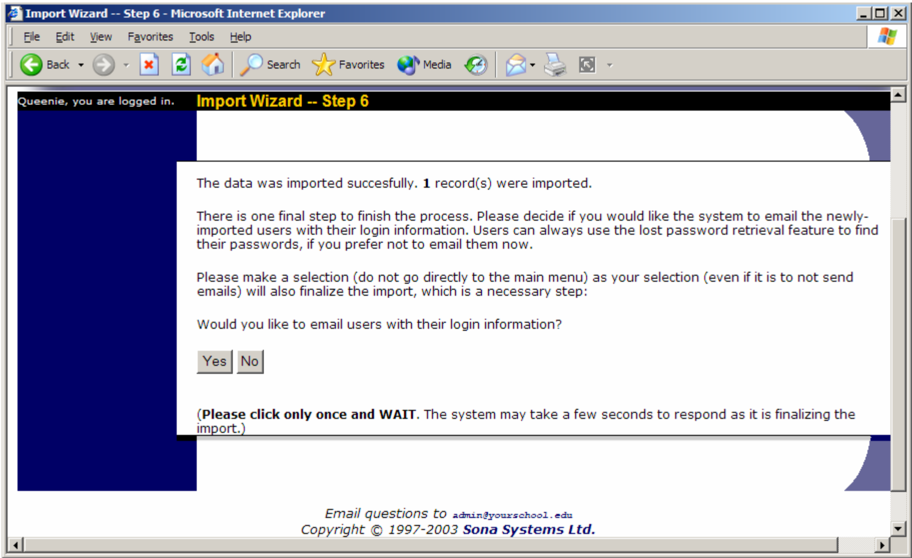


Figure 50 - Import Wizard Step 6

If you imported a large number of users and chose to email users with their login information, the system will send the email in groups. You will be notified of the progress on-screen. If you prefer not to email users with their login information at this point, they can retrieve it themselves with the lost password feature on the front page of the site, if you have enabled this feature (see System Settings).

Once you have finished, you are taken back to the Main Menu, where you may start another import if you wish.

Adding and Editing Users

Overview

Besides using the user import feature or participant account self-creation (when enabled), you may also manually add and edit users, on a per-user basis. If you are editing a participant record, this part of the system also provides the facility for manual credit granting, and the ability to monitor a participant's progress. It should be noted that this user add and edit feature is also the only facility for adding administrator accounts.

This facility also provides the ability to add administrative comments about any user. This is where you may keep special notes about a user, and these notes are not visible to anyone except an administrator.

Finding Users

Choose the Add/Edit/Search option from Users toolbar section to get started. You will see a search tool at the top, and some other quick search features, as well as a partial list of users.

To quickly view a list of all users of a certain user type (with the exception of participants), click the View All Researchers (or other desired user type) link.

To view a subset of users, use the search tool at the top of the page. Select the type of user you would like to search for, then choose a letter corresponding to the first letter of their last name (for instance, choose "S" to find a user with the last name Smith).

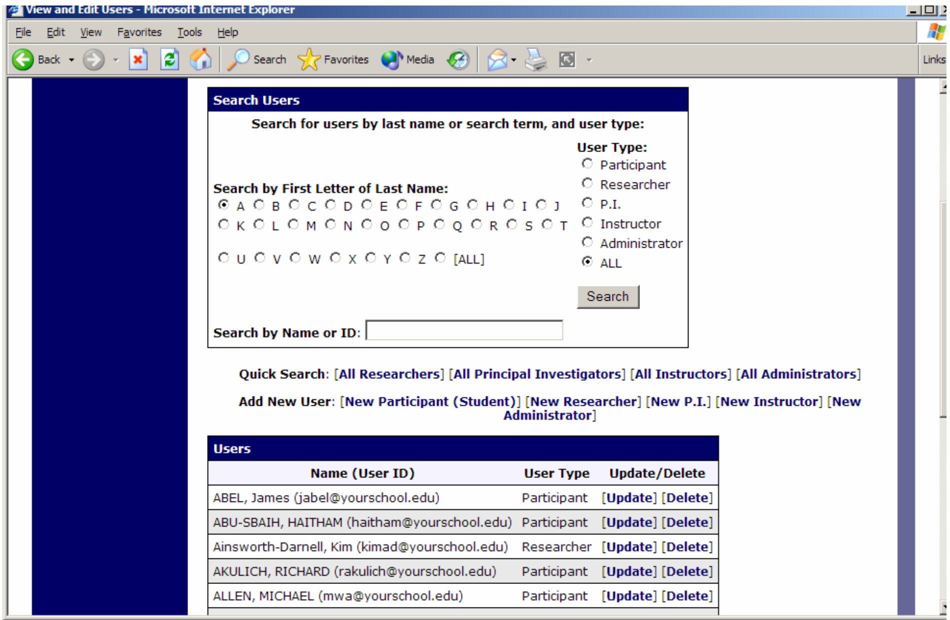


Figure 51 - View and Edit Users Search Tool

If you are looking for an exact user and you know their name, user ID (or email address, if the "@ Suffix" setting is blank – see System Settings) or university ID number, you can type that into the search box instead of using the letter choice.

Editing Users

Once you find the user you would like to edit, choose the Update option. You can view all information about the user. If it is a participant, you will also see a list of their study sign-ups and progress, and have the opportunity to grant them a non-study credit. You can also change course assignments for participants here. Finally, you can adjust a participant's credit requirements if necessary. For instance, you may need to manually increase the number of credits required of the participant. If you have Multiple Course Support enabled (see System Settings), and you change a participant's course assignments, you may need to manually adjust their credit requirements, as they are not recomputed if the course assignments are changed. To make this easier, the course requirements for each course are listed next to the course name. If the system is configured such that participants may assign their credits to a specific course, then you will have the option to transfer their credits from their old course to one of their new courses, if you are changing which courses the participant is a member of.

In some cases, you may want the participant to self-select which courses they belong to again. To do this, set their course to "NONE", and the participant will be prompted to select their course(s) upon their next login. Note that setting their courses to NONE will also reset their credits needed value to 0, and it will then be recomputed after they select their courses.

If Online Pretesting is enabled, and the participant has completed the pretest, you will have an opportunity to delete their pretest responses. Typically, this is only done if the participant for some reason wants to take the pretest again. Deleting the pretest will also delete any credit the participant received for completing the pretest.

You may or may not see the user's current password, depending on the Administrator Password Retrieval setting (see System Settings). If you cannot see the user's current password, then you may only change it by typing in a new password. If the field is left blank while updating the user's record, no change will be made to the user's password if Password Retrieval is turned off.

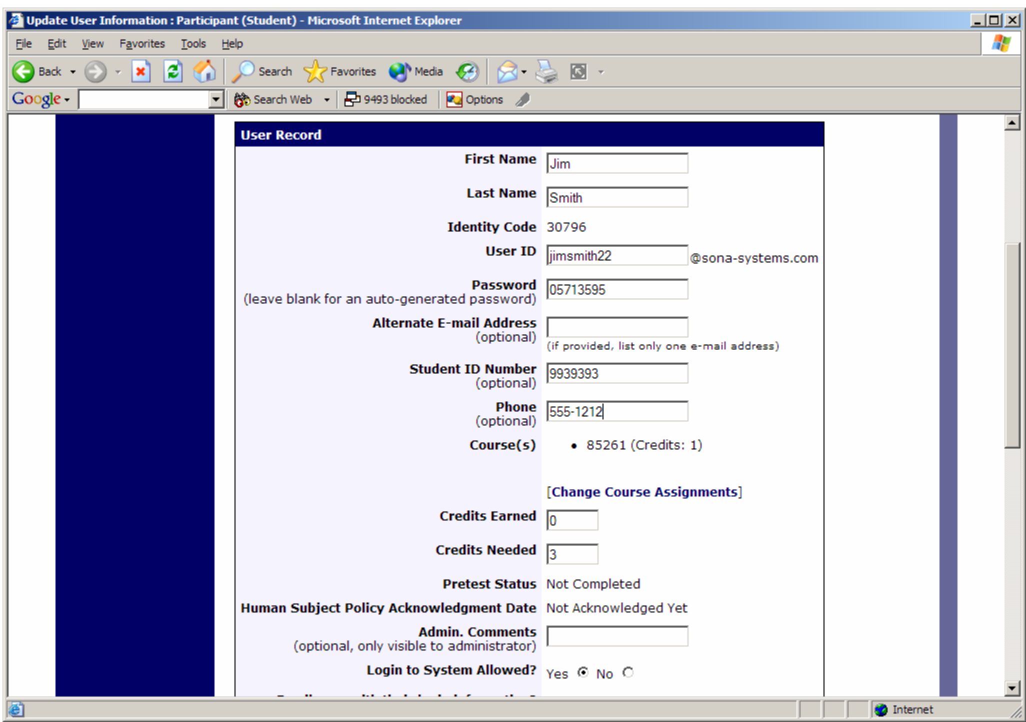


Figure 52- Updating a Participant Record

If you would like to email the user with their login information, choose the Email user with their login information choice, and an email will be sent to them with their login information as soon as the record is saved.

Adding Users

To add a user, choose the Add and Edit Users option from the Main Menu. You will see a set of links to add a new user for each of the user types supported by the system. Choose the type of user you would like to add (for example, "New Researcher").

You will see a number of fields that vary depending on what type of user you are adding. Fields marked with a (+) are optional and may be left blank. Users can update many of the fields on their own, so you may choose to enter in only minimal data, and allow users to fill out the rest after they login.

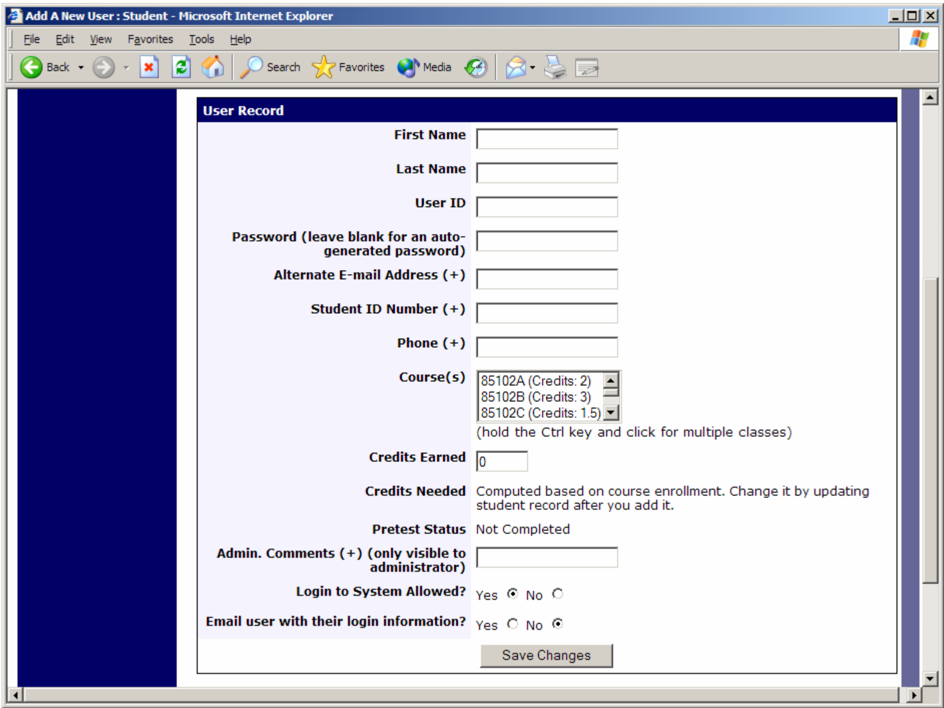


Figure 53 - Adding a New Participant

All users must have a password. If you would like the system to generate a random password for the user, simply leave the password field blank and a random password will be generated once the record is saved.

If you are adding a participant, you must specify at least one course which the participant is a member of. If your system is configured to allow participants to belong to multiple courses (see System Settings), then you may indicate more than one course a participant belongs to, where applicable. To select multiple courses, hold down the Ctrl key while clicking on the desired courses. If this is a new system and you have not added any courses, you should do so first in the Course Maintenance section. If you choose “NONE” as their course selection, the participant will be prompted to select their courses upon their next login.

The alternate email address field is used to specify an alternate email delivery address for the user. If an email address is provided here, then emails to the user from the system (credit notifications, sign-up notifications, etc.) will be sent to the alternate email address. If this field is empty, an email will be sent to the address formed by adding the system-wide @ suffix (see System Settings) to the end of the user’s User ID. If the user’s User ID is “jsmith” and the @ suffix is “yourschool.edu”, then the email would be sent to jsmith@yourschool.edu. You may provide only one alternate email address in this field. The alternate email address may be disabled for participants. See Emails and User IDs for more information.

If the “@ Suffix” (see System Settings) is blank, then the alternate email address (which is then labeled “Email Address”) is mandatory. All emails for the user will go to this address. If you add a user and the email address is also used by another account on the system, you will be warned, but the system will allow it. This situation usually occurs when the same person has 2 user accounts, because they play multiple roles in the system.

The Admin. Comments field allows you to type in any special notes about the user. This field is only visible to the administrator.

When you are done entering information, click Save Changes and the user will be added. If you chose “Yes” for the “Email User with their Login Information” option, then they will be sent an email with their login information.

Deleting Users

The deletion of a user should be done very carefully and with great forethought. Deleting a user deletes all data associated with them. The effect of deleting the associated data can be quite disastrous. For instance, if you delete a researcher who owned 2 studies with many sign-ups, the researcher’s studies, as well as all sign-up data, is also deleted.

The system will provide a warning and some detailed information about the effects of deleting the selected user. There are few cases when you will need to delete an individual user, so use this feature carefully. If you are worried about causing problems but want to prevent the user from using the system, you can instead update their record and set the “Login to System Allowed” value to No (see Editing Users).

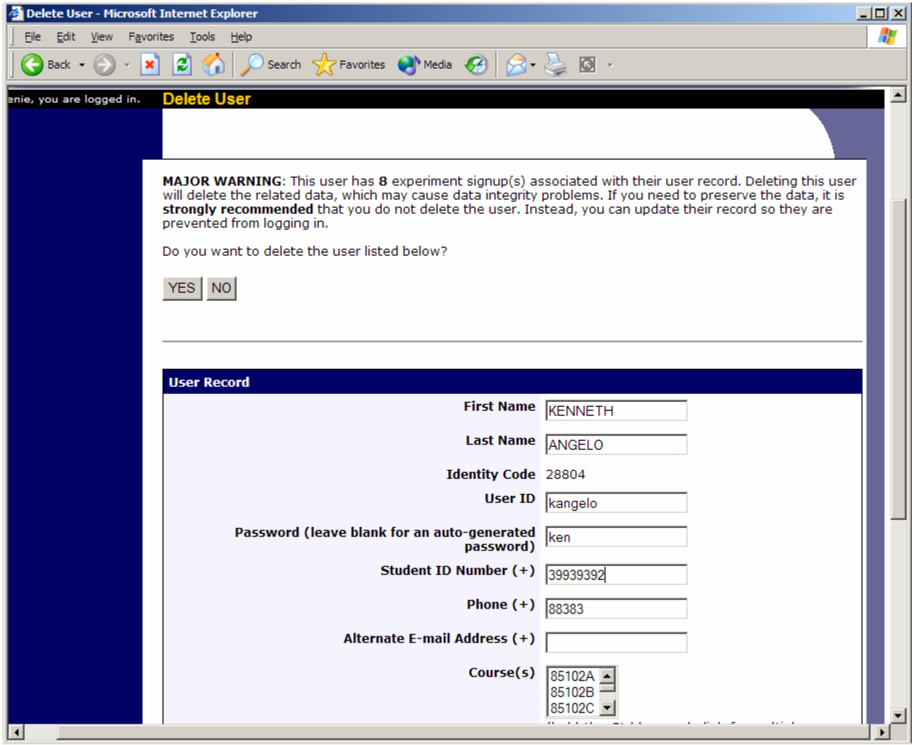


Figure 54 - Deleting A User

If you still find it necessary to delete a user, locate them from the Add and Edit Users menu, and choose the Delete option. You will see a confirmation screen noting the effects of your deletion (if any), and you can choose Yes to proceed with the deletion.

You cannot delete yourself, but you can delete other administrator accounts.

If you want to delete a bulk of users, most likely it is the end of the semester and you are looking to clear out old data. In this case, see the End-of-Semester Maintenance section, which provides a bulk deletion facility.

If you would like to deactivate (but not deleted) a set of user accounts, you can use the Batch User Operations feature. A user who is deactivated cannot login to the system, but all their data is retained.

