Learn How to Create a Study in Sensostudy

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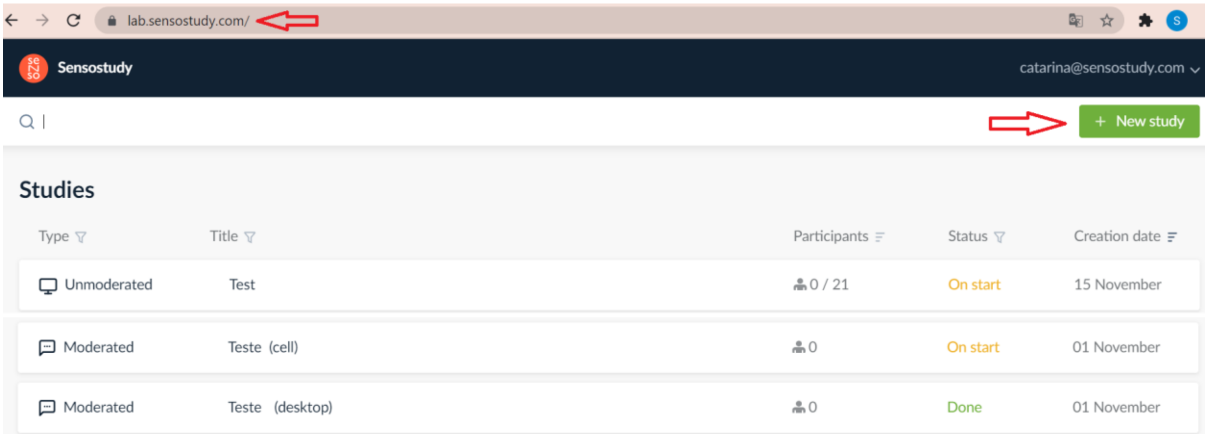
Personal Account

Accessing your account

Sensostudy is a cloud based service, which means you can access it anytime from any device. You can log in into your Sensostudy account using your username and password at: https://lab.sensostudy.com/

Once logged in, you will get your personal workspace, from which you can create new studies, edit and copy the existing ones, delete them and view the results.



Studies listed in the workspace may have different statutes depending on their state:

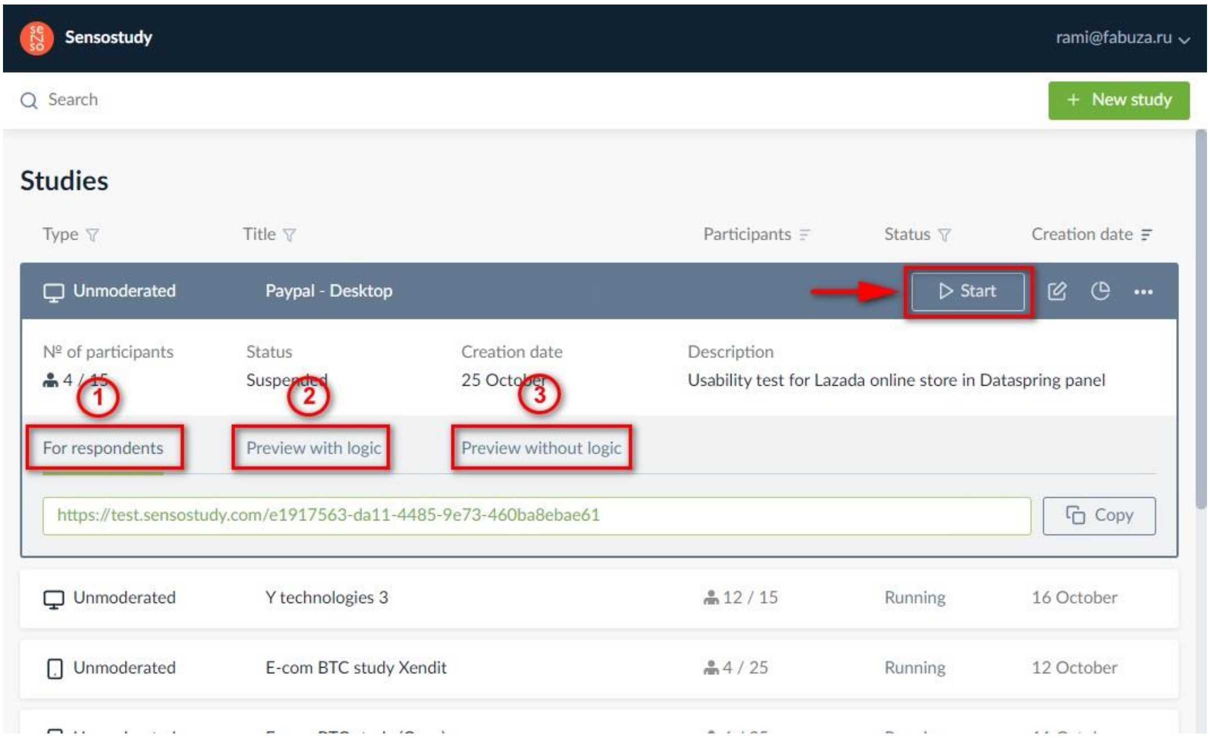
On start - a study has been created, but if a respondent follows the link, he will get a message saying the test is stopped.

