

Getting Started Guide

Helping administrators make the most out of Sona Systems' platform and services.



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- 3 **➤ Part 1: Getting Help from Us**
- 4 **➤ Part 2: Documentation**
- 5 **➤ Part 3: Backups**
- 6 **➤ Part 4: Sona Systems App for Apple and Android Devices**
- 6 **➤ Part 5: Invoices**
- 7 **➤ Part 6: Data Cleanup**
- 8 **➤ Part 7: Customer Communications**
- 8 **➤ Part 8: Integrations and API**
- 8 **➤ Part 9: Maintenance**



Welcome to Sona Systems

This guide is designed to teach administrators how they can get the best experience with Sona Systems. Topics range from end-of-term data clean up and backups, to invoicing and upgrades. Regardless of whether you're new to the system or have been using it for years, the topics below are useful and will save you time.



When troubleshooting or providing support, we prefer to communicate via email and so do our customers - over 95% of our support is handled this way.

► Part 1: Getting Help from Us

1. We're *always* here to help administrators. But, remember:

- Support is provided for *administrators only*. Researchers, instructors, and participants should contact you if they have any questions regarding the system or any policy-related questions.
- If a user has a question you're unable to answer, please pass it to us and we'll respond to you directly - this will ensure you have answers to this particular question if it arises again.

2. We handle support requests promptly as they come in. Please, make note:

- We work in shifts, most weekdays, and monitor email 20-22 hours per day, so even if you email us in the middle of the night, don't be surprised if you receive an immediate response.
- We spend considerable time assessing each question and prefer to provide detailed responses via email so you *and* our support team can easily refer to them later.

3. We communicate best through email and online support, so:

- Before you contact us, please be ready with as much detail about your question as possible. Insufficient details equates to longer support times. **For example:** if a participant can't sign up for a study, we need to know who the participant is, and which study it is they want to sign up for.
- The *easiest* way to reach us is by using the Contact Technical Support option when logged into your site as an administrator (this can be found under the **Administrator | Help and Documentation** section). When you contact us this way, we're able to see detailed system usage, diagnostic information, and the site URL the request came from.
- The *second easiest* way to reach us is by email at support@sona-systems.com. Please be sure to compose your inquiry with specific details and cite unordinary activity within the system.
- The *third easiest* way is by calling us at **800-775-3772 (North America)** and for international calls, dial **+1-202-360-4289 (International)**. Please speak your e-mail address if you reach our voicemail – our system will recognize and log it.

Part 2: Documentation

We provide comprehensive documentation, which can be found at:

www.sona-systems.com/support

(You have the option to download in either Adobe PDF or Microsoft Word format)

1. Items to remember about our documentation:

- You are free to use the Microsoft Word document to create documentation specific to your site.
- The documentation is broken into sections based on user type. This includes participant, researcher/PI, instructor, and administrator.
- Most of the documentation's 200 pages are for the administrator. Most of our customers find that participants don't need any documentation, and researchers only need it for setting up more complicated study configurations.
- "Release notes" is a list detailing updates to the software. To view, visit www.sona-systems.com/support



System Update Notices via Twitter

We regularly post updates on Twitter:

If you want to keep track of minor system updates, follow our customers-only Twitter account: **@SonaSystemsVIP**. If you request to follow us, send us a follow up email to notify us as well. And, be sure to follow **@SonaSystems** to learn more about us!

Customers-only Account: @SonaSystemsVIP

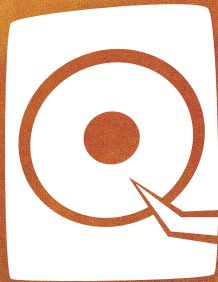
Public Twitter Account: @SonaSystems

➤ Part 3: Backups

1. Mistakes inevitably happen. And, when they do, we're here to help. Here are some key pointers to remember about backups:

- If you make a mistake – take a deep breath and keep calm. Site backups happen once per day, usually in the early morning.
- We keep 7 consecutive days worth of backups and archival backups from the beginning of each month for each of the last 3-6 months of service.
- We cannot perform a restore to retrieve *specific* data at *specific* moments in time. Our restore is a snapshot of your entire site at the time the backup was made.
- Since we cannot perform a restore to retrieve data at specific moments in time, any activity in the system since the backup was made will be lost, so users may need to repeat those tasks.

Backups are stored in two locations



One backup is kept in the same data center as your site.



