Creating an online survey using Sona Systems

It is important that you read through all of these instructions
BEFORE starting to create your online study.

1. Log-in to Sona Systems using your NSID and password.

2. Click ‘Add new study.’ Fill in the blanks. Be sure to include your experiment number in brackets after your title.

3. Before clicking “Add this study” scroll down to view the other options.
   - Click “Yes -- online survey administered by the system”
   - You can click no beside “Should the Researcher receive an email notification when a participant signs up or cancels?” (this will prevent you from getting a full inbox)
   - Then click “add this study”

- If you need to restrict your study (e.g., if you want your study to only be visible to males), click “View/Modify Restrictions” once you have added your study. Then select the questions that apply to your restrictions, and click ‘set restrictions.” You can then select which type of participant you want (e.g., males), and ‘save changes.’

**** Given that the participant pool is used primarily as a means for students to increase course grades, it is only fair that everyone have equal access to the same number of studies. For this reason, we generally do not allow researchers to disqualify or restrict people based on demographic characteristics (i.e., “only women may participate in this study”). Instead, what we would prefer is that you write a clause in the description part of your study to the effect of: “For this study we are primarily interested in testing female participants. Males can participate for a credit but their data will be discarded before analysis.” This way, everyone technically has equal access. In this particular scenario, you may still have males participating in your study and while this may seem inconvenient, it is necessary to ensure everyone has equal access. For example, there was a disproportionate amount of studies in 2010/2011 which were directed at female participants. Any questions beyond this can be directed to the participant pool administrator.**

4. You are now ready to input your study questions. To do this, view your study by clicking “My studies”, then “Study info”, and then “Update Online Survey.”

5. Use the ‘Introductory text” box for your consent form. (You will then make it so that your first question will ask if they have read/understood and agree.) Include a line that asks participants to print a copy for their own records, or for them to contact you if they want a copy. It is also a good idea to post your consent form below the instructions provided by SONA systems.

6. Use the “Closing text” box for the debriefing form information. Again, it would be good to tell participants to print it or to contact you for a copy.

*** Here is when you specify if you want your *questions in a random order*. If you want them to always be in the same order for every person (think about counterbalancing), then select "no." If you want your questions randomized, click "Some sections in random order, some in specified order." This way, you can make sure your consent and debriefing forms are always at the beginning and end, respectively.**

7. Click "Save and continue." Now you can start adding in your questions. If you need to put two surveys online, you can copy sections from an existing survey by selecting that option (written in blue). Otherwise, just scroll down to the "add a new section" part.

8. The "Introductory Section Text" box is for instructions. If you have instructions that you need to come before a specific question, put them here. Do not put your actual question here. If you do not have instructions for that section, leave it blank, and select "Add section."

9. This is the screen where you enter in your first question (remember: your first question should be your consent question).

*** *"Abbreviated Question Name"* is very important. This is where you input the variable name you want for that question (e.g., quest1, gender). This makes exporting the data much easier, as you will be importing your data with variable names, instead of having to use a question key to find out which answer belongs to which question (especially if your survey is randomized). Assign your questions variable names, and keep track of them for easy reference later.**

10. You then select whether the question is a free-entry, multiple choice with one answer, or with multiple answers. Read the other options as well (e.g., horizontal vs vertical, numeric, etc.). These options are up to you.

*** It is extremely important that you select 'yes' for *"Can students decline to provide an answer for this question?"* Ethically, students must be able to skip questions. The only exception is for your first question, the consent form question. Participants must answer this question. If they happen to click 'no', you cannot use their data.**

*** It is also important to contemplate how you want your data to be exported from the system. If you want your responses to be downloaded as numbers (instead of as string characters), you should select 'yes' for "Are all choices numeric?". If you do not want the numbers to show to participants, you should click 'no' for "Display numeric value?". If you do not do this, you may have to do a 'find/replace' in SPSS for analysis.**

11. Click "Save changes."

12. If you want another question in this section, scroll down and click "add a question" at the bottom of the page. (If you only have one set of instructions for the entire survey, you can continue adding questions, and only have one section. Sections are included in case you have different instructions for different parts. If this is the case, click 'section list' (in blue ink) to add a new section.

*** See below for *codes* used when inputting your questions to format the text (e.g., to bold sections, etc.)**

13. Continue adding questions and sections until you have entered your entire survey.

*** If, at any time, you need to *edit your sections or your questions*, you can view your study, then click “Update online survey”, and “Edit questions and sections.” You can also use this option to set the order of your questions, unless you selected the option to make them random.**

14. Once you are finished entering in all of your questions, be sure to go to the Final Review page to finalize the survey and any changes you made to it. Read it carefully to make sure there are no mistakes.

15. If you are satisfied with your survey, click “Apply changes, make active.”

16. Contact the administrator to add your participant hours, and to make your study visible.

17. Once your hours have been added, you can add your timeslot. To do this, click “view/modify timeslots”. Then click “add a timeslot.” Because this is an online study, your timeslot is the last day you want participants to sign up. In other words, it is the last participation date you want. Be sure to type in the amount of participants you were approved for. You can view your timeslot anytime to see how many people have completed your survey. Participants are normally granted credit automatically by the system upon completion of the study. However if a participant withdraws you will receive an email informing you that action will need to be taken. Normally, if the participant withdraws after completing the demographic information and they have advanced to the study questions they are awarded a credit. If you have any questions about the most ethical way to deal with withdraws you should forward the email to the participant pool administrator. ****Please check this often to make sure people are getting their credits promptly.****

Important notes:

- To see what your survey will look like to participants, click “Edit questions and sections”, and then click “Preview section”. You will be shown a screen exactly the same as what the participants will see.

- Participants can withdraw from your study at any time. If they do, their data will be deleted.

- Be sure to click the option to allow participants to skip questions.

Question codes (html coding):

- To bold a section, insert before the text, and after the text you want bolded (do the same using an “i” for italics and “u” for underline)

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- To end a paragraph, for instance in your consent form, insert </p> at the end of the paragraph

- You could also enter <p> at the start of the new paragraph

Another suggestion:

*** This suggestion comes from a researcher who used the online survey tool last year: Consider how you want your data downloaded into SPSS. If you only want your responses as numbers, instead of the full text of the response, be sure to click “yes” to “Are all choices numeric?” and “no” to “Display numeric value?”**

- If you don’t set it up this way, you will have to recode each question before you analyze your data as every response will end up a string variable and will need to be recoded before it can be changed into a numeric one.

For example, if the question was "Do you smoke?", and the response options are yes and no, then enter the choices as:

1 Yes
2 No

Note: there should be just a number (no period or anything else), then one blank space, then the text. Only the choices' text (not numeric value) will be displayed to participants.

- When you go to download data, there is an option only to download the numeric responses (e.g. "1" instead of "1 Yes") for the data.

Exporting your data

Once your study is complete, you will have to export your data from the system. To do this, use the following steps:

- View your study, and click “Download Survey Responses”.
- Then follow the instructions provided on the website.
- Select to save the responses to a file. Be sure to select “all files” under the ‘save as type’. Also, when you enter in the file name, be sure to write .csv at the end. This will allow you to import the file into SPSS very easily.

* **If you have any *questions* at any time, feel free to contact me at cmc188@mail.usask.ca.**

If a student withdraws

When students have completed your survey, they will be granted credit automatically by the system. To comply with regulations, the participants are 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. A general rule is to grant participants credit if they completed all the demographic questions and withdrew upon seeing at least one of the experimental questions.

If you have any questions about whether a participant should receive credit or any other questions, please contact Colleen Cochran at cmc188@mail.usask.ca.