Running - a study is running. In this state all the results passed by respondents are recorded and can be accessed in the report.

Suspended - a study has been started, but for some reasons someone had to stop it. If a respondent follows the link, he will get a message saying the study is stopped.

Done - a study has been completed, the required number of respondents has been reached.

Previewing the studies



Once you click on the name of the study the area will be expanded from which you can copy the three types of links (please refer to the screenshot above):

For respondents - this link is designed for respondents. You should share it with people who are going to participate in the study. Before sharing the link, make sure that the study is **Running**, if not just click on the **Start** button as shown on the screenshot above. All the results will be recorded according to the study settings.

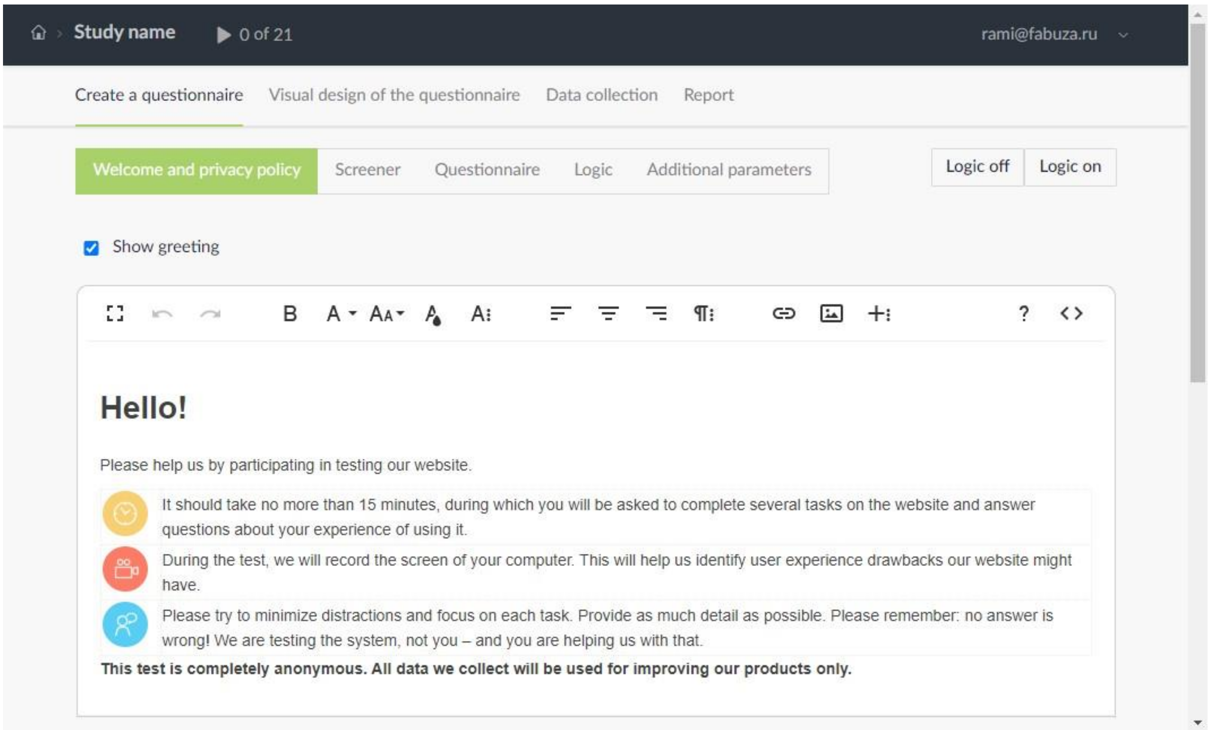
Preview with logic and **Preview without logic** types of links are typically used for previewing your studies without actually recording the results.

The difference between them is that when you are **previewing with logic,** it will include all the rules and screeners you set up in the study. In this mode you can make sure that the task logic is set up correctly, screener qualifies users according to the settings and other rules work smoothly.