Participants with Excessive No-Shows

Many organizations choose to revoke login privileges to the system (see Removing a User's Access to the System) from participants who have many no-shows. To make such a process easier, the system can automatically email the administrator when the participant meets or exceeds a certain number of no-shows. This is configured in System Settings (see Administrator No-Show Notification Email). After receiving such an email, you should logon to the system and verify the participant is in fact worthy of an account deactivation. In rare cases, the researcher may have later changed the no-show to a credit grant. If you would not like to use this feature, simply set the value to 0 and notifications to the administrator about a participant's no-show level will never be sent.

Removing a User's Access to the System

If you would simply like to prevent a user from logging in, but still preserve their data, the easiest way to do this is to update their record and set the "Login to System Allowed" value to No. You can re-enable their login at a later date if desired. See Editing Users for more information.

New Participant Account Message

For participants (and only participants), it is possible to specify additional information that is included in the email sent to a participant with their login information, when their account is created. Such an email is sent when the participant creates their own account, or when their account is created by the administrator, either using the bulk import feature or when an individual account is created. Typically, such account text may contain special instructions or a pointer to additional information.

To set up such text, login as an administrator and go to Create User Message then Update System Text, and enter text in the appropriate section. If you would like to clear out any existing text there, simply delete it and save the changes. The changes will take effect immediately.

Principal Investigator (P.I.) Accounts

If the Principal Investigator option is enabled (see System Settings), then the system will support P.I. accounts. P.I. accounts have the full privileges of a researcher, for studies in which the user is listed as the P.I. The reason for P.I. accounts is in situations where the researcher runs the study on behalf of a P.I., but the P.I. would like to occasionally login and monitor the study's progress.

It should be noted that if you enable the P.I. option, every study *must* have a P.I. If you have a situation where only a few studies have P.I.s, create a dummy P.I. account so researchers can select that dummy P.I. as the P.I. of studies that don't otherwise have a P.I.

Principal Investigator Timeslot Usage Limit

If the Timeslot Usage Restriction (see System Settings) is enabled and set to enforce on a per-P.I. basis, then principal investigators are limited in the amount of time they may use for scheduling timeslots. The default limit (in hours) is based on the Timeslot Usage Restriction Default (see System Settings), but this may be changed on a per-P.I. basis by editing the their record. Their current usage is listed when you update their record. You may also generate reports on P.I. time usage (see Generating Reports).

Since researchers for a study have the same level of control as the principal investigator does, then researchers can view the usage for a study based on the principal investigator, and are forced to adhere to that limit.

The timeslot usage is computed by adding up all timeslots in the past where credit was granted, then adding in the value of all future timeslots (regardless of credit status). Thus, it is possible for a P.I.'s usage to go *down* as time progresses, if their future timeslots are not used (i.e. participants do not sign up for them). Principal investigators and their researchers are reminded of their timeslot usage every time they go to add a timeslot.

Researcher Accounts

Researchers may choose to receive a daily reminder of the sessions they have scheduled for the following day. Researchers can adjust this setting on their own. The default value is set based on the Researcher Reminder Email setting (see System Settings). This email is sent once a day (if there is a reminder to be sent), immediately after participants are sent a reminder of the following day's studies (if such an option is enabled). The email is also sent if the researcher has any timeslots more than 2 days old that have not been dealt with. Studies should still check into the system routinely, in case a participant signed up (or cancelled) for a study after the daily reminder email was sent.

Researcher Timeslot Usage Limit

If the Timeslot Usage Restriction (see System Settings) is enabled and set to enforce on a per-researcher basis, then researchers are limited in the amount of time they may use for scheduling timeslots. The default limit (in hours) is based on the Timeslot Usage Restriction Default (see System Settings), but this may be changed on a per-researcher basis by editing the researcher's record. Their current usage is listed when you update their record. You may also generate reports on researcher time usage (see Generating Reports).

The timeslot usage is computed by adding up all timeslots in the past where credit was granted, then adding in the value of all future timeslots (regardless of credit status). Thus, it is possible for a researcher's usage to go *down* as time progresses, if their future timeslots are not used (i.e. participants do not sign up for them). Researchers are reminded of their timeslot usage every time they go to add a timeslot.

Administrator Accounts

You may have more than one administrator account in the system. All administrators have the same level of high privileges. Be careful who has an administrator account, and be sure administrator accounts have an extremely secure password. A secure password contains at least 8 characters, and is a combination of letters and numbers.

Administrator accounts have full privileges to the system. Not only can the administrator accomplish administrator tasks (importing users, running reports, changing system-wide settings, etc.), but the administrator can also accomplish all the tasks of a researcher. The advantage of this added researcher privilege is that an administrator can act as a researcher for monitoring purposes or other reasons. This need might arise if a researcher is sick but there are participants who are waiting to receive credit from the researcher. The administrator can easily act on behalf of the absent researcher and perform the necessary tasks.

Also note that administrators should receive the proper training in handling sensitive data (to meet various regulatory requirements governing data), since they have access to all data in the system. See Regulatory Compliance for more information.

Participant Account Self-Creation

Overview

If the feature is enabled (see Participant Account Self-Creation in System Settings) to allow participants to create their own accounts, then this section applies.

Some schools choose to allow participants to sign up for their own accounts. If this feature is enabled, a link will appear on the front (login) page of the site to provide this facility.

This feature can exist as a supplement to importing users from a data file and manually adding them, or it can be the only method of adding participant accounts. None of the methods of adding users is mutually exclusive. Typically, a school may choose to use this self sign-up feature if a data import of the participant list is unavailable.

It should be noted that the self sign-up feature is only available for participant accounts, which likely make up the bulk of user accounts in the system. Other user types (instructors, administrators, researchers, etc.) of users may only be added through the user import wizard or add user forms. This is usually not a major problem, as researcher and instructor accounts do not change much from term to term.

When a participant goes to the account self-creation form, they must provide very basic information, including their name, user ID, and choose which course(s) they are enrolled in. If the Student ID Requirement is set to Yes (see System Settings) and Student ID Deactivation is set to No (see System Settings), then participants must also provide their Student/University ID number. If Automatic Account Approval (see System Settings) is set to Yes, then participants will be emailed their password as soon as they submit their account request. If this value is set to No, then the administrator must approve accounts before they may login.

If "@ Suffix" is provide (see System Settings), the key to authenticating a participant's validity is their user ID. A participant is notified of their password only after their account is approved by the administrator (or if it is automatically approved, based on the Automatic Account Approval system setting), and this approval email is sent to the email address derived from their user ID. Since only the "real" participant can check the email account for that user ID, it is a good method to ensure that the person applying for the account is who they claim to be. If a participant prefers to be contacted at an alternate email address, they can supply that only after their first login, by updating their profile (if alternate email addresses are enabled for participants – see System Settings).

If the participant supplies an invalid email address (usually just a simple typo), the email will bounce back to the administrator (the email address specified as Administrator Email in System Settings), so the administrator can take corrective action. To reduce the chances of this, participants are required to enter their email address twice for verification.

If the "@ Suffix" is left blank, the user may select any user ID, but they must provide a contact email address as well. In this case, the administrator will need to verify that the person is allowed to use the system before approving the account (if Automatic Account Approval is disabled).

In either situation for the Automatic Account Approval setting, if Administrator Account Notification Email (see System Settings) is set to Yes, then the administrator will be notified by email when an account is requested. This setting can be changed mid-term. Some organizations like to disable this at the start of the term, when they know many accounts are being requested and they just log on to the site every day to check. Then they enable it after the initial rush, as they may not be on the site as often, to monitor for new account requests.

The form will provide the opportunity for the participant to select which course(s) they belong to, assuming there is more than one course in the system (if there is only one course, there is no need to offer a selection). Participants can change this course assignment later, if Course Reassignment (see System Settings) is enabled and they have not yet earned any credits.

The may add additional text on the new account creation page to provide specific guidance to participants on creating accounts. This text is set in Create User Messages | Update System Text. See Updating System Text for more information.

When the participant is emailed their account information, any additional message the administrator has specified to be sent with new participant accounts will be included in the email. See Updating System Text for more information.

Automatic Account Approval

If Automatic Account Approval is set to Yes (see System Settings), participants are emailed their account information immediately after they request their account – with no administrator intervention required. As an administrator you may monitor such activities by viewing the recent users report (Users | View Recent) to see the last 20 new users. You may also enable Administrator Account Notification Email (see System Settings), to receive an email notification every time an account is requested.

Approving Accounts

On the User toolbar section, there is an option labeled Approve New (if Automatic Account Approval is set to No). Next to it will be listed the number of user accounts awaiting approval. If the offline pretest option is enabled, there is also an option to set the participant's pretest status at the same time. Read over the basic information the participant provided, and approve or delete the account. There is also a space to enter any comments (this is optional), and these comments will be included in the email to the participant with their login information. If the account is approved, an email will be sent to the participant notifying them of the approval, and include login information (their password) for the site, and their Unique ID code if the feature is enabled (see Participant Unique ID Codes). If the account is deleted, an email will *only* be sent if you included comments (usually the reason for account rejection). If you would like to receive an email notification every time a new account awaits your approval (this is particularly useful in the middle of the term, when you may not be checking the site as often), enable the Administrator Account Notification Email setting (see System Settings).

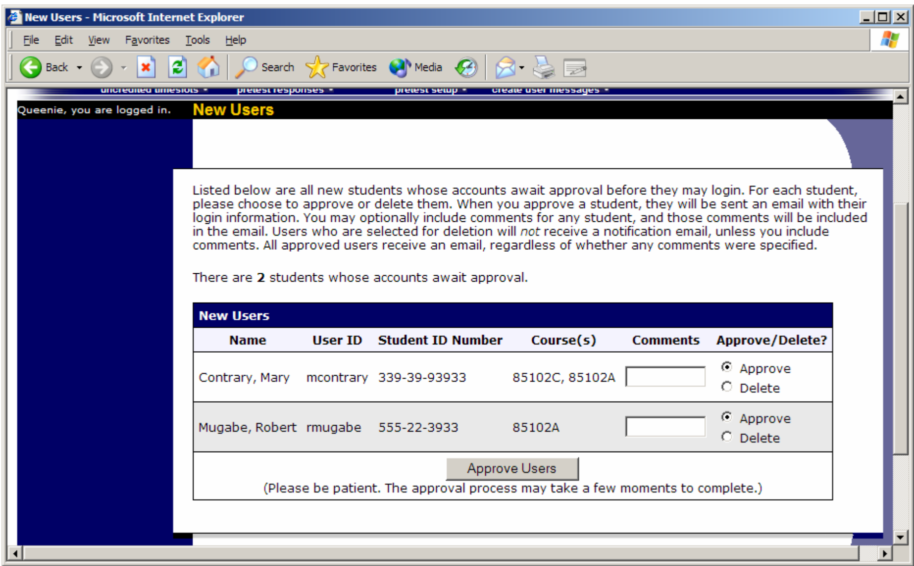


Figure 55- Approving New Users

Online Pretests

Introduction

The system includes a rather extensive online pretesting feature. It allows you to set up a system-wide pretest that participants must complete before they use the system. Researchers can restrict participation in studies based on pretest results, and they may also view an individual participant's pretest responses (if enabled, see System Settings). Finally, the researcher may analyze pretest responses in the aggregate (across all participants).

The online pretest feature is rather complex due to the many features it contains. In addition, your ability to modify the pretest after participants have started to take the pretest (or after researchers have placed study restrictions based on pretest responses) is quite limited. Because of this, you should plan out your pretest well in advance, to make sure it is finalized before you make it available to participants. Do not hesitate to contact Technical Support if you have any questions. Because the pretest is system-wide and may involve questions from a variety of researchers, many organizations choose to plan out the pretest on paper first (what questions and sections it will contain) before inputting it online in the system.

If you want to allow researchers to set up their own sections, the easiest way to do this is to have them set up their own (inactive) online survey, and you can then copy the appropriate sections from their online survey into the pretest, once it is ready. See Copying a Section in this documentation for more information.

A pretest may have an unlimited number of sections and an unlimited number of questions per section. Questions may be free-entry (requiring the participant to type in an answer) or multiple-choice (pick only one or pick many from the list of choices). You may also specify that the system computes a participant's results for an entire section, as either a section sum or average score. This computed sum or average can be computed only for numeric, multiple-choice (pick only one) questions in the section. It is useful in situations where you want to restrict participation based on the average of a participant's responses to a section, to account for one or two outlying responses that still fall within the adequate range when the participant's entire response set is considered. It is also useful when a participant's aggregate score is more important, such as with a depression battery.

Studies can be restricted so that only participants providing certain responses (or with certain section average/sum scores) may participate in the study. Participants are unaware that such restrictions are in place – the system will simply not show participants studies for which they are ineligible due to pretest restrictions. Studies can only be restricted based on multiple-choice (numeric or non-numeric) questions that allow for only one choice to be selected. A study can be restricted by one question or a set of questions, and to any response or set of responses for each question.

Researchers are provided with a facility to analyze any pretest question response in aggregate (across all participants), to help them in placing their study restrictions (if Pretest Aggregate Viewing is enabled, see System Settings). For instance, a researcher may want to choose the top 25% of participants, but is unsure what responses constitute the top 25% until the responses are analyzed. If enabled, researchers can also view all of an individual participant's responses to a pretest, if that participant has signed up for the researcher's study. They may also contact a group of participants who meet their specified criteria, presumable to invite them to participate in one of their studies. The contact feature is only enabled for researchers if the Pretest Contact and Pretest Aggregate Viewing (see System Settings) are enabled. You should consult with your IRB before enabling this setting, as some IRBs are concerned that contacting participants and inviting them to participate in a specific study may be coercive. There is also a setting so the administrator can automatically receive an email copy of any communication sent to participants via this contact method (see Pretest Contact Admin CC. in System Settings).

Sections can be displayed in a specified order or random order, or a combination of both. Every section may contain introductory text introducing the section, and the pretest itself may also have introductory text introducing the pretest. You may specify that questions within a section are displayed in random order. Multiple choice questions can have their choices displayed in the entered order or random order (this is specified on a per-question basis). Multiple choice question choices can be displayed horizontally (across the page) or vertically (down the page).

For information specifically on restricting study participation based on pretest results or analyzing and viewing pretest responses, please see the Researcher documentation.

Note that there is a bug in Internet Explorer 5 on the Macintosh platform that may result in a slow response for participants when they are using this specific web browser and completing pretest sections with many choices. Microsoft has discontinued support for Internet Explorer on the Mac, and most likely will not fix this bug. The other browsers on the Mac (Firefox, Mozilla) all work perfectly, and there are no problems for Windows users with any browser. The specific problem occurs only rarely, but can occur.

Privacy Protections

You may configure the pretest so a participant may opt out of it. You may also configure each question (on a per-question basis) so that participants may opt out of answering the question. If anonymous identification is enabled (see Participant Identification in System Settings), participants are only identified to researchers with a unique numeric ID code.

Pretest Participation Credits

When you set up the pretest, you may specify the number of credits a participant will earn for completing the pretest, and also the number of credits they earn for declining to participate in the pretest (if they are allowed to opt-out). If participants are allowed to assign credits to a specific course (see Course Credit Assignment in System Settings), they are also prompted to choose which course they would like to assign their credit to, before they may finish the pretest.

If you would not like to allow participants to earn credit, simple set the value(s) to 0 when you set up the pretest.

It is not required that participants earn credit for pretest participation. Keep in mind the pretest is presented to a participant the first time the log on, before they can see studies. Thus you can safely assume that all participants have dealt with the pretest by the time they really start to use the system. Working on this assumption, many organizations choose just to lower the default credit requirements for all users by the amount they would ordinarily grant for pretest participation.

Creating or Modifying a Pretest

To work with a pretest, login as an administrator and click on Pretest Setup on the top menu bar. If there is an existing pretest in the system, you will be given the opportunity to modify it or delete it and create a new pretest. For more information about deleting a pretest, see Deleting a Pretest.

It is important to note that while you are making changes to a pretest, it is deactivated so participants may not take the pretest. When you go to the Finalize Pretest option after you have finished your work with the pretest, you will have the opportunity to save your changes and make the pretest active (available to participants) or inactive (not available to participants). If a participant who has not completed the pretest logs in and the pretest is inactive, they can still use the system as a normal user. On their next login when the pretest *is* active, they will be taken to the pretest. You should always choose the Finalize Pretest option when you finish your work with the pretest, as the system saves all changes and computes some other important data when you finalize the pretest. If you would like to continue work on the pretest at a later date, you should still choose the Finalize Pretest option to ensure your changes during the current session are properly saved (most likely you would choose to keep the pretest inactive in this situation).

