



商學研究所
RESEARCH INSTITUTE FOR BUSINESS
恒生管理學院
HANG SENG MANAGEMENT COLLEGE

SONA Systems



User Manual (For Participants)

HANG SENG MANAGEMENT COLLEGE

2018

Research Institute for Business

SONA Systems

User Manual (For Participants)

Table of Contents

HOW TO ACCESS SONA?.....	2
A) REQUESTING AN ACCOUNT	2
B) LOGGING IN	3
HOW TO VIEW STUDIES ON SONA?	4
HOW TO SIGN-UP FOR STUDIES?.....	5
A) SIGN-UP FOR STUDIES.....	5
B) CANCELLING SIGN-UP	7
C) TRACKING YOUR PROGRESS	9
FREQUENTLY ASKED QUESTIONS	10
REFERENCES.....	11

How to access SONA?

a) Requesting an Account

- Once you click the **Request Account**, you will be required to provide some basic information.
- After registration, you will receive a login password from the system via email.

The image shows two screenshots of the SONA system interface. The left screenshot displays the 'Request Account' button, which is highlighted with a red rectangle. A yellow arrow points from this button to the right screenshot, which shows the 'ACCOUNT INFORMATION' form. The form includes fields for First Name, Last Name, User ID, Email Address, Email Address (re-enter for verification), Student ID Number, and Telephone. A 'Request Account' button is located at the bottom of the form.

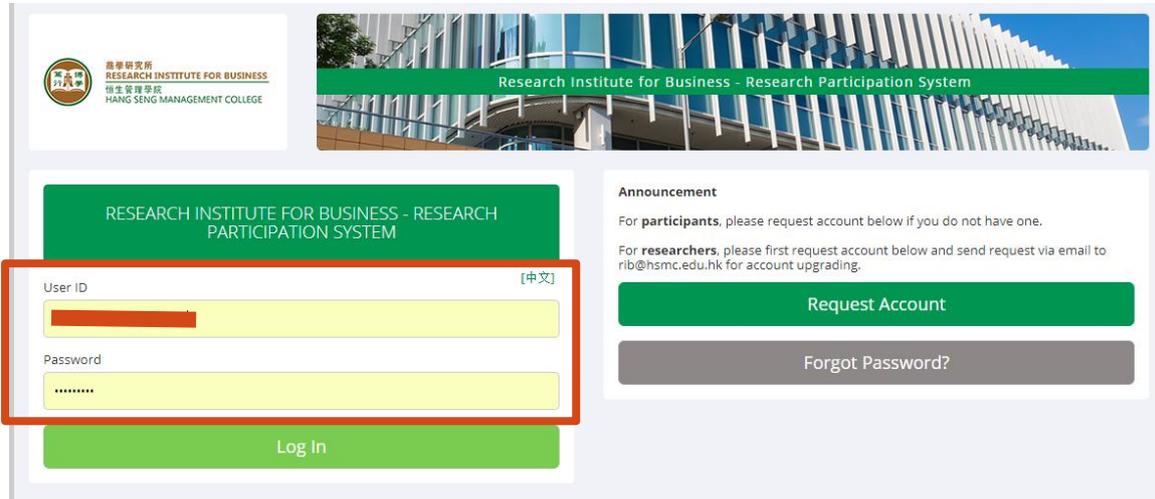
Figure 1 - Requesting an Account

If you did not receive your login information, please check your email program's junk mail folder before contacting rib@hsmc.edu.hk. One of the most common reasons for not receiving login information is that an email program misclassified the email as junk mail.

If you already have an account of another role, like a researcher account, then using this feature will add the participant role to your existing account.

b) Logging In

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



RESEARCH INSTITUTE FOR BUSINESS - RESEARCH PARTICIPATION SYSTEM

User ID [中文]

Password

Log In

Announcement

For **participants**, please request account below if you do not have one.