The other is kept in a data center in another city in case of an unexpected facility failure.

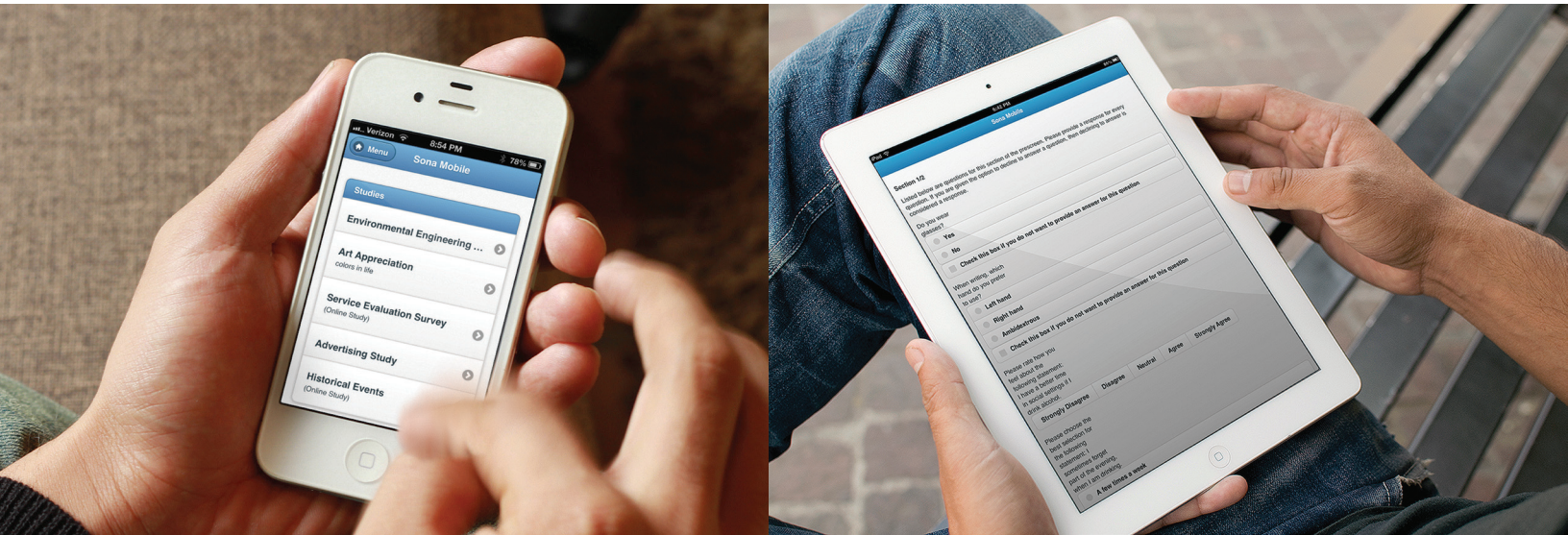
Do you like research as much as we do? Did you know we love conferences?

We regularly attend, and many times sponsor, several conferences throughout the year. Stop by our booth at SPSP, APS, or any many other annual events across the globe, and say Hello!

Visit our page www.sona-systems.com/events.aspx to see our schedule.

➤ Part 4: Sona Systems App for Apple and Android Devices

Did you know we have a mobile app? It's for *participants only*, and is free for iOS (iPhone and iPad) and Android devices. It's available from <http://www.sona-systems.com/app-download.aspx> or by searching for "Sona Mobile" on the relevant app store and downloading!



➤ Part 5: Invoices

1. Sona Systems is provided as an annual subscription and charged as either *limited* or *unlimited* sessions. Keep in mind, invoices are sent by email just a few weeks before your site is up for renewal. Therefore:

- To ensure service is uninterrupted, please provide us with a specific person who handles invoices. We'll need their name and email address. If this person changes, please notify us immediately.
- If you are the administrator, you will receive an electronic copy of the invoice by email as well. Please keep it on file in case a new administrator takes over.

2. Payment

- We do *not* require a Purchase Order. If your university does, we can send a quote in advance of the invoice so that a PO can be generated. We will then place this PO number on the invoice when we send it.
- We accept payments by credit card (through *PayPal*), check, and wire transfer. Information regarding these options is included in the invoice.
- Once we receive payment, you'll receive an email from us so you know it's been taken care of.