General Pretest Information

Choose the General Information option (if creating a new pretest, this is the first page you will see) to provide some basic information about the pretest. The fields are explained below:

Field	**Description**
Introductory Text	Optional. Provide a set of text that will be displayed when a participant starts the pretest. If you allow participants to opt out of the pretest, this text will be displayed on the page that allows them to opt out, so you might want to include any information about why a participant may or may not want to opt out. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).
Closing Text	Optional. Provide a set of text that will be displayed after the participant has finished the pretest and saved all their responses. This is a great place to include any relevant debriefing information.You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).
Display sections in random order?	You may specify a specific ordering for sections, have the system randomize the order for all sections, or specify the order of some sections, and a random order for other sections. If you specify the order for only some sections, you may also specify, for each section, whether it should be displayed before or after the random-

	ordered sections.
Can participants choose to opt-out of the pretest?	If set to Yes, participants may opt out of participating in the pretest. They may take it at a later time (through a link on their My Profile page).
How many credits should a participant receive for completing the pretest?	Enter a number indicating how many credits the participant will receive for completion of the pretest. If they should not earn credits for completing the pretest, enter the value “0”. Fractional credit values (e.g. 0.5, 1.5, etc.) are allowed.
How many credits should a participant receive if they choose to opt-out of the pretest?	Enter a number indicating how many credits the participant will receive for declining to participate in the pretest. If they should not earn credits for declining to participate in the pretest, enter the value “0”. Fractional credit values (e.g. 0.5, 1.5, etc.) are allowed. This value only applies if participants are allowed to opt-out of the pretest.

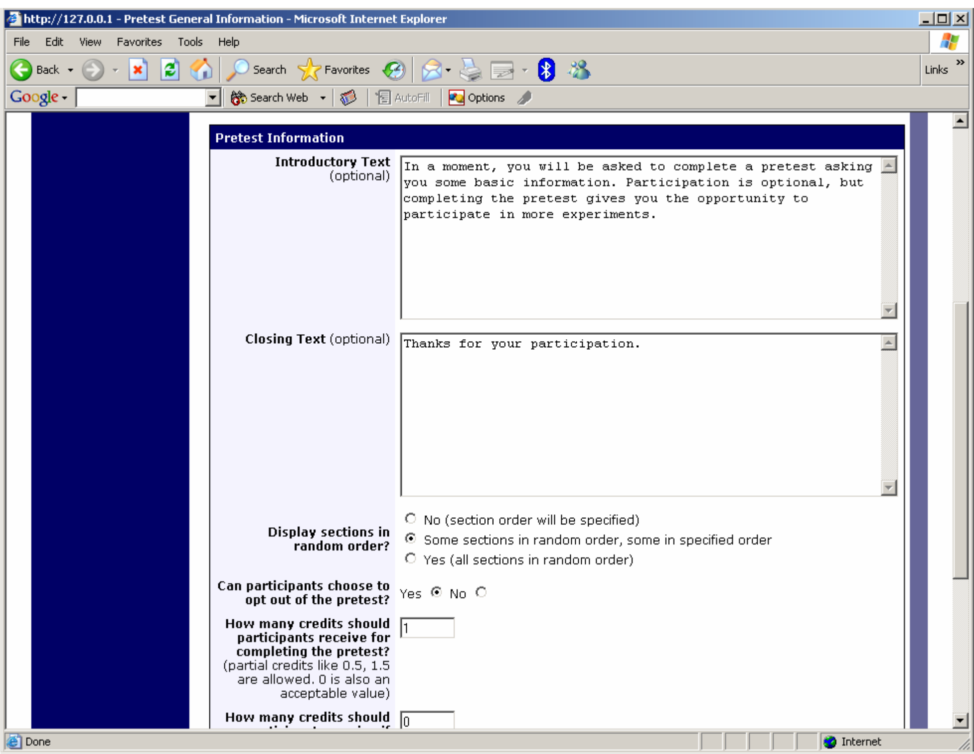


Figure 56 - Pretest General Information

Section List

Depending on if you are adding or editing the pretest, you will be taken to the list of sections for the pretest. Here, you can change the order that sections will be displayed (if you have not enabled full random section ordering for the pretest), and see a quick review of each question. From here, you can add a question to any section and edit any question. To add a new section, choose the Add a New Section choice at the bottom of the page.

If you have enabled partial random section ordering, then you can specify a section order for the sections you would like to be displayed in a specified order. For the sections you would like to be displayed in random order, leave the Section Order area blank. When you specify a section order, use each number once, and use the numbers 1-98 if you would like the section to be displayed *before* the random-ordered sections, and the numbers 100-199 if you would like the section to be displayed *after* the random-ordered sections. Be sure to use each number only once, or leave the number blank to make the section part of the random-ordered section. Sometimes it is useful to use partial random ordering if you want to ask basic (e.g. demographic) information in the first few sections, while asking more analytical questions in the random-ordered sections. Likewise, you may want to ask about the previous random-ordered sections after they are completed.

There is also a Preview Section option so you may preview the pretest as participants will see it.

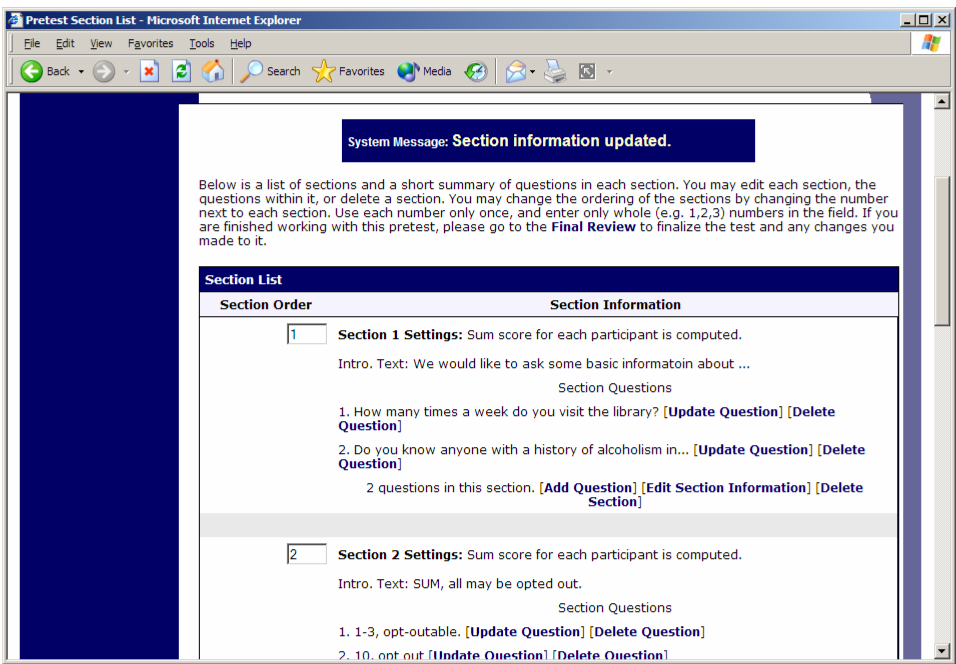


Figure 57 - Pretest Section List

Adding or Modifying a Section

To add a new section, choose the Add New Section link at the bottom of the Section List page. To modify an existing section, choose the Edit Section Information link next to the section you would like to modify, from the Section List page.

There are three pieces of information you may provide for each section. First, you may specify some introductory text to be displayed at the beginning of the section. When participants take the pretest, they view one section at a time, and all the questions in that section. The introductory text may be helpful in explaining the purpose or topic of the questions in that section. You may include HTML in this area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).

You may choose if the questions for that section are displayed in random order or the order they are entered.

You may also choose to have the system compute a section sum or average (for each participant) for the section. These scores are computed only for all the multiple-choice, numeric questions in a section. Think carefully about setting this value, because you are very limited in your ability to change it after participants have started to take the pretest or study restrictions have been placed based on the pretest.

The advantage of a section sum or average is that researchers may choose to restrict their studies based on this, instead of an individual response in the section. Often this is useful when all the questions are using a unidimensional scale (1-5, for example), but a participant’s average score response to the section is more useful to account for their outlier responses.

Depending on if you are editing or adding a section, after you save your changes, you will be taken to a page to add a new question or to the section list.

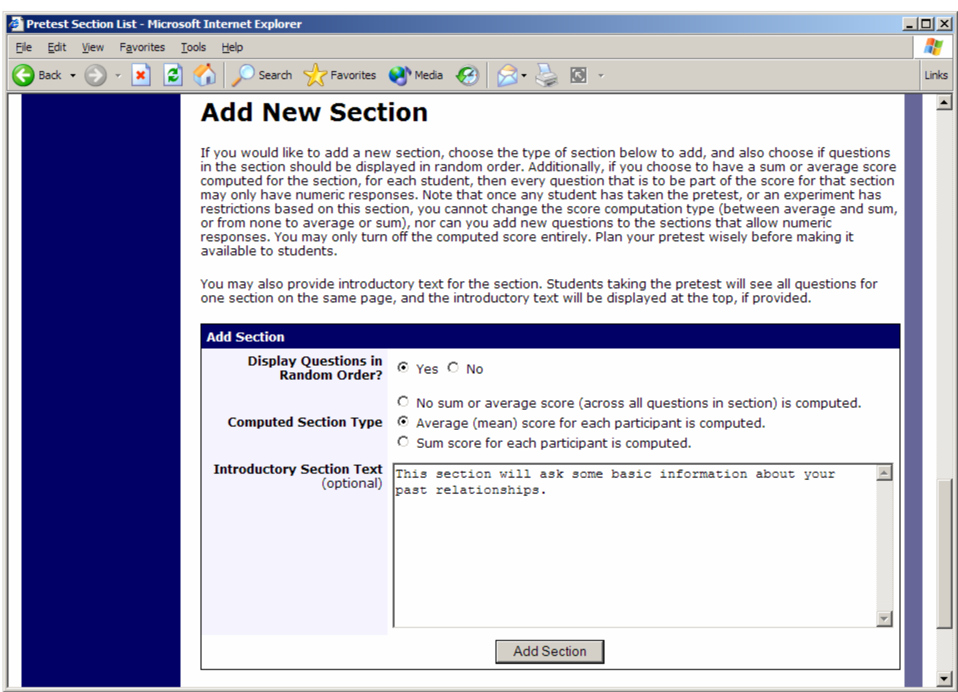


Figure 58 - Add New Section

Adding or Editing a Question

To add or edit a question, choose the appropriate choice from the Section List, next to the desired section. Depending on the state of the section and if participants have taken the pretest, some options will be automatically set for you, and not changeable. All fields must be filled out.

Field	Description
Question Text	The text for the question. This will be displayed above each question's choices.
Abbreviated Question Name	An 8-character label for the question. This is not displayed to participants and is used to name the columns that appear when the data is exported in CSV format. Many statistical analysis programs limit column names to 8 characters.
Question Type	Multiple Choice (select one), Multiple Choice (select many) or Free Entry. If the section has a computed average or sum, you may be limited in your ability to add Multiple Choice (select one) non-numeric questions. Free entry choices may contain a response up to 255 characters in length. Studies may not be restricted on free-entry choices or multiple-choice (select many) questions, but a participant's response to free-entry choices are listed when viewing a participant's pretest responses.
Display choices in random order?	If set to Yes, the choices for this question will be displayed to participants in a random order. This option only applies to multiple choice questions.
How should the choices be displayed?	Horizontal (across the page) or vertical (down the page) are the two options for how the choices for a multiple-choice question should be displayed. Often, the horizontal display is effective when the question involves a scale. This setting applies only to multiple-choice questions.
Can participants decline to provide an answer for this question?	If set to Yes, participants will see a choice below this question that allows them to opt out of answering the question. If set to No, they must answer the question.
Are all choices numeric?	If set to Yes, all choices must be numeric whole numbers (e.g. 1, -2, 10). This only applies to multiple choice questions. Studies may be restricted based on numeric

	or non-numeric multiple choice questions, however sections with a computed section sum or average may not contain non-numeric multiple choice questions.
Display numeric value?	If set to No, the numeric value of the choice is not displayed to participants. This only applies to numeric, multiple-choice questions where each choice includes both a numeric value and associated text (e.g. "5 Strongly Agree"). This is useful when running a reverse scale.

If the question is a multiple choice question, you must also fill out the choices section that is part of the same form. A minimum of 1 choice must be provided for the question. Each choice may be up to 255 characters in length. If the question is specified as numeric, you must provide a numeric choice, and that choice must be a whole number (e.g. -5, 1, 0, 349). If you would like to provide descriptive text to accompany each numeric choice, you may do so by typing in the numeric choice and leaving one blank space after it, then typing in the descriptive text, for example: "5 Strongly Agree". If you provide descriptive text along with the numeric choice, then you have the option of hiding the numeric value from participants, by choosing No to the "Display numeric value?" setting for the question. This is useful in reverse scale or other situations where the numeric value for the choices is not important.

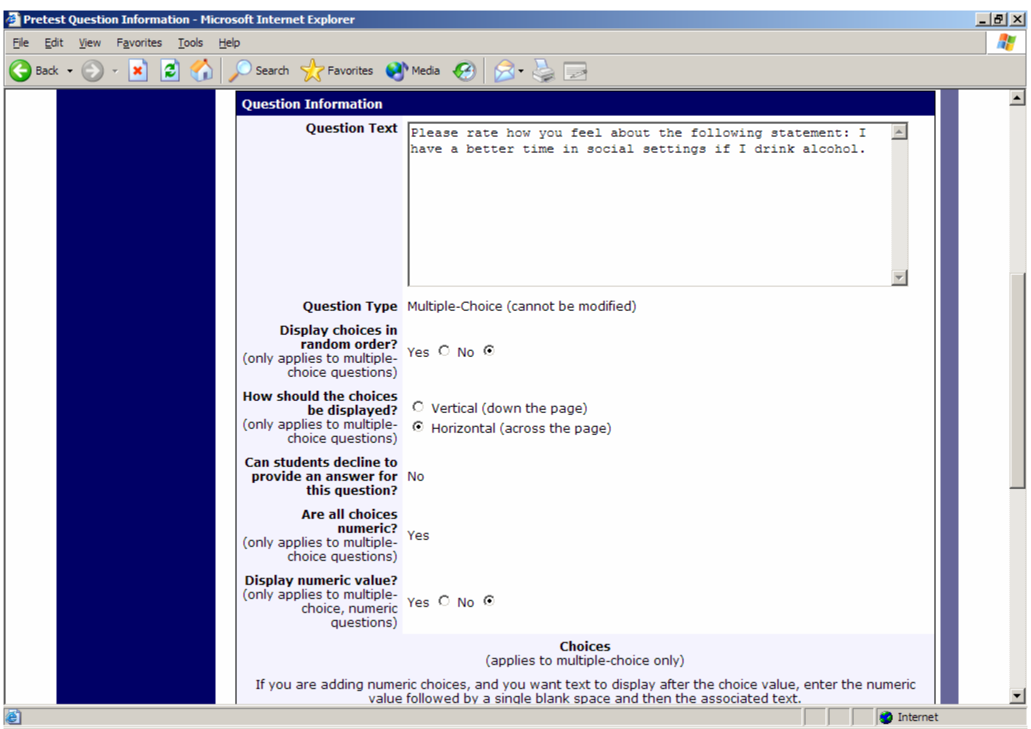


Figure 59 - Edit a Question

Copying a Section

You may copy a section from any survey into the pretest, by choosing Copy From an Existing Section in the Section List. You will see a list of eligible surveys to copy from. After you choose which survey to copy from, you will see a list of eligible sections in that survey. Once you choose a section, it will be copied into the pretest you are currently editing.

The administrator may also use the same facility when editing an online survey, to copy a section from the pretest into an online survey. This can be useful to archive pretest sections into a “holding” survey. Likewise, it may be useful to have researchers set up their own sections in a separate online survey, then copy that into the pretest.

Copying a Question

For multiple-choice questions, it is often the case that many questions have the same measures (choices). To make entry of similar questions easier, you may use the Copy Question feature to copy a question. Such an option is only available for multiple choice questions. To copy a question, select the question you would like to copy (when viewing the Section List). You will then be taken to a list of sections where you may copy this question to. After you decide which section you would like to copy the question to, you will be taken to a page where you can make any final changes to the copy of the question before saving it.

Saving Your Changes

When you are done, you should go to the Final Review and save your changes. Even if you plan to do further editing on the pretest later, it is **imperative** that you go to the Final Review step, as the system needs to save certain special changes and make some computations. If you do not want participants to take the pretest yet, you can save changes but keep the pretest inactive. When you save your changes, it may take a moment to save all the changes, as the system is performing a number of computations on the pretest. Please be patient, as these computations are done to make performance for participants and studies as fast as possible.