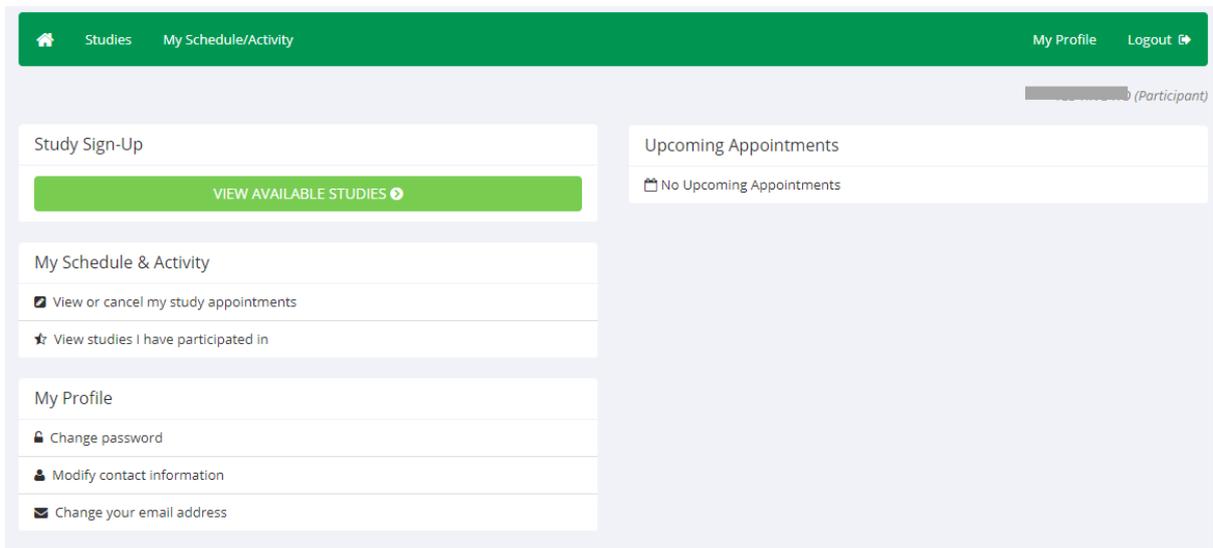
For **researchers**, please first request account below and send request via email to rib@hsmc.edu.hk for account upgrading.

Request Account

Forgot Password?

Figure 2 - Login Page

- You will be asked to fill in a prescreening questionnaire and change the password. After you complete these tasks, you will see the Main Menu.



Studies My Schedule/Activity My Profile Logout

(Participant)

Study Sign-Up

VIEW AVAILABLE STUDIES

My Schedule & Activity

View or cancel my study appointments

View studies I have participated in

My Profile

Change password

Modify contact information

Change your email address

Upcoming Appointments

No Upcoming Appointments

Figure 3 – Main Page

Your login session will expire after a certain period of inactivity, which is about 20 minutes. The system will warn you a few minutes before the expiration. This is done for security purposes. If this happens, you can always log in again. Once you are done using the system, it is better to fully log out, to prevent any problems that may arise if someone uses your computer before the session expires.

How to view studies on SONA?

- Click on **Studies** from the top toolbar and 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.

Currently Viewing: **All Studies**

View studies with available timeslots on :

Available?	Study Information	Eligibility
	External Survey Monkey (4 Credits) (Online Study)	
	Managing Costs When Abroad (1 Credits)	Invitation code required.
	Memorable Events in Life (1 Credits) This study focuses on events that have affected your life since.	
	Mobile vs Landline Study (1 Credits)	Invitation code required. Must be 18 or older. <u>Prior study restrictions</u>
<input checked="" type="checkbox"/> Timeslots Available	Pronunciation of Words (1 Credits) Study of word pronunciation	Invitation code required.
	Climate effects on happiness (1 Credits) brief description of the study	eligible if you like As <u>Prior study restrictions</u>
	Math Problems (0.5 Credits) (Online Study)	
	External Study Limesurvey (1 Credits) (Online Study)	
	Historical Events (1 Credits) (Online Study)	Invitation code required.
<input checked="" type="checkbox"/> Timeslots Available	Banana Split Study (1 Credits)	

Figure 4 - Viewing Studies

Studies that currently have vacancies (timeslots) will have “**TIMESLOTS AVAILABLE**” listed next to the name of the study. If none of the studies have available timeslots, you may want to log on 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.