Respectively, the **Preview without logic** works vice versa, any settings set up to disqualify users or skip tasks are disabled. It is important to use this type of preview when you need to check the whole study and go through all tasks. If you do not know how the study is set up, you should always use this type of preview - it will allow you to review every task.

Creating studies

Create a questionnaire



In the study editing mode under the **Create a questionnaire** tab you can find 5 more tabs available with different settings additionally to more common study settings above:

- **Welcome and privacy policy**
- **Screener**
- **Questionnaire**
- **Logic**
- **Additional parameters**

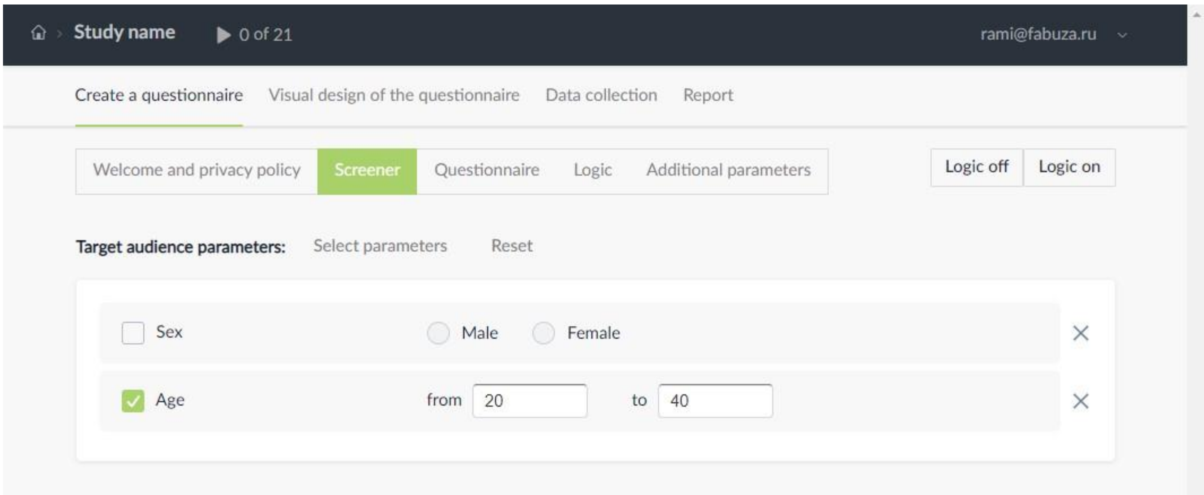
When creating a new study, it is usually set up step-by step from left to right. To change the study name just click on it in the top left corner.

Welcome and privacy policy tab

In this tab you can control whether the greeting and/or privacy policy is displayed to your respondents when they join the study and you can also edit its contents.

Screener tab

Under the **Screener** tab you can add some demographic questions that depending on how you set them up will either just record responses or screen out the participants. To enable screening out just add a question, check it and select the value which should qualify or disqualify them.



Based on the example above the system will collect the gender of participants and screen out anyone who is less than 20 and more than 40 years old.

To add additional questions just click **Select parameters** and choose questions you want to include.

Questionnaire tab

When you've finished setting up the **Welcome message**, the **Privacy policy** and the **Screener**, you can begin creating the study scenario, i.e. adding tasks.

You can add as many tasks as needed in any sequence, the respondents will get the tasks in the same order they are displayed in the edit mode unless the logic is set up to skip tasks depending on certain criteria.

Here is how the questionnaire toolbar looks like:

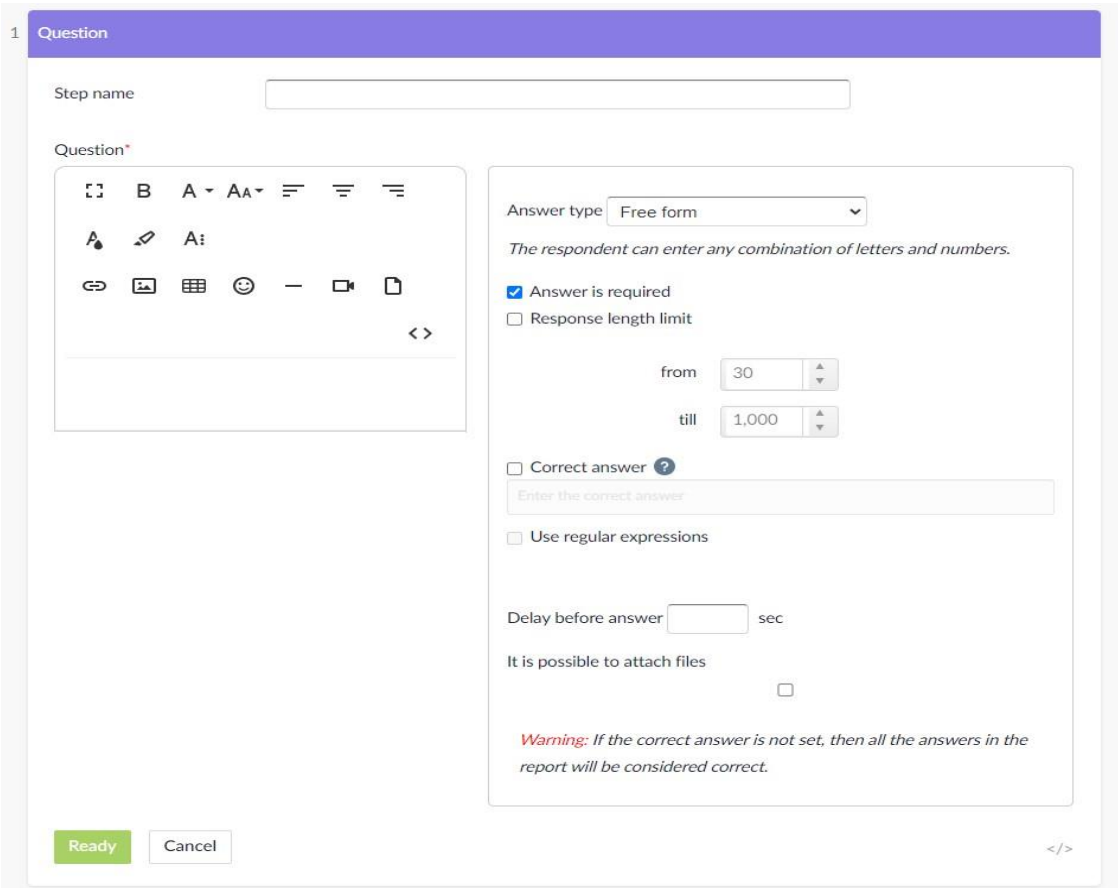
To add a new task just click on one of the task types, e.g. **Question**, and you will get the new step settings.

New step

Please review what types of tasks are available for your studies.

Question

This type of task is generally used when you want to get certain information from your respondents.