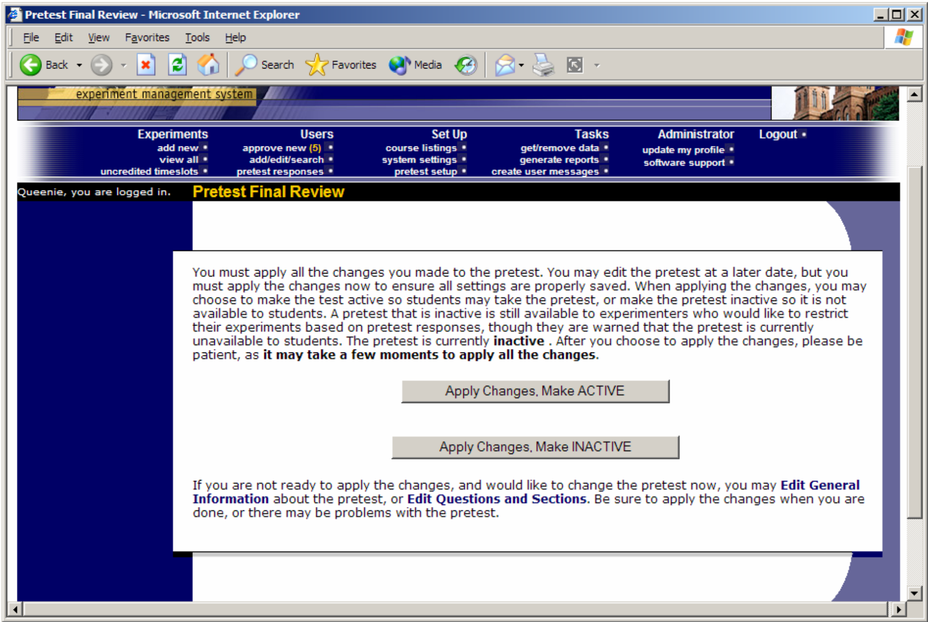


Figure 60 - Saving Pretest Changes

Deleting a Pretest

At the end of the term, you may want to delete the pretest and all relevant data. The option appears in the Get/Remove Data menu on the top menu bar, and also in the Pretest Setup. You should use this option carefully. Deleting a pretest also deletes all participant pretest responses, and removes any study pretest restrictions. This may result in unqualified participants being able to sign up for restricted studies. You may also use the Data Export option (found in the Get/Remove Data section) to save all relevant pretest information for archival or later analysis.

If you would like to delete a specific participant's pretest responses, the option is available when editing the participant's record.

If you would like to keep the pretest intact, but merely delete all participant responses and study restrictions tied to it (this is often done at the end of the term), contact Sona Systems technical support.

Generating Reports

Overview

The Reports section is accessed by an administrator by choosing the Generate Reports option from the Tasks toolbar. These reports provide various information on participant credit completion and participant participation status, as well as some information about researchers and studies. If you choose to create Instructor logins and assign Instructors to Courses, the Instructors can generate their own Credit Completion reports and you as an Administrator may not need to use the Reports feature for that purpose. All reports can be viewed on-screen, or exported in CSV (comma-separated) format, for import into popular spreadsheet programs like Excel.

If you choose to print the reports, and you find the formatting is too wide for the page, you can change the printing format from Portrait to Landscape. This change is made in your web browser, as part of the print options.

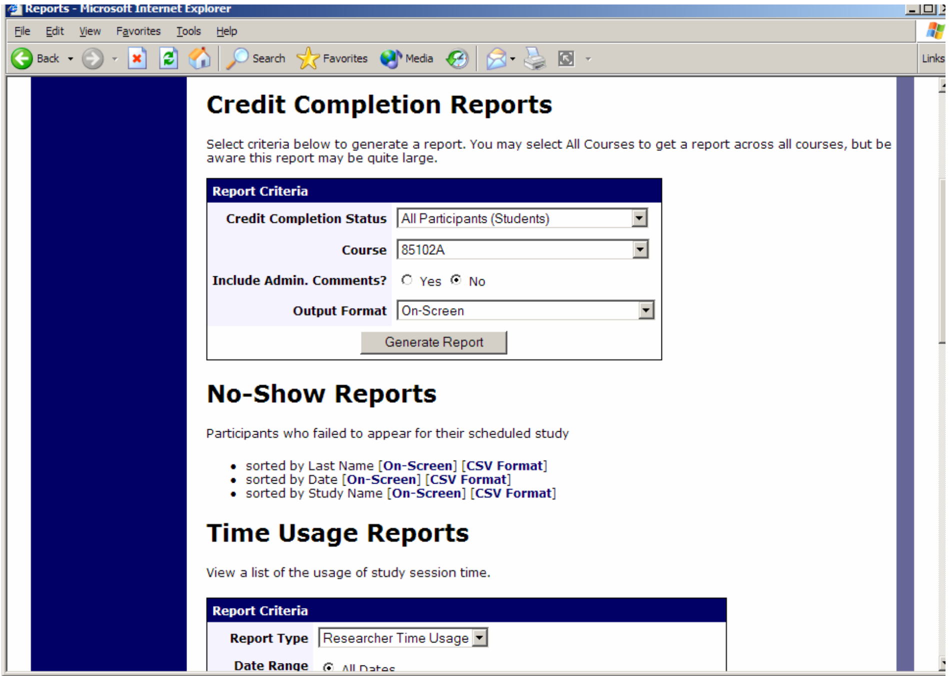


Figure 61 - Report Generation

Credit Completion Reports

The credit completion reports list the credit completion status for each participant. You can choose to list only complete or only incomplete participants, or all participants. A participant is considered a completed participant when the number of credits they have completed is at least as many as they are required to complete.

You must choose a course when generating this report. If your system is configured such that participants can assign credits to individual courses (see System Settings), the resulting report will list the participant's credit completion status overall, as well as for the selected course. If your system is not configured to allow for individual course credit assignment, then you will just see the participant's overall credit completion status. Participants who have not completed all their credit requirements are listed in **bold** for easy identification.

You may also choose to view the Admin. Comments for each participant (if there are any) are listed with the report.

The report you generate is identical to the report an instructor can generate, except instructors may not view the Admin. Comments. Thus, you may find it easier to set up Instructor accounts and allow instructors to generate credit completion reports on their own. You may click on any participant's name to go directly to their data in the system.

If you would like to generate a report across all courses, choose the All Courses option in the Course selection menu (the All Courses option is the first choice). Be aware that the report may take a while to generate if there are many participants in the system.

If you would like to generate a report of participants who are not currently linked to a course (this might happen if you adjusted their record so their course selection is "NONE"), choose the Participants without a Course option in the Course selection menu.

No-Show Reports

The No-Show report shows participants who have failed to appear for a study. You may view this ordered by the participant's name, the study name, or by date. Included in the report are any comments the researcher left when noting the no-show situation. If your system is configured to assess penalties for no-shows, it will also include information about whether the participant was assessed a penalty. If you click on the participant's name, you will be taken to that participant's record, so you may view all their progress.

If you view the report summarized by participant, then you will see a summary of all no-shows earned for each participant that has earned no-shows.

Unassigned Credit Reports

This report is available if the system is configured so that participants may assign their credits to a specific course (see System Settings). In some cases, not all credits will have been assigned to a course. Some reasons can include that the credits were from archived data, or the participant was signed up for a study with a batch manual credit grant. There is a link next to each credit if you would like to reassign the credit to a course. Participants may do this on their own, if Course Credit Reassignment is enabled in System Settings.

Time Usage Reports

The Time Usage report gives a listing of how many hours of timeslots have been used, by Study, Studies, or P.I. (if enabled). If the system is configured to enforce a limit (see Timeslot Usage Restriction in System Settings), the limit is also listed in the appropriate report. You can restrict this report to a specific period of time. If timeslots are linked to a specific researcher, this will not be reflected in the report, and it will be assumed that all usage is for all researchers (for that study). See Timeslots Linked to a Specific Researcher in the Researcher Documentation for more information.

Study Attendance Reports

The Study Attendance Report gives a listing of the ratio of credit grants to no-shows for each study. Some organizations find such a report useful, as a study with an unusually high number of no-shows may indicate poor instructions provided by the researcher.

Credit Usage Report

This report lists the number of credits used by each study. It takes into account non-standard credit grants (for example, if a study is normally worth 2 credits, but a particular participant was granted only 1 credit). Researchers can grant non-standard credits if Variable Credit Granting is enabled in system settings. Otherwise, only the administrator has such a privilege.

Resource Usage Report

If you want to look at the usage of a particular resource (timeslot locations), you may use this report will show you the use of all resources for a specific date range. This report also lists which studies are using the resource.

If location scheduling is enabled (see System Settings), then there is an option to view all timeslots scheduled where the researcher did not choose a location off the pre-defined list, as well as the opposite case.

System Summary Report

The system summary report shows basic information about the amount of data in the system.

Pretest Reports

The Pretest report shows participants who have not completed their pretest, either offline or offline, depending on your system configuration. If you do not have any pretest enforcement (offline or online) enabled (see System Settings), then this report may not be helpful. This report applies whether you are using online or offline (paper) pretests as long as you have indicated that there is some method of pretesting (see System Settings).

You may view the report sorted by a participant's last name or by course. Admin comments for each participant (if any) will be listed as well. If you choose to view the report ordered by course and a participant is in multiple courses, they will appear once for *each* course they are enrolled in. You may choose which pretest status to report on, if the pretest is enabled within the system.

Emailing a Group of Users

There are situations where you may want to send a mass email to a group of users, based on certain criteria. One example is you may want to send email to all participants who have not yet completed their requirements, reminding them of an upcoming deadline. Or you may want to email all researchers to notify them of certain information.

The system lets you send an email to participants, researchers, principal investigators, and instructors. When sending to participants, you may closely define what group of participants you send to, by course, studies they have participated in, credit completion status or earning level, no-show level, and/or pre-test completion status (when applicable).

In all cases, you may choose to send to a random subset of selected users. This is useful in cases where you don't want to generate unnecessary interest. For example, there may be a few new studies on the site that you want to notify participants about, but notifying all the participants would be undesirable because there are not enough timeslots for even half of them to sign up. In this case, you may choose to send the notification only to a random 50% of selected users.

You may also choose to exclude participants who have participated in certain studies. This is useful if you are sending an announcement about specific studies, and want to leave out those who have already participated in those studies.

You must specify a message to be sent. The system will send the email with the subject "Special Announcement" and the name of the system (see System Settings), along with your message. Each email is sent so that the other recipients of the email are not revealed, for privacy reasons. If you are sending the email to participants, you may choose to have the system automatically include the participants credit completion status (e.g. "You have completed 3 out of the 4 credits you must earn.") in the email.

To use this feature, login as an administrator from the Tasks toolbar, choose Create User Messages | Mass E-Mail Notification.

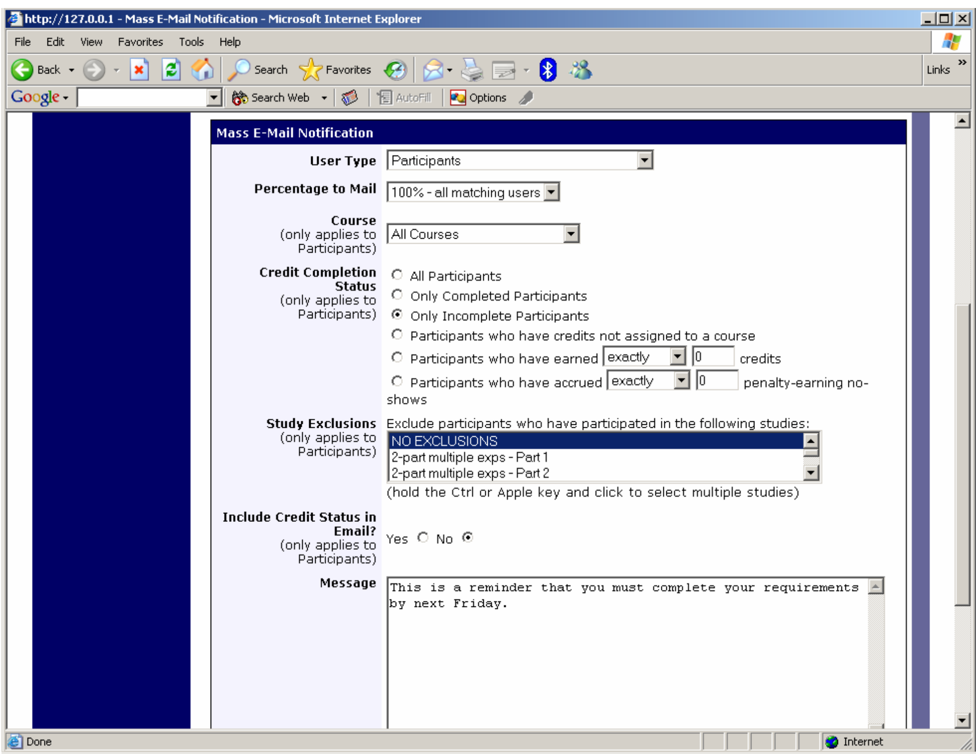


Figure 62 - Mass E-Mail Notification

You may choose what type of users to send to, and enter your message. Click Send Messages… to proceed. You will be asked to confirm that you would like to send the message. The system sends messages in groups of 300 (or less, depending on how your system is configured) at a time to prevent problems with mail servers that employ a throttling limit. You will be asked to proceed and send any additional messages, if your message was destined for more than 300 people. The system will notify you when all messages have been sent successfully.

Nightly Reminder Emails

If the Automatic Reminder Email feature (see System Settings) is enabled, participants will receive a reminder email of any studies they have scheduled for the following day. This email will only be sent for studies for which participants have not already received credit. Normally, participants will not have already received credit for a study before it is to occur, but this may be the case with an online study, since those do not have a scheduled participation date, but rather a participation deadline date.

If anonymous ID codes are enabled on your system, the reminder will also include the participant's ID code, and a reminder that they should bring this code with them to the study.

If a researcher has chosen to enable the reminder email for themselves, they will receive an email to remind them of their timeslots scheduled for the following day. They will also receive an email if they timeslots more than 2 days old that they haven't dealt with.

Customers who use this feature *and* run the software on their own servers should not set the emailing script to run at exactly midnight, or at any time between 11:45pm and midnight. The reason for this is that the switchover of day that occurs at midnight may cause a discrepancy about when the script determines "tomorrow" is. Customers who have their software run by Sona Systems do not need to worry about this issue.

Batch Operations

There are some occasions where you may want to deactivate or activate a set of user accounts, adjust credits, email login information, or grant a non-study credit to a batch of users (often this is done when a group of participants completes an offline pretest) in bulk. This can all be done with the Batch Operations feature, which is available from the Get/Remove Data menu choice from the Main Menu.

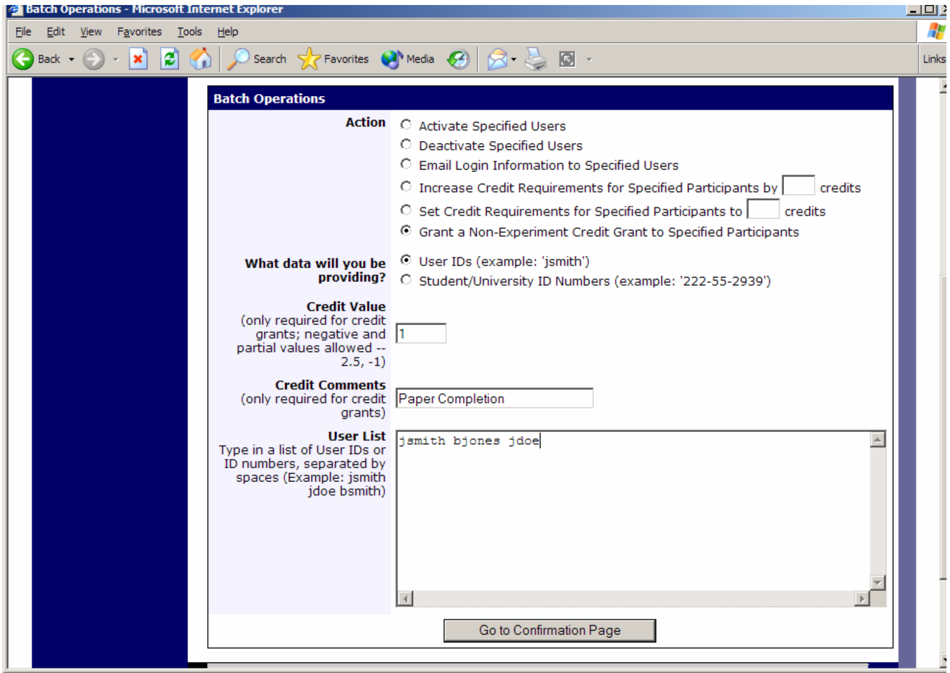


Figure 63 - Batch Operations

You may specify a set of users by either their user ID or University ID number, but you must be consistent (i.e. supply only one type throughout). The IDs may be pasted into the User List box, separated by spaces.