How to sign-up for studies?

a) Sign-up for studies

- Click on the **study name** that you would like to participate in for more information. You may see a list of special restrictions or eligibility requirements, as well as the contact information for any queries.
- Once you have determined that 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**.

	Historical Events (1 Credits) (Online Study)	Invitation code required.
Timeslots Available	Banana Split Study (1 Credits)	

Study Information

Study Name	Banana Split Study
Study Type	 Standard (lab) study This is a standard lab study. To participate, sign up, and go to the specified location at the chosen time.
Credits	1 Credits
Duration	30 minutes
Description	Studying the ice creams.
Preparation	Get ready.
Website	View Study Website
Researcher	Hugo Finkelstein
Principal Investigator	Billy Falcon
Deadlines	Sign-Up: 24 hour(s) before the appointment Cancellation: 24 hour(s) before the appointment
	View Time Slots for This Study

Figure 5 - Study Information

Timeslots for Study

Date	Location	Sign Up?
Wednesday, September 23, 2015 3:00 PM - 3:30 PM	Greeves Hall 399	Sign Up
Sunday, October 18, 2015 2:00 PM - 2:30 PM	Johnson Building Basement	Sign Up
Thursday, November 5, 2015 2:30 PM - 3:00 PM	Student Lounge	Sign Up
Monday, November 16, 2015 3:00 PM - 3:30 PM	Johnson Building Basement	Sign Up

Figure 6 - Study Timeslots

- After you click Sign Up, you have to click on the **Sign Up** button again to confirm after viewing information about the time and location of the study you plan to participate in. Then, an email confirmation will be sent to you immediately. You have now signed up for the study.

System Message: You must click on the Sign Up button below to complete your sign-up. x

Confirm Sign-Up

Study Name	Testing 1
Date	2018-01-24 11:00 - 13:00
Location	HSMC
	

The study may have other restrictions listed as Eligibility Requirements, for example, “Left-handed people only”. You should only sign up for the study if you meet all the requirements. If you sign up for the study and you do not meet the requirements, you will not be able to participate even though you have signed up.

Some studies require a special password (known as an Invitation Code) to sign up and is marked as “Invitation code required”. The researcher should have given you the invitation code if you are invited. It is not the same as the password you use to log in to the system. You will need to enter the invitation code just before you click the “Sign Up” button to sign up for a timeslot.

b) Cancelling sign-up

- If you need to cancel a timeslot you have signed up for, you can do this from the My Schedule page. Choose the **My Schedule/Activity** option from the top toolbar.
- Find the study that you want to cancel from the list of studies that you have signed up for. Studies that you are allowed to cancel will have a Cancel button next to them.
- 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 that you have signed up for, due to pre-requisites and restrictions.
- Click **Yes** to cancel your sign-up, and the sign-up will be cancelled immediately.

The first screenshot shows the top navigation bar with 'My Schedule/Activity' highlighted in a red box. Below it, there are sections for 'Study Sign-Up' with a 'VIEW AVAILABLE STUDIES' button, and 'Upcoming Appointments' showing 'No Upcoming Appointments'. A yellow arrow points from the 'My Schedule/Activity' menu to the second screenshot.

The second screenshot shows a table of study signups. The 'Cancel?' column for the 'Testing 1' study has a 'Cancel?' button highlighted in a red box. A yellow arrow points from this button to the right.