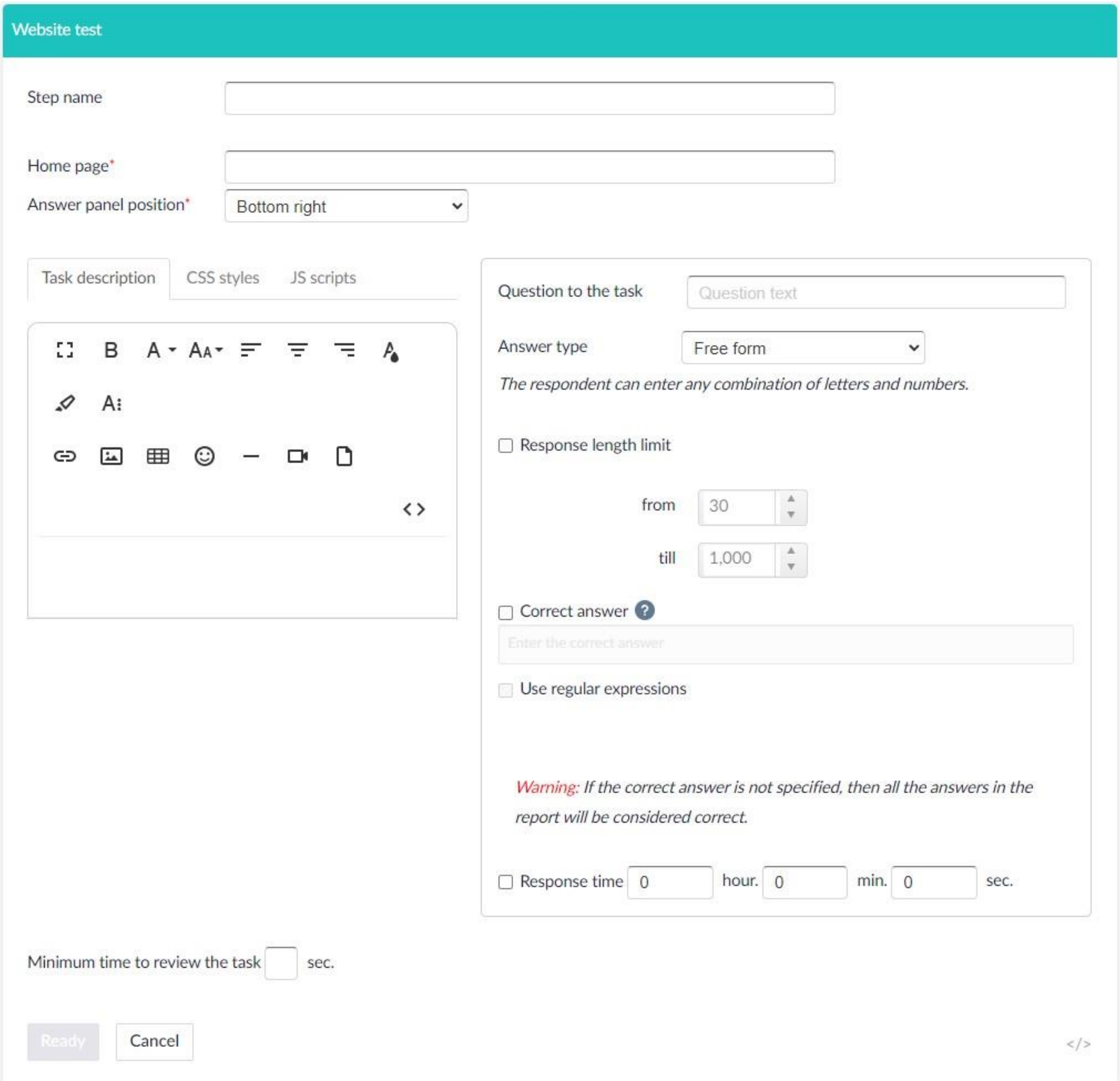


- **Step name** - used internally, won't be shown to respondents
- **Question** - here you can add your question along with images, videos, links, etc.
- **Answer type** - control how the respondents should provide their answer
  - **Free form** - any input the length of which is controlled by **Response length limit**
  - **Choose from options** - can be **only one answer** OR **multiple answers**
  - **In a specified format** - can be numeric, currency, percentage or date
- **Answer is required** - respondent won't be able to skip the question
- **Response length limit** - limit the length of the input (both *min* and *max*)
- **Correct answer** - later it would help you to analyze results or you can screen out respondents based on their input compared to the correct answer
  - **Use regular expressions** - if a response is provided in a free form, using regular expressions you can check if it contains specific words and treat it as correct
- **Delay before the answer** - used to bring respondents' attention to the task
- **It is possible to attach files** - in some certain cases you may need your respondents to attach a file to check if they completed the task, for example if the task was to find and download some specific document on your website

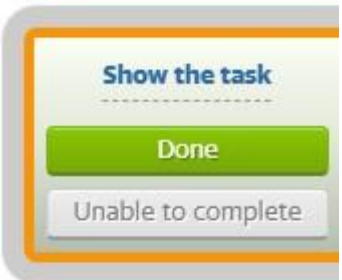
Website test

Website test allows you to observe how respondents interact with your website or prototype and how they perform tasks there.

This is how **Website test** looks in edit mode:



- **Step name** - used internally, won't be shown to respondents
- **Home page** - add a URL to the website or prototype you want to check; this is where the task will begin
- **Answer panel position** - using this panel the respondent can view the task, skip or complete it. You can place it in any corner of the page.



- **Task description** - describe what your respondents should do
- **Minimum time to review the task** - used to bring respondents' attention to the task
- **Answer type** - there are mainly two types of answers which are shown to respondents once they complete the task.
    - **Free form**, **Choose from options**, **In a specified format** - respondents are required to enter their answer in one of three selected formats
        - **Question for the task** - the actual question which you can ask after the website task completion
    - **Follow a link** - the result of task will be recorded as a URL where respondent completes the task
    - **Correct task completion link** - if you set a success link and the respondent completes the task being on that link the system will automatically treat it as successful, which would help you to analyze the results of the study
- **Response time** - you can limit the time a respondent can spend completing the task