If you are granting a non-study credit (available only for participants), you must specify the credit value, and a comment about the credit. This comment will be visible to participants. Because a non-study credit grant is a special case, participants will not receive an email notifying them of this credit grant, even if Credit Notification Email is enabled (see System Settings).

If you choose to deactivate users (this applies to any type of user account), the chosen users' accounts will be deactivated (so they cannot log in), but not deleted.

You may also adjust a participant's credit requirements by setting them to a fixed value, or increasing them by a specified value.

There is also the option to email a group of users with their login information.

After you choose which operation you would like to perform, you will be taken to a confirmation page so you can verify the proper users were found, and you may then continue.

You will have little success performing such operations on participant accounts, if you are providing University ID numbers and Student ID Deactivation is set to Yes (see System Settings). In that case, there is no University (Student) ID number stored in the system for participants, so there is nothing to match on. In this situation, you should use the User ID instead.

Granting Non-Study Credit

There are often occasions when you want to grant a participant credit that is not associated with a study. Many schools offer participants an option to write a paper instead of participating in studies. You may also need to grant a non-study credit for some other unusual case. You can even deduct participant credit by granting them a negative number of credits (-1, -2, etc.). Partial credits are allowed, up to one decimal point of accuracy (e.g. 1.5, 0.5, etc.).

To grant credit, find the participant's record by going to the Add/Edit/Search option from the Users toolbar. When you find the desired participant and click on Update, you will see an option at the bottom of the page to grant them credit. Choose the number of credits you would like to grant (type in a negative number to deduct credit). You may also assign the credit to a class, if class credit assignment is enabled (see System Settings). Finally, you may (optionally) enter comments about this credit grant ("Research Paper", etc.). The credits will be granted as soon as the changes are saved. It should be noted that an email notification of this credit grant will *not* be sent to the participant (it is a special case), even if email credit notification is turned on (see System Settings).

If you need to grant a Non-Study Credit grant to a large group of participants (typically this is done after participants complete an off-line pretest), use the Batch Operations feature instead (in the Get/Remove Data menu).

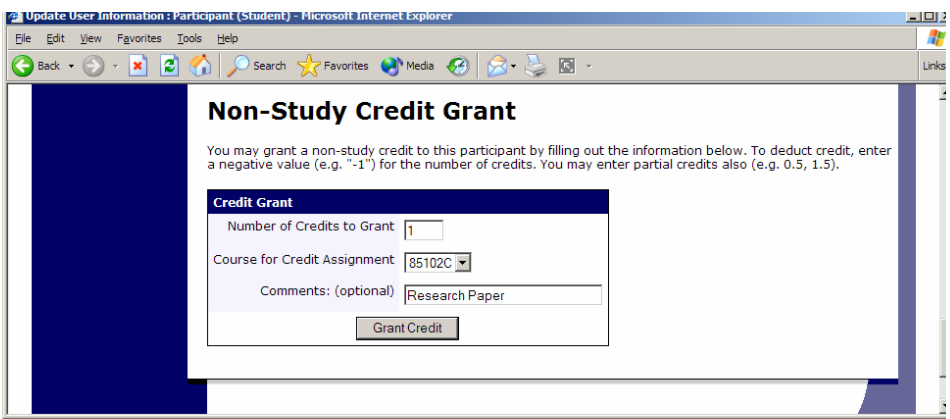


Figure 64 - Non-Study Credit Grant

Course Maintenance

All participants must belong to at least one course. The system may also be configured such that participants may belong to multiple courses (see System Settings).

The Course Maintenance section is accessed from Course Listings choice in the Set Up toolbar when logged in as an Administrator. Typically, you will need to set up courses when you set up the system, but very little maintenance will be required after this.

If your system is configured to allow participants to create their own accounts (see System Settings), you will see a "Selectable?" Yes/No option. For each course, if you choose Yes to this option, then the course will appear as a choice on the form where participants create their own accounts. The reason you may want to prevent participants from selecting certain courses is if you've created special case courses (for instance, a "course" that contains participants who failed to complete their requirements the previous semester, from any course). As a semester ends, you may choose to keep a course listed in the system, but not make it Selectable, for historical tracking purposes.

For each course, you must specify the number of (study) credits required of participants in that course. A fractional value (e.g. 1.5, 3.5) is allowed, as is the value 0 (which usually is the case when participants receive extra credit for participation). If a participant is allowed to belong to multiple courses (see Multiple Course Support setting in System Settings), then their credit requirements will be computed based on the value of the Multiple Course Requirements setting (see System Settings). The requirements are only computed at the time the account is created, but they can be adjusted for each individual participant if necessary (see Adding and Editing Users).

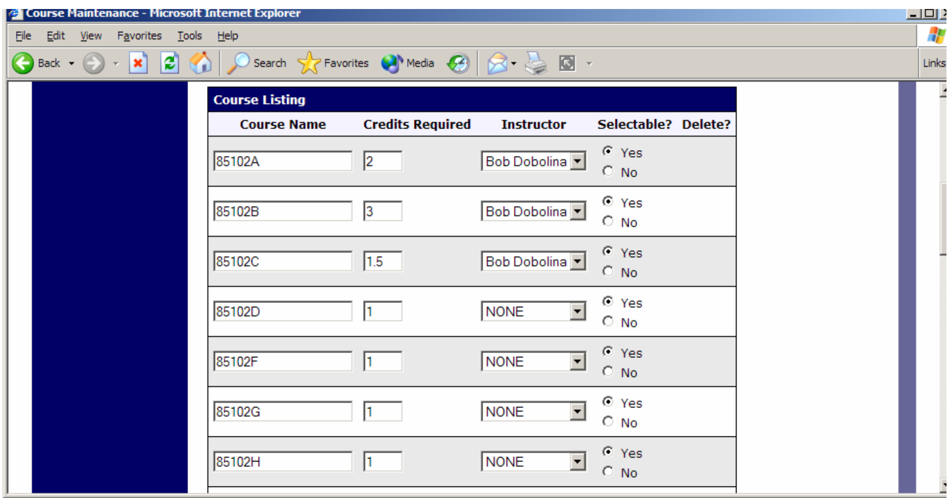


Figure 65 - Course Maintenance

A delete option will appear next to eligible courses which may be deleted. Courses are eligible for deletion if no students or courses are linked to the course. The course may also be deleted if all credits linked to the course are 0 (which would be the case if participation history was retained from a previous semester). If a student is linked to a course that is deleted, they will be removed from that course. If that is the only course they were in (so that now they are in no courses), they will be asked to select a course upon their next login. In cases where removal from a course or deletion of retained sign-ups is a possibility, the word "dependencies" will be listed below the deletion option for that course.

Some organizations do not have separate courses, or no courses at all, when they run their subject pool. In this situation, it is recommended to create just one "generic" course (e.g. "Participant Pool"). If there is only one course in the system, and participants are allowed to create their own accounts, they will not even see a course selection option, as they will automatically be placed into the only available course.

If there are sections of the same course, it is advisable to make each a separate "course" in the system (e.g. "Psych 100 Section A", "Psych 100 Section B") if there is a reason to treat them as separate groups (often due to different instructors or different course credit requirements. If there is the opportunity for confusion, it may be advisable to further qualify the course name with the instructor's name (e.g. "Psych 100 Section A, Professor Jones").

Location Maintenance and Scheduling

If location scheduling is enabled in System Settings, then the system may be used to handle the scheduling of locations (rooms/labs) when timeslots are scheduled. With such a feature, the administrator can set up a list of locations, and those locations appear on a list when researchers go to schedule their timeslots. They may pull up the schedule for a specific location, or determine which locations are available on a specific date, and schedule their timeslots appropriately. The system will prevent double-booking of locations.

In the event a desired location is not in the list of locations, the researcher may enter their own text for the timeslot they are scheduling, so they are not forced to take advantage of the built-in location scheduling feature. This is useful when the researcher is using a location that would not benefit from this scheduling, such as a study conducted in their own office. In such a situation, the researcher does not need to worry about the location being already booked, since no one else would schedule a study in their office.

The list of locations available to all researchers is set up in Location Listings, by the administrator. Each study may use only one location from the list of available locations (or researchers can type in their own text), so it is advisable to enter in locations that are as specific as possible.

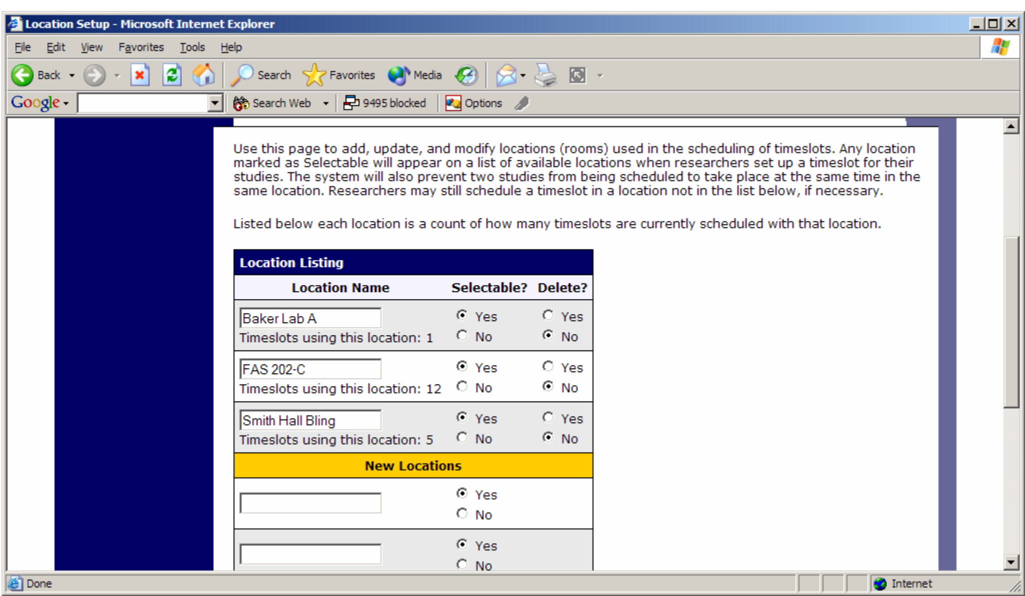


Figure 66 - Location Setup

Changes take effect immediately after they are saved. If a location is deleted and timeslots were using that location, those timeslots will remain with the same location, but the location will be treated as if the researcher manually typed it in.

If a location is not marked as selectable, it will not appear in the list of available locations when researchers go to schedule a timeslot. This is useful if a location is temporarily unavailable (for example, due to renovations) but will be available again in the future.

End-of-Semester Maintenance

The software itself does not have a concept of semesters or terms, nor does it enforce any semester concept. Your license grants you the right to use the software for as many "semesters" as you like, within the time period granted by the license. Some institutions find no need to clearly define semesters because they run an ongoing participant pool, while others find it very helpful.

When the end of your term, whatever term that may be, occurs, there is some end of semester maintenance you might like to perform. Typical end-of-semester maintenance would involve exporting a copy of the data for archival purposes, then clearing it out of the system in bulk, in preparation for the start of a new term. At a minimum, most institutions clear out all the participant accounts and sometimes the studies, though they usually leave the researcher accounts if those stay the same from term-to-term. You also have the option of retaining key data and carrying it over, specifically participation data. This is useful if you want to prevent a participant from participating again in a study they participated in during the previous term.

The participation history retention option will reset the credits earned (and any no-shows) to 0 for the timeslots where participation history is retained. If a sign-up as marked as a penalty-earning no-show, it will be converted to a no-penalty no-show but its previous status will be marked in the comments for that sign-up.

It should be noted that once you clear out this data, it cannot be retrieved. Use this feature carefully, as it deletes large amounts of data. It is highly recommended that you perform an export of the data, in Archival format, in case the data later needs to be recovered. Note there is no automated method for re-inserting data that is in Archival format into the system, but Sona Systems can do this for you in the rare case that it is necessary.

If you do not find an option that suits your needs (for example, you want to retain study participation history for studies that took place over a specified period of time), simply contact Sona Systems Technical Support and the adjustments can easily be made for you.

Exporting Data

While the data export feature is typically used at the end of the semester, you may use it at any time, as many times as you like. Exporting data will not erase it from the system. Use the feature to clear out old data (documented in the next section) if you would like to delete mass amounts of data from the system.

The data export feature lets you export entire sets of data, in standard comma-separated (CSV) format. CSV is a standard form which most programs, including Microsoft Excel and Microsoft Access, can understand and work with properly.

As the data export may contain sensitive information, you should handle the data you export carefully. See the Regulatory Compliance section in this documentation for more information.

The system allows you to export the CSV-formatted data in either Archival or Analysis format. The Archival format is “normalized” data, and makes it easier to import the data into a database system like Microsoft Access. It is also a format that is useful if the data ever needs to be recovered back into the system. The Analysis format is useful for importing the data into a spreadsheet program like Microsoft Excel, for data analysis. It contains “de-normalized” data that makes it easier to analyze. If you are not sure which format is best, you can always export the data in both formats.

To start the data export, make sure you are logged in as an administrator, and go to Get/Remove Data | Data Export from the Administrator toolbar. You will see a list of choices for the type of data (tables) you can export, and what data is included in each export. If you want to export all the data for archival purposes, you should make sure to export every table, in Archival Format.

When you click a link for the type of data and format you would like to export, one of three scenarios will happen in your web browser, depending on how your web browser is configured. Listed below is what you should do depending on how your browser responds. When saving data, it is recommended you save the files with a “.CSV” extension.

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

Clearing Out Old Data

After you have made a backup copy of data with the Data Export feature, you may elect to clear out (erase) old data. To get started, access the feature by choosing Get/Remove Data | End of Semester Maintenance from the Administrator toolbar, while logged in as an administrator.

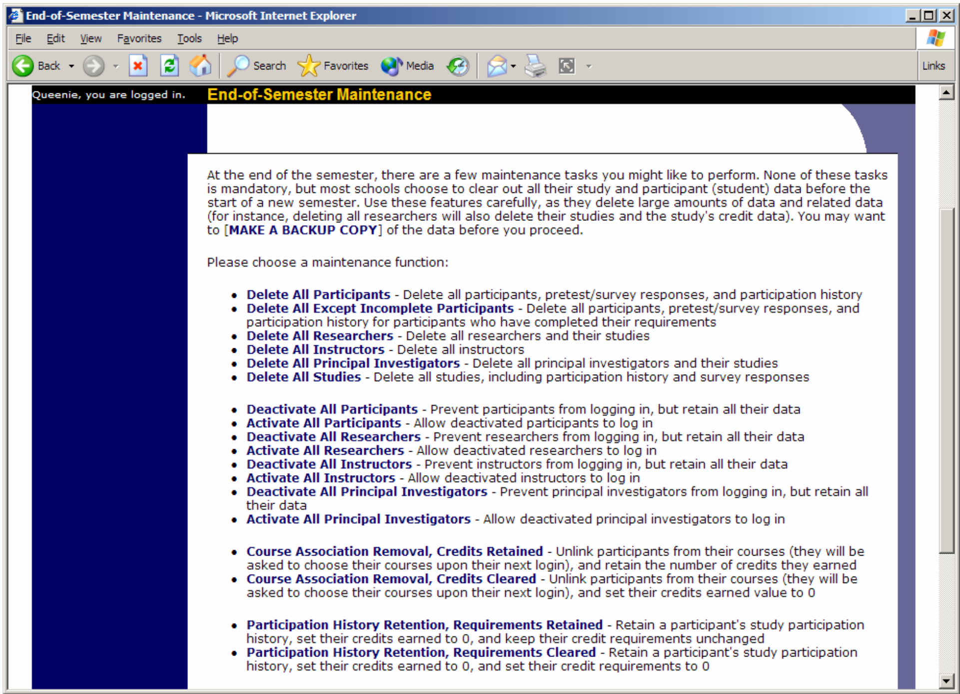


Figure 67 - End-of-Semester Maintenance

You will be given a number of choices of what types of data to delete or modify. Listed below is a description of those options, and what data may be deleted or modified as part of that option. Not all options may appear on your system, depending on how your system is configured.