Study	Time	Location	Credit Status	Comments	Cancel?
Testing 1	2018-01-24 11:00 - 13:00	HSMC	Awaiting action from researcher		Cancel?

System Message: Are you sure you want to cancel this sign-up?

Cancel Study Signup

IMPORTANT: You may cancel a study sign-up up to 24 hours before the study is scheduled to occur. If you decide to cancel, you will receive an email confirmation of the cancellation, for your records.

Study Name	Banana Split Study
Date	October 18, 2015 2:00 PM - 2:30 PM
Location	Johnson Building Basement
Preparation	Get ready.
Researcher	Hugo Finkelstein Email: joseph@joseph-orr.com
Principal Investigator	Billy Falcon

Would you like to cancel this sign-up?

Figure 7 - Sign-Up Cancellation

For cancelling, there is a time limit before the study is scheduled to occur. When it is be too late to cancel, the Cancel button will not be available. This restriction can be found by clicking on the study name and viewing the study details.

If the cancellation affects your ability to participate in another study you have signed up for, it is your responsibility to cancel the dependent study as well. The system will warn you but will not force you to cancel.

c) Tracking your progress

- You may track your progress at any time by choosing the **My Schedule/Activity** option from the top toolbar.
- You will see all the studies that you have signed up for, listed in chronological order. The status will be changed according to the progress of the studies. Studies that the researchers have confirmed your participation will be shown as 'participated'. Otherwise, the studies will be shown as 'Awaiting action from researcher'.

The screenshot shows the 'My Schedule/Activity' page. The top navigation bar is green and contains 'Studies', 'My Schedule/Activity' (highlighted with a red box), 'My Profile', and 'Logout'. Below the navigation bar, there are sections for 'Study Sign-Up' with a 'VIEW AVAILABLE STUDIES' button, 'Upcoming Appointments' showing 'No Upcoming Appointments', and 'My Schedule & Activity'. A yellow arrow points from the 'My Schedule & Activity' section to a detailed view of the 'Study Signups' table. The table has columns for Study, Time, Location, Credit Status, Comments, and Cancel?. The 'Credit Status' for 'Testing 1' is 'Awaiting action from researcher', which is circled in blue. A 'Cancel?' button is visible in the 'Cancel?' column.

Study	Time	Location	Credit Status	Comments	Cancel?
Testing 1	2018-01-24 11:00 - 13:00	HSMC	Awaiting action from researcher		Cancel?

Figure 8 - Viewing Your Progress

Frequently Asked Questions

- ❖ ***Immediately after I login and 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 may be not properly configured to accept cookies. You should turn on cookies in your web browser, try to use a different web browser (for example, switch to Firefox if you are currently using Internet Explorer), or try to use a different computer. Detailed instructions can be found if you go to the site and enter the URL “cookie_help.aspx” in place of “default.aspx” in the address bar of the browser, when you are on the front page of the site.

- ❖ ***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 (if any) of the study may see that you have signed up for a study, along with the site administrator. No other users, including other researchers or your instructor can see this information.

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

When you request an account, you are required to enter an email address. You will be asked to enter it twice to ensure that it is typed correctly. That is the only email address where all email notifications will be sent. In other words, no alternate email address option is available, and you are not allowed to change it. The only solution is to request account deletion and open another account with the new email address. You must sign up again for all the selected studies like a new user.

- ❖ ***I noticed that with some studies, I could 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, you may not be able to sign up for the studies that are listed as the disqualifier studies. You can sign up for the disqualifier studies if the disqualifier study will take place after the study with disqualifiers. You are also allowed to sign up if you have already participated in 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.

References

Sona Systems. (2014, October 30). *Sona Systems - Participants Tutorial Video*. Retrieved from <https://www.youtube.com/watch?v=1OnT2ZU6QQ>

Sona Systems, Ltd. (2017). *Master Documentation Set*. Retrieved from https://www.sona-systems.com/support/docs/ems_docs.pdf