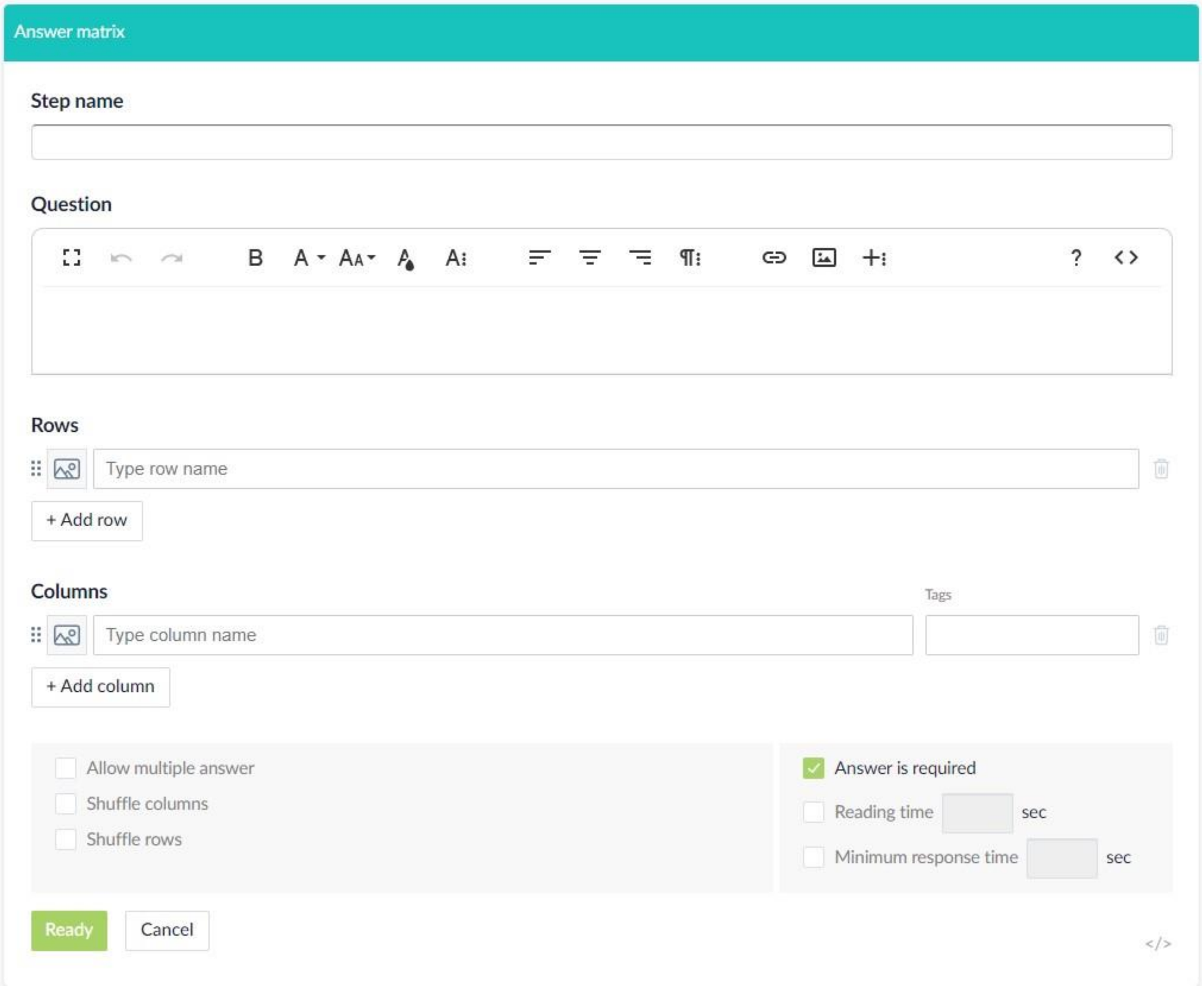
It is important to know that the **Website test** can be completed in two ways:

- **Manually** - the respondent takes all the steps according to the task description, click **I am done** and answers the question if it was set up.
- **Automatically** - the study completes automatically ones the respondent makes a certain action, e.g. clicks on a specific link or visits a specific page. This can be enabled by adding some JavaScript code.

Answer matrix

Matrix questions are used as a way to ask one or multiple questions about a similar idea when there is a scale involved. You can use them for mini-surveys on their own, or as a single question with a scale. Matrix questions great for customer experience surveys, system usability scale surveys, etc. This can be helpful for doing quantitative research.