Option	Data That Is Deleted or Modified
Delete All Participants	All participant account data is deleted, as well as their credit and sign-up information.
Delete All Except Incomplete Participants	All the same data is deleted as for All Participants, but only for participants who have earned at least as many credits as they are required to earn.
Delete All Researchers	All researchers, their studies, sign-ups, timeslots, and participant sign-up data is deleted.
Delete All Instructors	All instructor accounts are deleted. If they were listed as an instructor for a course, the course remains but with no instructor.
Delete All Principal Investigators	All principal investigators, their studies, sign-ups, timeslots, and participant sign-up data is deleted.
Delete All Studies	All studies, sign-ups, timeslots, survey responses, and participant sign-up data for studies is deleted.
Deactivate All Participants	All participant accounts are deactivated so

	they may not login to the system, but all their information is retained.
Activate All Participants	All participant accounts are activated so they may login to the system. All their information is retained.
Deactivate All Researchers	All researcher accounts are deactivated so they may not login to the system, but all their information is retained.
Activate All Researchers	All researcher accounts are activated so they may login to the system. All their information is retained.
Deactivate All Instructors	All instructor accounts are deactivated so they may not login to the system, but all their information is retained.
Activate All Instructors	All instructor accounts are activated so they may login to the system. All their information is retained.
Deactivate All Principal Investigators	All principal investigator accounts are deactivated so they may not login to the system, but all their information is retained.
Activate All Principal Investigators	All principal investigator accounts are activated so they may login to the system. All their information is retained.
Course Association Removal, Credits Retained	Unlink participants from their courses (they will be asked to choose their courses upon their next login), and retain the number of credits they earned. Participation history is retained.
Course Association Removal, Credits Cleared	Unlink participants from their courses (they will be asked to choose their courses upon their next login), and set their credits earned value to 0. Participation history is retained.
Participation History Retention, Requirements Retained	Retain a participant's study participation history, set their credits earned to 0, and keep their credit requirements unchanged. A comment will be added to the retained records noting the credit (or penalty) value prior to the retention, and the actual credit/penalty values will be reset to 0.
Participation History Retention, Requirements Cleared	Retain a participant's study participation history, set their credits earned to 0, and set their credit requirements to 0. A comment will be added to the retained records noting the credit (or penalty) value prior to the retention, and the actual credit/penalty

	values will be reset to 0.
Old Timeslot Deletion, Empty Timeslots	Delete all timeslots within a specified date range that do not have any sign-ups.
Old Timeslot Deletion, All Timeslots	Delete all timeslots within a specified data range, even if there are sign-ups.
Delete All Pretest Information	All pretest responses, pretest questions, and study restrictions based on pretests. See Deleting a Pretest for more information.
Delete All Pretest Responses	Delete all pretest responses, but keep pretest intact.
Adjust All Studies	Adjust all studies at once, including whether they are visible, active, and any timeslot usage quotas on the studies.
Timeslot Usage Quota Adjustment	Set the timeslot usage quota for all researchers or P.I.'s to a specific value, or to a specific value above their current usage level. This only applies if timeslot usage quotas are implemented at this level (see System Settings).

The Old Timeslot Deletion choice is useful when you normally retain participation history, but want to delete very old timeslots as those are no longer worth retaining, while retaining older timeslots that aren't quite as old. You may choose either to delete only empty timeslots (timeslots which had no participants signed up), or all timeslots within the specified date range. Note that you can only delete old timeslots that had sign-ups if the timeslots were previously archived with Participation History Retention, which means the credit and no-show values for the sign-ups were set to 0.

As you can see from the table above, large amounts of data are deleted or modified when using these options. Use these options carefully. When you choose any of the options, you will be given a warning and a notice of how many records will be affected, with the choice to proceed.

Despite the many options, there are two options that are by far most popular and will meet most needs:

1. Delete All Participants and Delete All Studies. This deletes all the sign-up history and credit history, allowing for a fresh start.
2. Course Association Removal, Credits Cleared and Participation History Retention, Requirements Cleared. This keeps track of the studies a participant participated in, while clearing all their credit earnings and requirements, and forcing them to select which courses they are in upon their next login.

If the options provided don't exactly match how you would like to handle data at the end of the semester, please contact Sona Systems Technical Support to have the maintenance done for you. It is also possible that you need to use more than one of the options to do exactly what you need.

Monitoring Studies

As an administrator, there may be occasions when you need to modify or monitor a study. You might need to deactivate a study that was activated due to a recent IRB disapproval. Alternatively, you may need to grant credit to a participant because the researcher failed to do so. To view and modify studies, choose the View All option from the Studies toolbar. You will see a list of all studies, and you can change anything about them just as if you were the researcher. Read the researcher documentation for more information on researcher features.

Batch Study Updates

If you would like to modify key attributes about many studies at once, you may do so using the Batch Study Update feature. This allows you to adjust whether a study is active and/or visible to participants, and the study's timeslot usage limit (if applicable) for any studies you select, all at once.

To access this feature, click on View All Studies and choose the Batch Study Update. Adjust the studies as you desire, and click Save Changes to save your changes. You may also adjust all studies at once to the same specified setting or value using the options at the bottom of the page.

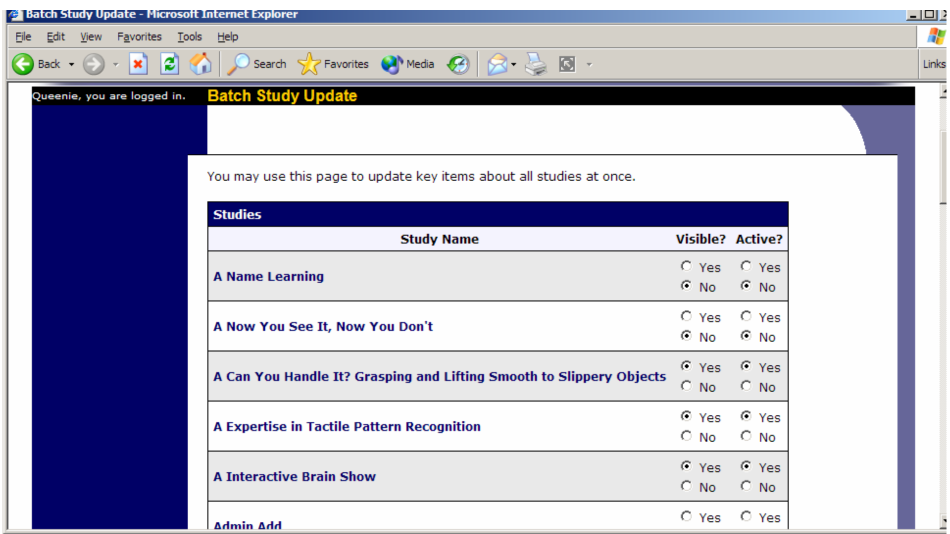


Figure 68 - Batch Study Update

Updating System Text

There are a few areas in the system where you may specify text to be displayed on-screen or included in an email notification. All of these can be set by going to Create User Messages | Update System Text. All are optional, and you may just leave them blank if you desire.

Some of the items allow you to specify basic HTML (and are noted appropriately), and a basic HTML guide is included on the screen. All changes take effect immediately after you save the changes.

The text you may change includes:

- The text that is included in the email sent to participants when their account is created. Here you may want to let them know about any special instructions that they as new users may not already be aware of.
- The text that is displayed on the page where participants may request their own account (Participant Account Self-Creation is enabled in System Settings). Here you may want to outline any policies the participant must adhere to by registering with the system.
- The text that is displayed on the front page of the site (just above the login box). Here you may want to list any special announcements or login instructions.
- The text that is displayed when participants view the Human Subjects/Privacy Policy.
- The text that is displayed on the page where participants view their credit status. Here you may want to remind them of any special policies.
- The text included in the email that is sent when a participant signs up for a student. This email is only sent if sign-up confirmation emails are enabled in system settings.
- The text included in the email that is sent when a participant is granted credit for a study. The email is only sent if Credit Notification is enabled in System Settings.
- The text included in the email that is sent when a participant is marked as a no-show. The email is only sent if Credit Notification is enabled in System Settings, and the same text you provide (if any) is include for both penalty-earning and no-penalty no-shows. This is a great place to remind participants of any consequences from receiving a no-show.

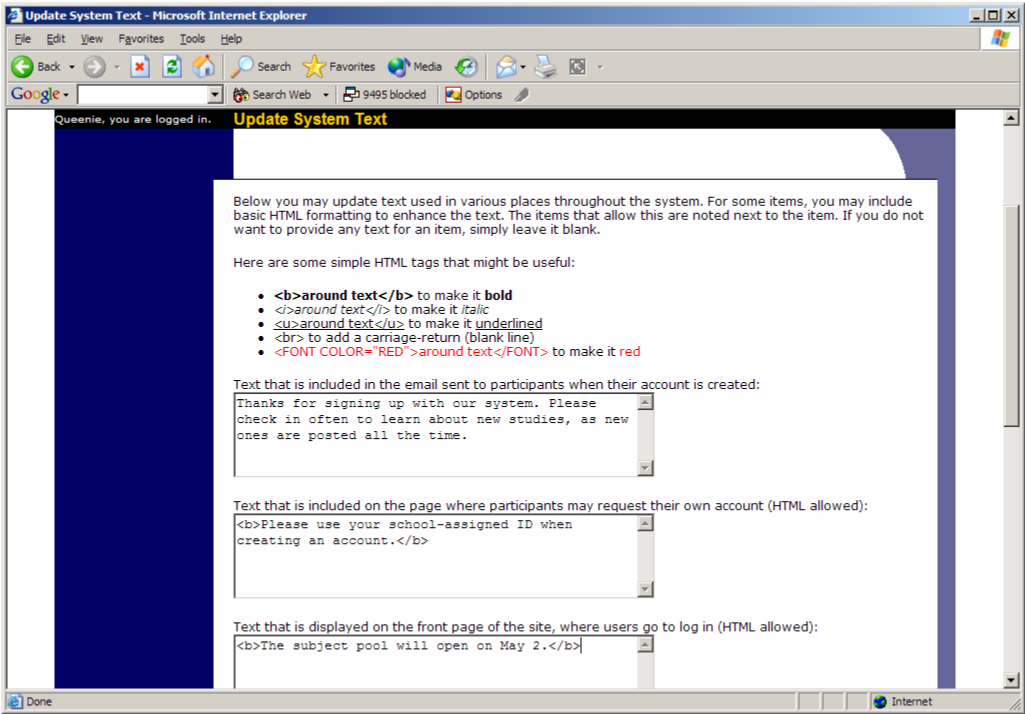


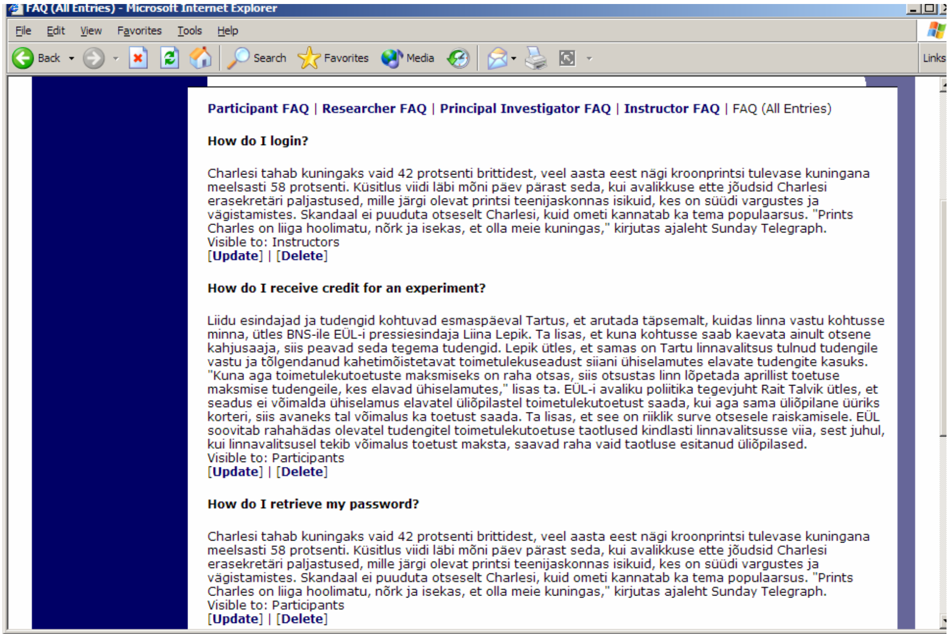
Figure 69 – Updating System Text

Frequently Asked Questions Feature

The easiest way to provide users with answers to common questions is through the Frequently Asked Questions (FAQ) feature. Using the FAQ feature, you may enter a set of questions and answers, and specify for each entry what group of users is allowed to see that item. For example, you may want to restrict certain entries so only researchers (and not participants) may see them.

As an administrator, you may view the FAQ for all types of users. Researchers and principal investigators may view the participant FAQ. In all other cases, the users may only view the FAQ for their own user type. The FAQ will only appear as an option for users if there is a FAQ available. For example, if there is no instructor FAQ, then the link will not appear for instructors.

To update and add new items to the FAQ, login as an administrator and go to Create User Messages| Frequently Asked Questions from the Tasks toolbar. From there, you may view all FAQ entries, and add, update, or delete entries. You may include HTML in the FAQ answer area, but please be sure you know what you are doing. If you would like to add a carriage-return (paragraph break), simply type in “<p>” (without the quotes).



Requesting Technical Support

The software features an automated support request feature. If you have a problem or question about the software, choose the Software Support | Contact Technical Support option, which is in the Administrator toolbar. Enter your email address and a description of your problem. You may also choose to have login information sent to Sona Systems to aid in troubleshooting the problem you may be having.

There is also a link to a system diagnostics page. If your software is installed on-site, you may find this page useful in providing basic diagnostics to verify that your system is properly installed.

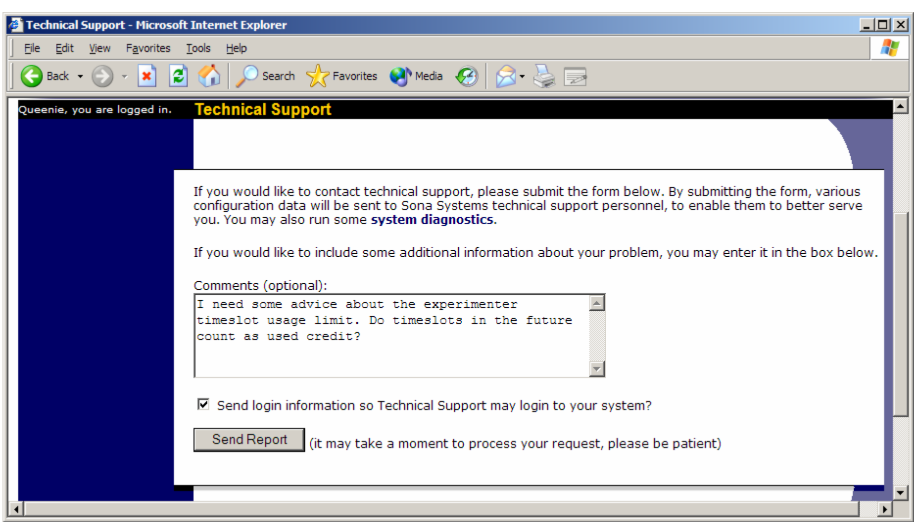


Figure 70 - Technical Support Request

Frequently Asked Questions (FAQ)

I have a few people who act in multiple roles (e.g. researcher and administrator). How should I create their account in the system?

You should create two accounts for them, as each user type has a different set of privileges. See the Duplicate User IDs section of this documentation for more information.

I would like to deduct or add credit from a participant. How do I do this?

The easiest way is through the non-study credit grant feature. You have the option to grant a negative credit if you would like to deduct credit, or you may grant a positive credit. See the Granting Non-Study Credit section of this documentation for more information.

A participant failed to show up for a study and did not properly cancel, but there were extenuating circumstances and we would not like to penalize the participant. How should this be handled?

Researchers should take some action on every study timeslot that has occurred. If you system is configured to assess penalty credits, then the researcher will have the option to indicate the participant did not show, and whether the no-show was worthy of a penalty (in this case, it is not).

If your system is not configured to assess penalty credits, then the researcher should indicate the participant was a no-show.

The reason to always properly indicate a no-show for a participant is that the system makes certain pre-requisite enforcement decisions (and other decisions) that depend on whether the participant participated in the study or was a no-show.

You may also cancel the participant’s sign-up, if appropriate.

I want to change the number of credits a participant must complete, for a particular participant (as opposed to changing the default setting). How do I do this?

Edit the participant’s record (see Editing Users) and you can adjust their credit requirements. Partial credits are allow up to one decimal point of accuracy (e.g. 0.5, 1.5, etc.).

Participants go to create their own accounts, but no courses show up on the account request form and they seen an error instead. What is wrong?

