



**Sona Systems, Ltd.**  
**Experiment Management System**

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**Master Documentation Set**  
**16 September 2019**

## **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. In cases where the administrator has access to features also available to the researcher/PI, the functionality is documented in the Researcher/PI section of the documentation. Only administrator-specific features are covered in the Administrator section of the documentation.

As a user of this software, you are granted the right to copy, modify, and distribute this documentation within your organization. You may not distribute it outside of your organization without prior written permission from Sona Systems, Ltd.

You are encouraged to modify this documentation to suit the needs of your organization. You will find that this documentation covers every feature of the software, while your organization may have chosen to disable certain features during 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 may not be enabled for them.

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## INSTRUCTOR DOCUMENTATION

### Introduction

The Experiment Management System is used for the scheduling and management of a research participant pool. As an instructor, your interaction with the system will be minimal, and hopefully painless. Your primary use of the system will be to check on the credit status of students (participants) in your courses. 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 all current versions of Internet Explorer, Firefox, Chrome, and Safari. It will work with other web browsers, and with older versions of the browsers noted above, however the layout may not be as clean. Using an older web browser will lose no functionality. Ask your IT department if you need help with installing or using a web browser. This documentation presumes 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

Your administrator will provide you with a username and password to log in to the site (if SSO is not enabled), 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, which are not appropriate for a researcher.

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 reset and a new password emailed to you. Once you log in, you will be presented with a Main Menu with a few options.

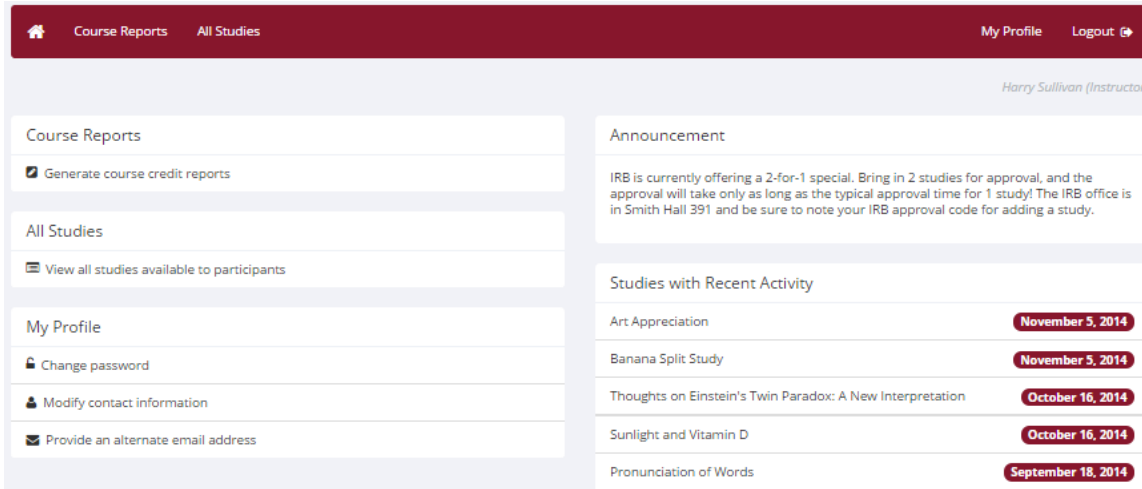


Figure 1 - Main Menu

## 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 that you are listed as an instructor for. You have the option to generate reports for each of those courses.