🔗 Part 6: Data Cleanup

1. Start of semester

At the start of each semester, you'll want to be sure you've done end of semester maintenance to clean up or remove data from past terms. Additionally, you'll want to perform a data clean up (see below). Here are some tasks to get you ready for the start of each semester:

1. **Update/Add/Delete Courses in Set Up | Course Listings**, especially credit requirements and the list of courses.
2. **Add new users of various types.**
3. **Change deadline dates in Set Up | System Settings**, like Study Scheduling Deadline and Participant Progress Display.
4. **Update any announcements in Tasks | Mass Email and Announcements | Update System Text**, and also any FAQ items.

2. End of semester

At the end of each semester, you'll want to run all necessary reports. We recommend storing a separate local copy of these reports in your files for reference. Some IRBs require this data to be kept for a certain number of years. We recommend running the following:

- **System Summary Report** – gives a summary of overall pool usage.
- **Course Credit History Report** – for IRB archiving purposes.

Once you're done, perform any additional end of year maintenance tasks or data cleanups to prepare for the upcoming term. If you do not, it is possible participants can use a credit earned from *past* semesters in the *upcoming* semester.

3. Data cleanup

Data is stored in the system and requires cleanup from time-to-time. Be sure to perform annual clean ups to prevent your site from slowing down. There are a number of items you should know in maintaining optimal site performance:

- Keep the number of studies to fewer than 300.
- Keep prescreen and online survey responses to under 400,000 total.
- You can monitor data usage by running a System Summary Report.
- If you encounter errors due to large amounts of data, we can help you identify data that can be deleted.

After doing end of semester cleanup (below), we recommend deleting and removing data from the following areas

1. **Studies | View All Studies | Batch Study Delete.** You can see studies and when they last had activity, and choose which ones to delete.
2. **Set Up | Course Listings.** You can delete old courses from here.
3. **Tasks | System Maintenance and Data Management | End of Semester Maintenance.** The Idle Deletion options let you delete users who haven't logged into the system for a number of years. You can also delete researchers who have no studies - which is likely to be many - after doing Batch Study Deletion.

All upgrades are free, happen automatically, and are applied to your site during the night in your region. Your site is typically unavailable for 1-2 minutes during the update. When we add major new features to the system, we announce this by email and include release notes. You can view them at www.sona-systems.com/support.

➤ Part 7: Customer Communications

1. When you'll hear from us

We have **3 records on file** for **(2) administrators** and **(1) invoice contact**. Payment related emails will be sent to the invoice contact. Correspondence will go to the administrator. Correspondences to the administrator include notification of maintenance, upgrades, reminders, and other important information.

2. When to notify us

If the points of contact change, please notify us as soon as possible.

3. System tracking

In the case of a “he said, she said” situation, we can help resolve conflicts between users. If a participant claims that a researcher has canceled their sign-up, and the researcher claims that he/she didn't do it, we can take appropriate action, such as viewing and providing email server logs to assess system activity, or track emails being sent from the system. We'll audit unique email tracking codes to determine if the email's content was altered.

➤ Part 8: Integrations and API

1. Online survey integration

Our product integrates with many popular survey tools, including *SurveyMonkey*, *Qualtrics*, *LimeSurvey*, *SurveyGizmo*, *FluidSurveys*, and *Inquisit*. Participants can instantly receive credits on Sona Systems when they complete a survey on a third-party site. To get started, visit <http://www.sona-systems.com/help/default.aspx>

2. Application Programming Interface (API)

With advanced programming skills, our API can be used to write custom applications which access data in the system. For example, you could write an application to get a list of studies running that day, and display them on an announcement screen in the department lobby. More information is available on the support site.

➤ Part 9: Maintenance

1. Outages and scheduled maintenance

We share a data facility with companies like *Amazon* and *eBay*. Multiple Internet feeds, power feeds, and battery backups feed our servers and keep your site up and running. Therefore, if you cannot access your site, chances are that it's most likely on your end.

If you feel that the issue is on our end, feel free to contact us. We employ a third-party monitoring service for all servers and are notified immediately to arising issues. We recommend you follow our customers-only Twitter feed **@SonaSystemsVIP** to get updates regarding possible issues.

Maintenance is performed once a month. It is scheduled overnight in your region between midnight and 5AM (low-usage time) and commonly on a Friday or Saturday. Downtime takes approximately 10 minutes. Major maintenance is scheduled between December 25th – January 1st and announced well in advance.