You need to create at least one course that is Selectable. See Course Maintenance in this documentation for more information.

I would like to export a copy of the data, for archival purposes. How do I do this?

You can use the Data Export feature for this, at any time. See Exporting Data in this documentation for more information.

One of our researchers works for a different organization, and thus they do not have an email account in our organization's email system. How do I setup their account?

When you create their account, choose a username that is not already used and is not a currently valid email account. Then, specify their real email address (at the other organization) in the Alternate Email field. By specifying the alternate email address, the alternate email address will be the address that is visible to other users of the system.

Can there be different sign-up or cancellations deadlines for each study?

Yes, if study-level deadlines are enabled on your site (see System Settings).

System Settings

System settings are accessed from the System Settings choice on the Set Up toolbar. You must be logged in as an Administrator to access this option.

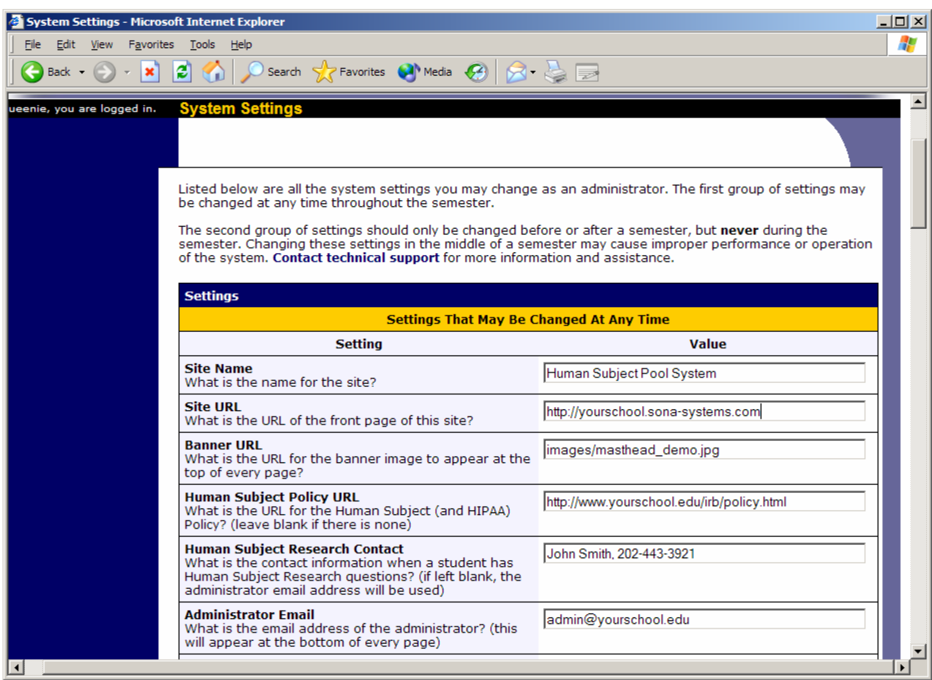


Figure 71 - System Settings

System settings are organized into two sections. The first section contains settings that may be changed while there is data in the system. The second section contains settings that should *only* be changed if there is no data in the system. Do *not* change this second group of settings at any other time, as it can lead to corruption of data, as well as unexplainable results. If you absolutely must change a system setting from the second section while there is data in the system, contact Sona Systems technical support *first* and they will provide guidance on how to safely change these settings.

System settings are accessed from the System Settings choice on the Set Up toolbar. The form provides an easy method to change any settings. Changes you make will be reflected immediately after you save the changes. All settings below are required unless otherwise noted.

Settings That You May Change at Any Time

Setting Name	**Description**
Site Name	The name of the system. This is used throughout the system as the header/banner at the top of the screen. It is also the From: name on emails generated by the system. Most organizations choose a name that includes "System" at the end (e.g. "Research Participation System") but such a naming convention is not mandatory.
Site URL	The URL (web address) for the site. This is used in emails sent to users with their login information, and in some other places throughout the system. The URL should start with the conventional http:// to indicate it is a URL.
Banner URL	The URL (web address) for the banner/masthead image that appears at the top of every page on the site. If the image is located on a server different from the software, it should start with http://. If it is located on the same server as the system, it may be a "relative" URL and will likely start with "/". Banner images may be of any size, but the recommended size is 500 pixels wide and 85 pixels tall, in JPG or GIF format.
Human Subject Policy URL	This field is optional. If your organization has a URL for its policy on human subject research and/or or its privacy policy, then you can place the URL here. The URL should start with "http://". If provided, this link will be provided to all logged-in users in the Human Subjects/Privacy Policy link at the bottom of every page.
Human Subject Research Contact	This field is optional. If not provided, the Administrator Email address will be used. This is a free-form field, so you can type in as much contact information as necessary. One example value would be "John Smith, jsmith@yourshool.edu, 415-555-1212, Smith Hall 332". This information is listed in the Human Subjects/Privacy Policy link at the bottom of every page.

Administrator Email	The email address of the administrator. This is used as the From (sender) address on all system-generated emails, including credit notifications, password reminders, and study reminders. It should be a valid email address. Some organizations create a special email address expressly for this purpose, with a generic address like "research_pool@yourschool.edu". This email address is also listed at the bottom of every page as the contact email if users have questions.
Participant Human Subject Policy Acknowledgment	Yes or No value to indicate if participants must acknowledge the Human Subjects/Privacy Policy before they may use the system. If set to Yes, they must acknowledge it once every 6 months, and their acknowledgment status will be listed in their record when the Administrator views it. If you handle this type of acceptance before-hand (on paper, for instance), then it is usually not necessary to enable this feature.
Researcher Human Subject Policy Acknowledgment	Yes or No value to indicate if researchers and principal investigators (when applicable) must acknowledge the Human Subjects/Privacy Policy before they may use the system. If set to Yes, they must acknowledge it once every 6 months, and their acknowledgment status will be listed in their record when the Administrator views it. If you handle this type of acceptance before-hand (on paper, for instance), then it is usually not necessary to enable this feature.
Human Subject Policy Type	Choose the research and privacy regulations that your organization must comply with. The choices are United States (HIPAA and Common Rule), Canada (PIPEDA and Tri-Council Statement, or European Union (OECD and EU Directive). The system will automatically adjust the policies based on your selection.
IRB Name	The name of the group that approves studies. Usually called an IRB, REB, or HSB. The name may be up to 20 characters, and this name will be used when identifying the IRB to researchers and participants.
Default Study Length	The default length of time for a study, in minutes. Researchers may change this value on a study-by-study basis.
Sign-Up Time Threshold	The latest time before a study is to occur that a participant may sign up for a study. You may choose a rolling time window (e.g. 24 hours before the study is scheduled to occur), a fixed time (e.g. 5pm the day before), or allow this to be specified on a per-study basis. The fixed time setting always indicates the day *before* the study is to occur.

Cancellation Time Threshold	The latest time before a study is to occur that a participant may cancel their sign-up for a study. You may choose a rolling time window (e.g. 24 hours before the study is scheduled to occur), a fixed time (e.g. 5pm the day before), or allow this to be specified on a per-study basis. The fixed time setting always indicates the day *before* the study is to occur.
Time Threshold Includes Weekends	Yes or No value to indicate if the system should factor in weekends when enforcing the sign-up and cancellation time limits. If set to Yes, then a deadline that would ordinarily occur on a weekend is pushed back to the Friday before the weekend. The system will push back the deadline in full days, so a rolling time window threshold that would occur at 2:30pm on Sunday would be moved to 2:30pm on Friday. If set to No, the deadline may occur on a weekend.
Random Study Order	Yes or No value to indicate if the system should list studies (to participants) in random or alphabetical (by study name) order. All non-participants will always see studies listed in alphabetical order.
Credit Display	Yes or No value to indicate if the credit value for studies should be listed on the study listing page, for participants. The credit value will always be visible once a participant clicks on a study to learn more about it. The reason to disable the credit display from the main study listing page is if there is a concern that participants are more or less likely to view studies that have a higher credit value. If set to Yes, the credit value will be displayed on the study listing page.
Available Study Display	Yes or No value to indicate if all (active, approved) studies should be displayed to participants when they go to view the list of studies. If set to No, then only those studies with available timeslots will be listed. It may be useful to set this to Yes if there are frequent changes in timeslot availability and you want to make a participant aware of studies even if there are no timeslots available at the moment.
Participant Progress Display	The starting date to display activity when a participant views their progress. Activity prior to this date will not be displayed unless the participant clicks an option to do so. This is useful to avoid clutter and confusion on this page, if older studies are kept in the system for archival purposes.
Variable Credit Grant	Yes or No value to indicate if researchers can grant partial credit to a participant for study participation. If set to Yes, researchers can grant from 0.5 credits to 2

	times the study's credit value. This is useful when a study runs longer than expected or a participant leaves the study early.
Instructor Study Viewing	Yes or No value to indicate if instructors can view the studies available in the system. This is useful if instructors would like to know what studies are available so they can integrate such information into their instruction. Even if this feature is enabled, instructors still cannot see any timeslots nor who has signed up for the study, for privacy reasons. If set to No, instructors may not view any studies.
Instructor Credit Grant	Yes or No value to indicate if instructors can grant non-study credit grants to participants (students) in their courses. This feature is useful if credit for a research participation alternative is handled directly by the instructor. If set to No, this feature will not be available to instructors, but still remains available to the administrator.
Sign-Up Confirmation Email	A choice indicating if the system should email a participant with a confirmation of their study sign-up, immediately after they sign up. It can also be sent when the participant cancels their sign-up. Note that when someone other than the participant cancels the sign-up (e.g. the administrator or researcher), a confirmation email is *always* sent since the participant may not otherwise be aware of it.
Automatic Reminder Email	Yes or No value indicating if the system should send a reminder email to participants the day before they are scheduled to participate in a study. If set to yes, an email will be sent automatically the day before their study.
Credit Notification Email	Yes or No value indicating if the system should send an email to the participant when they are granted (or revoked) credit for a study. If set to Yes, an email will be sent.
Administrator No-Show Notification Email	A numeric value indicating after how many no-shows a participant receive should the administrator be notified by email. Some schools like to disable a participant's account after they accumulate a number of no-shows. The administrator should review the participant's account before deactivating it, in case the researcher later changes the no-show to a credit grant. Set this value to 0 to disable the feature. If set to any value above 0, the administrator will be emailed as soon as a participant accumulates or exceeds the specified no-show value. See Participants with Excessive No-Shows

	for more information.
Administrator Account Notification Email	Yes or No value indicating if the system should email the administrator every time a new account is requested (by a participant). If set to Yes, an email will be sent. Many schools choose to disable this feature when the term is starting, as the administrator is frequently logging onto the site and checking for new accounts. As the term progresses, they enable this feature so they are aware of any account requests, as they trickle in mid-term. This feature only applies if Participant Account Self-Creation is enabled.
Administrator Pending Timeslots Email	A choice indicating if the system should send a notification email if there are pending timeslots in the system more than 2 days old that have not been dealt with. You may choose to have this sent for al studies, or only non-online studies. The reason not to enable this notification for online studies is that online study notifications are considered eligible (for a notification to be sent) as soon as the sign-up has occurred, since it is difficult to determine when the sign-up occurred while figured the two-day threshold. This email is sent once per day, and only if there are timeslots that meet the criteria.
Automatic Account Approval	Yes or No value indicating if participant account requests should be approved immediately, without administrator intervention. This feature only applies if Participant Account Self-Creation is enabled. To receive notification of these automatic approvals, enable the Administrator Account Notification Email setting.
Automatic Credit Granting	Numeric value indicating whether the system should automatically grant credit to a participant if the timeslot is more than X hours old, and the researcher has taken no action. The value for X indicates the number of hours old a timeslot must be before it qualifies for an automatic credit grant. For example, if this was set to 5, then only timeslots more than 5 hours old qualify for the automatic credit grant. The automatic credit grant occurs once a day, usually overnight. The automatic credit grant also takes place for studies that are for-pay, and it also grants credit for online studies, once the participation deadline has passed. Researchers can always override an automatic credit grant later, if necessary. Set this value to 0 to disable the feature.
Lost Password Feature	Yes or No value indicating if the Lost Password feature should be enabled. If enabled (set to Yes), users may

	have their password emailed to them through a link on the front page of the site, if they forget their password. Typically, the only reason to disable this feature is if there is a concern about sending passwords over email.
Change Password Feature	Yes or No value indicating whether participants are allowed to change their password after their account is initially created. Generally this should be set to Yes, but some organizations set it to No if they have created participant accounts using a specialized password scheme.
Administrator Password Retrieval	Yes or No value indicating whether the administrator can view the existing passwords of users. If set to No, the administrator can only set a new password for a user, but not view their current password.
Study Approval	An option indicating if the administrator must approve a study before it is made visible to participants. This can be turned off entirely, enabled only when a study is added, enabled when a study is added or updated, or enabled when a study is added with an email to the administrator upon an update. Note that if approval is only required when adding a study, it is possible for a researcher to add a study, then go in and update it to make it visible to participants. If this is a concern, you should either enable email notification on the update, or enable approval for updates also. A study is considered "updated" if the descriptive text fields (name, descriptions) is updated, or a study that was not previously visible to participants is made visible. The email notification to the administrator (if enabled), will detail the changes made to these fields.
Researcher Manual Sign-Up/Cancellation	An option indicating if researchers can sign up and/or cancel a participant for their study. The sign-up option is useful if researchers have a need to override a study's restrictions (pre-requisites or sign-up deadlines, for example), which participants cannot do. The option can be turned off, set to Sign-Ups only, Sign-Ups and Cancellation, or Sign-Ups and Cancellation with an email notification to the administrator when there is a cancellation. Even if the feature is disabled, the administrator can still perform the function if necessary. During a cancellation, the participant *always* receives an email notification, along with a confirmation code, to help in settling any disputes that

	may arise.
Researcher Reminder Email	Yes or No value indicating the *default* value when a new researcher account is created. If set to Yes, researchers will receive an email the day before they have studies scheduled, as a reminder. They will also be sent an email if they have any timeslots more than 2 days old that haven't been dealt with. Regardless of this setting, researchers may override the default setting individually, if they so desire.
Participant Display Order	The order that participants are displayed when researchers view a list of who has signed up for their study. Names can be ordered by first (given) name or last name (surname). If Anonymous ID codes are enabled, then researchers will not see names, in which case this setting would only apply to the administrator, since the administrator can always see participant names.
Phone Number Display	Yes or No value indicating if researchers and principal investigators can view the phone numbers of participants who have signed up for their study. If set to Yes, the phone number is displayed, if it is available.
Participant Identification	Determines how participants are identified to researchers. The options are by Full Name, by First Name only, or by a unique, system-assigned ID code. The last option ensures the highest level of privacy. The First Name only option is useful so researchers can identify and address participants, while still affording participants some level of privacy. See Participant Unique ID Codes for more information.
Pretest Viewing	Yes or No value indicating if researchers can view the results of an individual participant's pretest, if that participant has signed up for the researcher's study. This value only applies if online pretesting is enabled (see Online Pretests). If set to No, researchers cannot view any individual participant pretest results (though they can view aggregate results across all participants).
Pretest Aggregate Viewing	Yes or No value indicating whether researchers can view and analyze pretest responses for a chosen question across all participants. If enabled, researchers can also download the response data for the chosen question. Participant names are not included in this data, but responses may contain identifying information. This setting only applies if online pretesting is enabled.
Pretest Contact	Yes or No value indicating if researchers can contact a group of participants who meet a certain criteria, to

	invite them to participate any of their studies. The email contact is made through the system in such a manner that the participant's identity is not revealed to the researcher. Some schools are required to disable such a feature, as their IRB considers it coercion. This setting only applies if online pretesting is enabled and Pretest Aggregate Viewing is also enabled.
Pretest Contact Admin CC.	Yes or No value indicating if the administrator should receive a copy (by email) of any communications sent to participants by researchers, using the Pretest Contact feature. If set to Yes, an email will be sent to the administrator with the contact of the communication, which is useful if the administrator would like to monitor the content of such communications (generally to be sure there is no coercion). Only applies if the Online Pretesting and Pretest Contact settings are enabled.
Course Credit Reassignment	Yes or No value indicating if participants can reassign a credit from one course to another. This only applies if Course Credit Assignment is enabled, and a participant belongs to multiple courses.
Course Reassignment	Yes or No value indication if participants can change the course(s) they belong to after their account is initially created. Even if this setting is enabled, they cannot change the courses they belong to after they have earned credits.
Change Log Level	This feature is not yet implemented, and can be set to any numeric value (0 is recommended).
SMTP Relay Server Address	The hostname or IP address of your SMTP relay server. If you run the software on your own servers, your network administrator will have this information. It must be an "open" relay server. If Sona Systems runs your software, this is already taken care of.
Current Time	Set this value to reflect the current time at your organization. This is just a time zone adjustment. If Sona Systems runs your software, the time will adjust automatically during the Daylight Savings Time switch for the USA. If you are in an area that follows different Daylight Savings Time rules, please check this value on the first Sunday in April and the last Sunday in October, and adjust it accordingly.
Date Format	The format in which the system will display dates and times. Choose from either North American (July 14, 2001, 1:30 PM) or European (14 July 2001, 13:30) formats.
Compensation Type	Text to indicate the unit used when studies are offered

	for monetary compensation. Usually this is the name of your local currency (Dollars, Pounds, etc.).
Credit Type	Text to indicate the unit used when studies are offered for non-monetary compensation. Examples include “Credits” and “Points.”
License Key	Your 17-digit license key will be provided by Sona Systems. The expiration date will be listed. If your license key has expired or is invalid, then only Administrators may login to use the system, and all other users will be prevented from logging in.