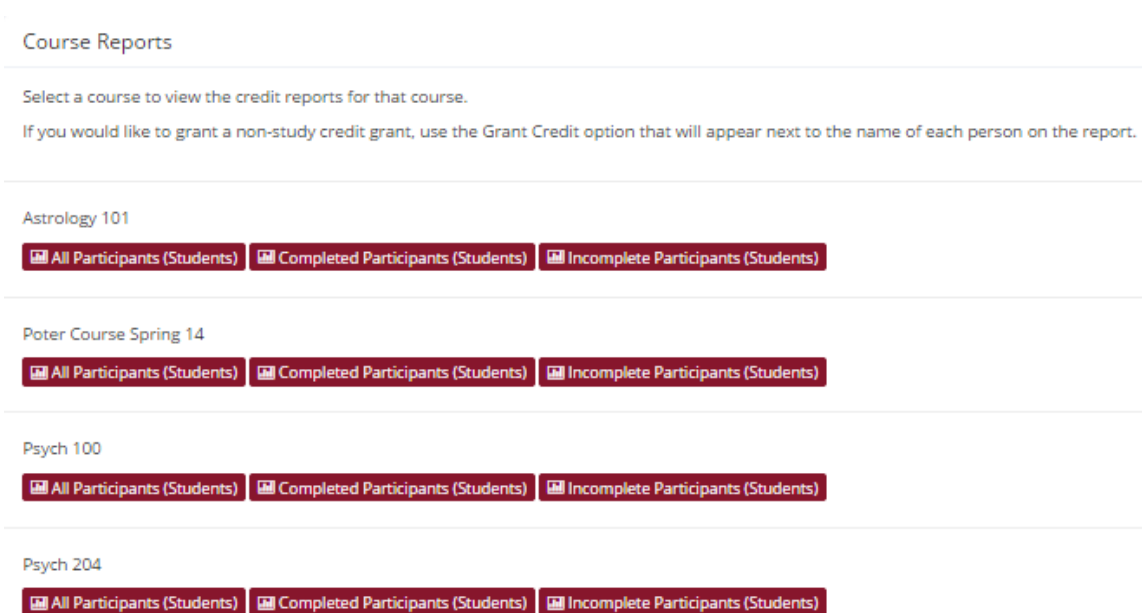


Figure 2 - Course Listing

You have three choices for the type of report you would like to generate. All Participants will list all the participants that are in the course. Completed Participants will list only the participants

who have met or exceeded their credit requirements. Incomplete Participants will list only the participants who have *not* met their credit requirements. Click the link for the desired report.

The report will be listed in alphabetical order by participants' last name. Participants that have not completed their requirements will be highlighted in bold. For privacy and ethics reasons, you will never see exactly which studies the students participated in. You will only see a summary of their credit earnings. If for some reason this information is needed, the administrator can produce such a report for you using the Course Credit History report available to them.

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 the report is too wide to be printed easily, you can use the Printer-Friendly format. A link to that will appear at the bottom of the report.

The report also includes a column indicating the Overall Unexcused No-Shows a participant has accrued. If you have a policy whereby you give some type of bonus for participants who do not accrue any unexcused no-shows, then use this column to determine which participants fit into that category (look for values of 0).

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. If you have a problem working with the CSV format file, please contact your IT department for assistance. CSV is a standard data format and they are quite familiar with it.

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. If you grant a credit by mistake and would like to delete it, please contact the administrator and they can do this for you.

Non-Study Credit Grant

You may grant a non-study credit to this participant (Richard Fish) by filling out the information below. Such a credit grant is often useful if the participant participated in a research alternative. To deduct credit, enter a negative value (e.g. ""-1"") for the number of Credits. You may enter partial values also (e.g. 0.25, 0.5, 1.5). You must enter a comment about the credit grant.

Number of Credits to Grant:

Comments

[Grant Credit](#)

**Figure 3 - Non-Study Credit Grant**

## Viewing Studies

In some cases, you may have the ability to view what studies are available in the system to participants. 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. 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.

All Active Inactive		
Sort by: Study Name Last Activity Date		
Study Information	Approved?	View
Art Appreciation (1 Credits) (Timeslots Available) colors in life	<a href="#">Approved</a>	• Study Info
Banana Split Study (1 Credits) (Timeslots Available)	<a href="#">Approved</a>	• Study Info
Climate effects on happiness (1 Credits) brief description of the study	<a href="#">Approved</a>	• Study Info
Environmental Engineering Test (1 Credits) (Timeslots Available) Skill testing.	<a href="#">Approved</a>	• Study Info
External Study Limesurvey (1 Credits) (Online Study)	<a href="#">Approved</a>	• Study Info
External Survey Monkey (4 Credits) (Online Study)	<a href="#">Approved</a>	• Study Info
Lack of Sleep (1 Credits) Does lack of sleep kill brain cells?	<a href="#">Approved</a>	• Study Info
Managing Costs When Abroad (1 Credits)	<a href="#">Approved</a>	• Study Info

**Figure 4 - Viewing Studies**

## Changing Your Password

To change your password or other information, choose the My Profile choice from the top toolbar.

If you change your password, please be sure to select a password you do not use on any other systems or websites, which is a good computing practice.

## My Profile

You may use this page to change your password and update other information about yourself. All fields are required unless marked otherwise.

Name	Harry Sullivan
User ID	hair @yourschool.edu
Alternate Email Address	<input type="text" value="harry@sullivanschool.edu"/>
Optional. If provided, all emails sent to you from the system will be sent to this address.	<input type="text" value="harry@sullivanschool.edu"/> (please enter twice for verification purposes)
Change Password	Enter your current password, then your new password twice, to change your password. Otherwise, leave blank. <input type="text"/> Current Password <input type="text"/> New Password <input type="text"/> New Password (confirm)
University ID Number (optional)	<input type="text"/>
Phone Number (optional)	<input type="text" value="202-555-2011"/>
Office (optional)	<input type="text"/>

**Figure 5 - Updating Your Profile**

Depending on how your system is configured, you may enter an email address on this page. You will be asked to enter it twice when changing the address, to ensure it is typed correctly.

## 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.