Settings That May Only Be Changed when the System is Empty

The table below lists settings that should only be changed when there is no data in the system. It is *very important* that you do not change these settings while there is data in the system, or you may lose data and the system may not perform as expected. If you absolutely must change a setting, contact Sona Systems technical support *first* and they will help you make the necessary changes without a loss of data integrity.

Setting Name	Description
@ Suffix	The @ suffix (domain) for all usernames. The system can use user IDs that resemble email addresses. Most schools have an email system with unique email addresses, such as “username@yourschool.edu” (in this example, the @ suffix value is “yourschool.edu”). The intention here is that user IDs must be unique in the system, so using an organization’s unique email user ID convention is the best way of enforcing this uniqueness. User accounts on this system are *not* connected in any way to the university email system. See the User IDs section for more information on how user ID are handled. The value you supply should *not* include the leading “@”. If you do not have a common @ suffix (domain) to map it to, you can leave this blank. If you leave it blank, the system will allow users to choose any user ID, but will also require them to provide an email address so they can be contacted by the system when necessary.
Pretest Requirement	Are pretests required of participants before they may login? There are 4 options for this setting. If you do not deal with pretests, or you would not like the system to deal with pretests, then set the value to No Pretest.

	If you administer an off-line (paper) pretest, but you would like the system to enforce it, set the value to Yes, Pretest not administered on-line. In this case, you will need to indicate to the system that the participant has completed the pretest, before they may login. Pretest completion status can be set during approval of new users (see Participant Account Self-Creation), during a user import (see Importing Users), or by editing an individual account (see Adding and Editing Users). If you would like the system to administer a pretest online, you should set this value to one of the two Online Pretest options. If this setting is enabled but there is no active pretest in the system, participants will be allowed to login. On subsequent logins, if a pretest is now active and available, they will be sent to the online pretest. See Online Pretests for more information.
P.I. Support	Yes or No value indicating whether the P.I. (Principal Investigator) feature should be enabled. If enabled (set to Yes), you may create P.I. users, and a P.I. is required for every study. See Principal Investigator Accounts for more information.
Multiple Researcher Support	Yes or No value indicating if a study can have multiple researchers linked to it. If set to Yes, a study can have multiple researchers. Each researcher (for the study) has full and equal control over the study. If enabled, then Timeslot Usage Restrictions can be enabled only on a per-study (not per-researcher) basis.
Strict IRB Mode	Yes or No value indicating if the system should operate in strict IRB mode. If set to Yes, the system will operate in strict IRB mode, which requires that each study have an IRB approval code and expiration date, along with some other restrictions. See the Strict IRB Mode section of this documentation for more information.
Location Scheduling	Yes or No value indicating if the system should make the location (room/lab) scheduling feature available. If set to Yes, the feature is enabled and allows researchers to pull up a list of pre-defined locations and view the availability of those locations when scheduling timeslots. See the Location Scheduling section of this documentation for more information.
Maximum Credits	A numeric value indicating the maximum number of

	credits a participant may complete. A participant may still exceed this maximum value, if they have credit *requirements* that exceed the Maximum Credits value. Some organizations use this limit to prevent a participant from participating in too many studies and depriving other participants of participation opportunities. If this is not a concern, you may set it to a high number like 10 or 99. This value can be a fractional number with up to one decimal point of accuracy (e.g. 1.5 or 2.5).
Maximum Credit Enforcement Leniency	Yes or No value indicating if the system should be lenient when it enforces the maximum credit restriction. If set to Yes, the system will be lenient and allow a participant to exceed the maximum credit in *sign-ups* as long as they do not exceed it in *granted* credits. This situation may occur when a researcher has yet to credit a participant for a study a participant participated in, or a participant has signed up for more than one upcoming study (thus there are multiple credits they have yet to earn, but likely will earn in the future).
No-Show Penalty Credits	A numeric value indicating the number of penalty credits to assess when a participant does not show up for a study. If a researcher indicates a participant did not appear for a study, the participant will not receive credit for the study *and* the number of credits they must complete will be increased by this No-Show Penalty Credits value. You may set this to No Penalty, a fixed penalty amount, or a penalty amount that is a multiple value of the number of credits the missed study is worth. This value can be a fractional number with up to one decimal point of accuracy (e.g. 1.5 or 2.5) if it is set to a fixed penalty value. If set to a fixed penalty value, then no-shows will always be penalized the same amount. If set to a multiple value amount, it must be a whole number (1, 2, etc.), and the penalty is determined by multiplying this value by the study's credit value. For instance, if the multiple value is set to 2, and a participant earned a no-show on a 2.5 credit study, they would be assessed a 5 credit penalty (2.5 x 2).
Penalty Type	Indicates how penalties (if penalties are implemented in the system – see the No-Show Penalty Credits setting) are implemented. There are 2 options for this: penalties increase credit requirements and penalties are deducted

	from earnings. The penalties increase credit requirements option adds onto a participant's overall credit requirements when they earn a penalty. This option is useful especially when there is objection by an IRB to the other option, which effectively results in a deduction of earned credits. One potential drawback to this option is if the maximum credit earning potential should be limited (with the Maximum Credits system setting). The system will allow a participant to exceed the Maximum Credits setting if their own credit requirements are greater than the Maximum Credits value. So, if a participant earns a lot of penalties, it may result in a credit requirements value higher than the Maximum Credits value. If there is a reason for the Maximum Credits value to be so strict (generally to limit earning potential), then this penalty type option may not be ideal. The other penalty type will deduct from a participant's credit earnings. This may result in a negative earnings value. With either option, when a penalty is assessed, no credit is granted. The two penalty type options merely determine how the penalty is applied. This setting cannot be changed if there are any penalties in the system, other than those that were retained using participation history retention (see End-of-Semester Maintenance), as retained penalties have no penalty value. The reason this setting cannot be changed if there are outstanding penalties is that it would be impossible to determine which penalties were assessed under which penalty type, which is necessary information in the event a penalty is revoked.
Study Description Deactivation	Yes or No value indicating whether the description fields for a study should be turned off. If set to Yes, these fields will be turned off. This is typically done when it is not desirable for researchers to enter detailed information about their study.
Duplicate Study Sign-Up	Yes or No value indicating whether researchers can configure their studies such that participants can sign up for the study more than once (at different times. If set to Yes, researchers have the option of configuring it

	to allow duplicate sign-ups (but they may opt not to allow it). If set to No, researchers are never given such an option, and duplicate sign-ups are prohibited.
Passworded Studies	Yes or No value indicating whether researchers may setup studies that require a password (for the study itself) that a participant must know before they can sign up. If set to Yes, researchers have the option of setting a password for each of their studies (they may opt not to use this feature). If set to No, researchers are never given such an option, and passworded studies are not allowed.
Web Studies	Web study support may be turned off entirely, enabled for external studies only (web studies that are administered outside the system), or enabled for both external studies and online surveys administered by the system.
Pre-Requisite Feature	Yes or No value indicating whether studies may have pre-requisites and/or disqualifiers (a disqualifier is a study a participant must *not* have participated in in order to participate in a study). If set to Yes, researchers may choose as many pre-requisites and/or disqualifiers for their studies as they like (they may opt not to). If set to No, researchers are never given such an option, and pre-requisites and disqualifiers are not allowed.
Pre-Requisite Enforcement Leniency	Yes or No value indicating whether the system should be lenient in enforcing pre-requisites. If set to Yes, a participant may sign up for a study that has a pre-requisite, as long as they are *signed up* for the pre-requisite study also. If set to No, the system will be strict and a participant must have *received credit* for the pre-requisite study before they may sign up. An example where leniency might be useful is if on a Monday, a participant signs up for Study A for Wednesday, and they want to sign up for Study B for Friday. Study B has a pre-requisite of Study A. If this value is set to Yes, the participant is allowed to sign up for Study B because they are signed up for Study A. If the value is set to No, they cannot sign up for Study B until they have received credit for Study A (which will likely occur after they participate in Study A, on Wednesday).
Course Restriction Feature	Yes or No value indicating if the course restriction feature should be made available. If set to Yes, researchers can choose to limit participation in their

	studies to participants enrolled in specified courses. If a participant is not enrolled any of the specified courses, the study will not show up on the list of available studies. Such restrictions are particularly useful when the participants span a wide range of courses, and certain studies should be off-limits to participants who may have learned about the details of a certain type of research in their courses, such that their participation may affect the integrity of the research.
Timeslot Usage Restriction	This setting may be enabled so the system enforces restrictions on the number of experimental timeslot hours available. It can be restricted on a per-researcher basis (a researcher has a specified number of hours to allocate across all their studies), per-P.I. basis, or per-study basis (restrictions are linked to a specific study). Only one type of restriction may be chosen (system-wide). If Multiple Researchers per Study is enabled, then the per-researcher basis for restriction is not available. This feature may also be disabled entirely. The per-P.I. option may only be selected if P.I. support is enabled in the system. See the Timeslot Usage Limit section of this documentation for more information.
Timeslot Usage Restriction Default	A number indicating the default value for the maximum number of hours available for timeslots. This only applies if Timeslot Usage Restriction is enabled. This value is only used as the default value, and it may be overridden for an individual study/researcher/P.I., depending on which type of restrictions are in place. The value specified here is in hours, and must be a whole number (e.g. 10, 25, 37).
Multiple Course Support	Yes or No value indicating whether participants may belong to multiple courses. If set to Yes, participants may belong to multiple courses. If set to No, they may only belong to one course.
Course Credit Assignment	Yes or No value indicating whether participants can assign a study credit to a specific course. This is useful when the participant is in more than one course. If set to No, course credits are assigned directly to the participant and not associated with any course. This only applies when the Multiple Course Support value is set to Yes.
Multiple Course Requirements	If a participant belongs to more than one course (Multiple Course Support must be enabled), this setting determines what their credit requirements should be. Credits requirements are tied to individual courses. There are 3 options for how the system should compute

	their credit requirements: 1. The sum (total) value of credits for all the courses they are in. 2. The value of the lowest credit-value course they are in. 3. The value of the highest credit-value course they are in. This computation is made only when the participant record is created. If their course assignments change later, the requirements may need to be adjusted.
Participant Account Self-Creation	Yes or No value indicating whether participants may create their own accounts. See the Participant Account Self-Creation section for more information. If set to Yes, participants will see an option on the front page of the site where they may create their own accounts. If set to No, no such link or option will be available.
Student ID Deactivation	Yes or No value whether the Student (University) ID number should be disable from the system entirely. This only applies to participant (student) accounts. Often, this is disabled if such numbers map to a participant's SSN, and regulations (such as FERPA) prevent collection of such data.
Student ID Requirement	Yes or No value indicating whether participants must supply their Student (University) ID number when creating an account. This only applies if Participant Account Self-Creation is enabled, and Student ID Deactivation is set to No. If the Student ID Requirement setting is set to No, participants may still supply their Student (University) ID number, but they are not required to do so.
Student ID Duplicates	Yes or No value indication if the system will allow participants to create an account where the Student (University) ID is already in use by another participant in the system. If set to Yes, then duplicates are allowed. This setting only applies if Participant Account Self-Creation is set to Yes, and Student ID Deactivation is set to No.
Participant Account Alt. Email	Yes or No value indicating if participants can specify an alternate email address where they would like to receive email notifications from the system. If set to Yes, participants are allowed to specify an alternate email address. This setting does not apply if there is no @ Suffix configured in the system (see System Settings).

Regulatory Compliance

Introduction

This software complies with all major regulations governing human subject research and privacy of data stored online. The system complies with both HIPAA and Common Rule for customers in the United States. For customers in Canada, it complies with the Personal Information Protection and Electronic Documents Act as well as the Tri-Council Statement. For customers in the European Union or in countries that follow OECD rules, it complies with OECD privacy rules and the European Union Directive of Data Protection.

In most cases, your organization must comply with all human subject and privacy rules that apply in your country. You should consult with your organization's IRB for more information. Even if you are not required to comply, compliance is still a good idea, as protecting sensitive data is always a good thing. Compliance in the context of this system is as simple as reading the remaining paragraphs of this section (that apply to your organization) and following the guidelines contained therein. The remaining compliance issues involving software, privacy and electronic data storage are all handled automatically by the software. You should still consult with your IRB or organization to be sure there are no additional compliance rules you must follow outside of use of this software (the handling of demographic pretests administered on paper would be one example).

Some regulations (particularly the US HIPAA regulations) are focused primarily on health data. You may think the system does not store confidential health data (in HIPAA terms, it is called PHI -- Protected Health Information), but depending on how your organization uses the software, there may very well be confidential data in the system. Consider the case of a study that requires that a participant come from a family that has a history of mental illness. Merely knowing who signed up for that study is confidential because that type of information should not be revealed to the public. It may turn out that your organization does not engage in studies of such a nature, but even more benign situations, like a study that requires that participants be regular contact lens wearers, can be construed as confidential information. Organizations typically err on the side of caution given the criminal and civil penalties for violation of these types of regulations.

You should also give some though to the Unique ID Code feature (see Participant Unique ID Codes). In many cases, you must enable this feature to properly protect a participant's privacy.

Handling an Information Request

In many cases, a participant has a right to request a copy of all data stored about them by the system, and this request should be granted in a timely manner, free of charge.

If you receive such a request, first verify the identity of the requester. After this is done, go to Users | Add/Edit/Search, and print a copy of their record. This will contain all their signup data and other login data. If your system has online pretests enabled and they have participated in the pretest, you should also print a copy of their pretest results (a link is included on their user information page). After following these steps, you have complied with the regulations.

Data Handling and Security Guidelines

As an Administrator, you have access to every study and you can see who has signed up for those studies, as well as online pretest responses. Because of these privileges, you should follow these simple guidelines:

- Secure Your Account. Use a password that is difficult to guess. The most secure passwords contain a combination of letters and numbers, do not spell a real word, and are at least 8 characters long.
- Secure Your Work Area. If you are logged into the system and you leave your computer, you should logout of the system or use a password lock on your computer. Ask your network administrator for help with setting up a password lock.
- Handle Paper Documents Carefully. Any printouts from the system should be kept reasonably secure. Store them in desk drawer out of the public view. Documents you decide to discard should be shredded if possible.
- Secure Electronic Data Carefully. Data exported from the system (using the Data Export feature) should be securely stored. Ask your network administrator for assistance with properly securing this data.

Strict IRB Mode

The system can run in strict IRB mode, if configured as such in System Settings. In this mode, a study must have an IRB approval code and expiration date in order to be posted. The system does not check the format of the IRB approval code (since those may vary widely), but merely that some text was provided. So if the study is one that does not require IRB approval, it's acceptable to enter any text in this area.

The system will prevent any timeslots from being added which are to take place after the IRB expiration date. In addition, the study will be deactivated (participants will not be able to see it) on the expiration date. Only the administrator may extend the expiration date.

Human Subjects/Privacy Policy Acknowledgment

Researchers and Principal Investigators must acknowledge the Human Subjects and Privacy Policy (all on one page) once every 6 months, if the Researcher Human Subject Policy Acknowledgment setting is enabled (see System Settings).

Participants must also acknowledge the policy once every 6 months, if the Participant Human Subject Policy Acknowledgment setting is enabled (see System Settings).

When a user is shown the policy for acknowledgment, they will see standard, regulation-compliant wording that is included with the software. If you would like to supplement this with your organization’s own policy, you provide that policy through the Human Subject Policy URL setting (see System Settings).

The standard policy varies depending on the type of user that is viewing it, and is available for review at any time through a link labeled “Human Subjects Policy” at the bottom of every page (for users who are logged in).

If anonymous identification (see Participant Identification in System Settings) is enabled, participants will also see their numeric ID code on this page, and be notified that researchers know them only by this code.