This is how the **Answer matrix** looks in edit mode:



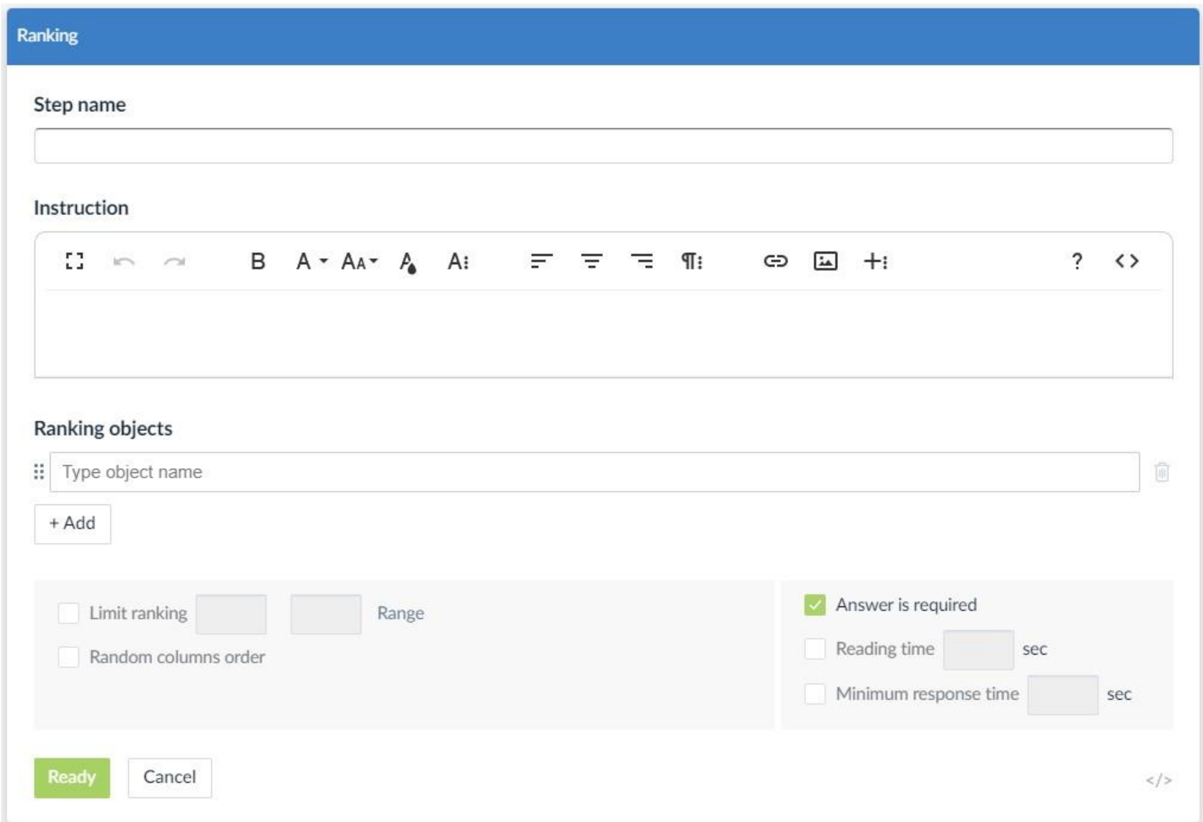
- **Step name** - used internally, won’t be shown to respondents
- **Question** - here you can add your question along with images, videos, links, etc.
- **Rows** - add a statement that you want your respondents to rate

- **Columns** - the number of columns represent the number of points the scale is o **Tags** - using tags you can convert text responses to numerical values. Let's say you added 5 rows which means you have a 5-point scale like *Fully disagree*, ..., *Fully agree*. You can assign a numerical value to each of the choices, for example *1* to *Fully disagree* and *5* to *Fully agree* and the system will automatically calculate the results of the survey based on the assigned values.

Ranking

The goal of this type of task is to let respondents range the provided options in the order of preference.

This is how the **Ranking** questions looks in edit mode:

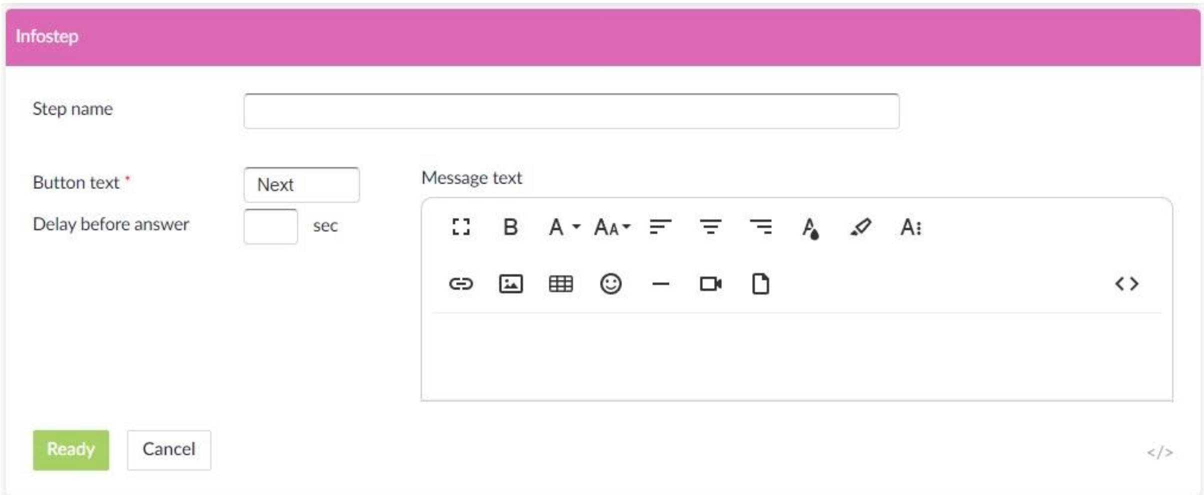


- **Step name** - used internally, won't be shown to respondents
- **Instruction** - here you can add your question along with images, videos, links, etc.
- **Ranking objects** - values that you would like your respondents to range (words, slogans, sentences, etc.)

Infostep

Use **Infosteps** when you want to provide your respondents with some additional information (e.g. instructions, or caution). It is also mostly used between the tasks to get the respondents prepared for the next steps.

This is how the **Infostep** looks in edit mode:

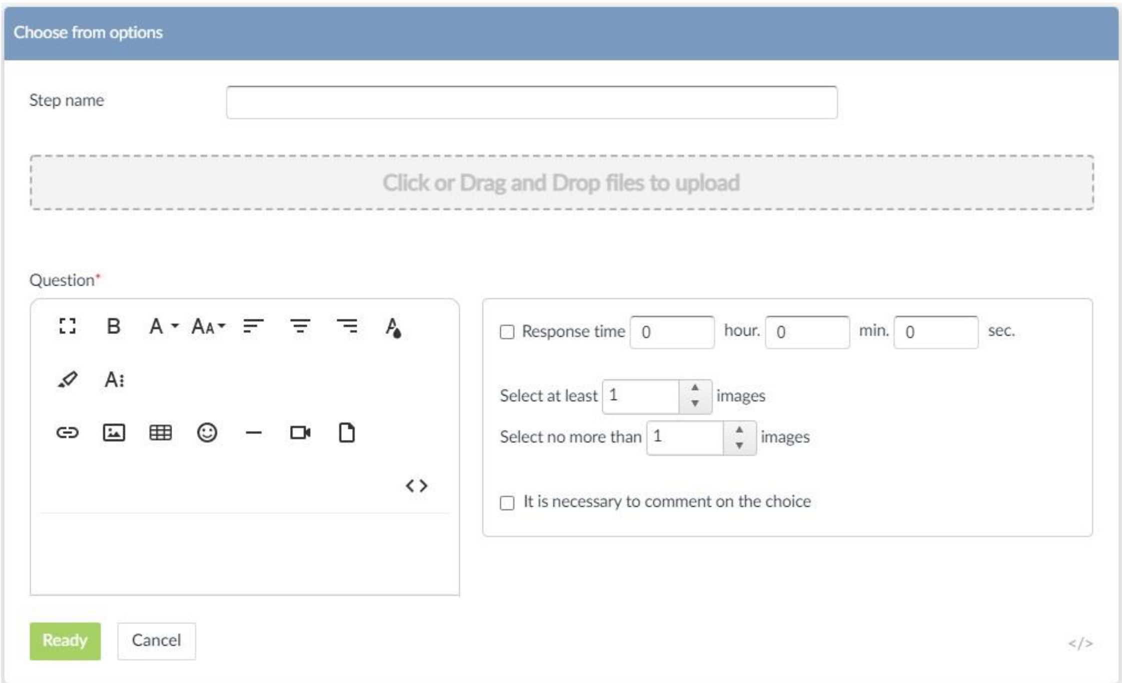


- **Step name** - used internally, won't be shown to respondents
- **Button text** - customize the caption of the button which will take the respondent to the next task
- **Message text** - the actual message you want to bring your respondents' attention to
- **Delay before answer** - make sure the respondent won't skip the **Infostep** by setting a delay before the **Next** button is available.

Choose from options

Here you can let your respondents choose the image they prefer the most. They are being shown the images you add to the task, then they must select the one or multiple ones they like the most and provide the comment on why they made that choice.

This is how the **Choose from options** task looks in edit mode:



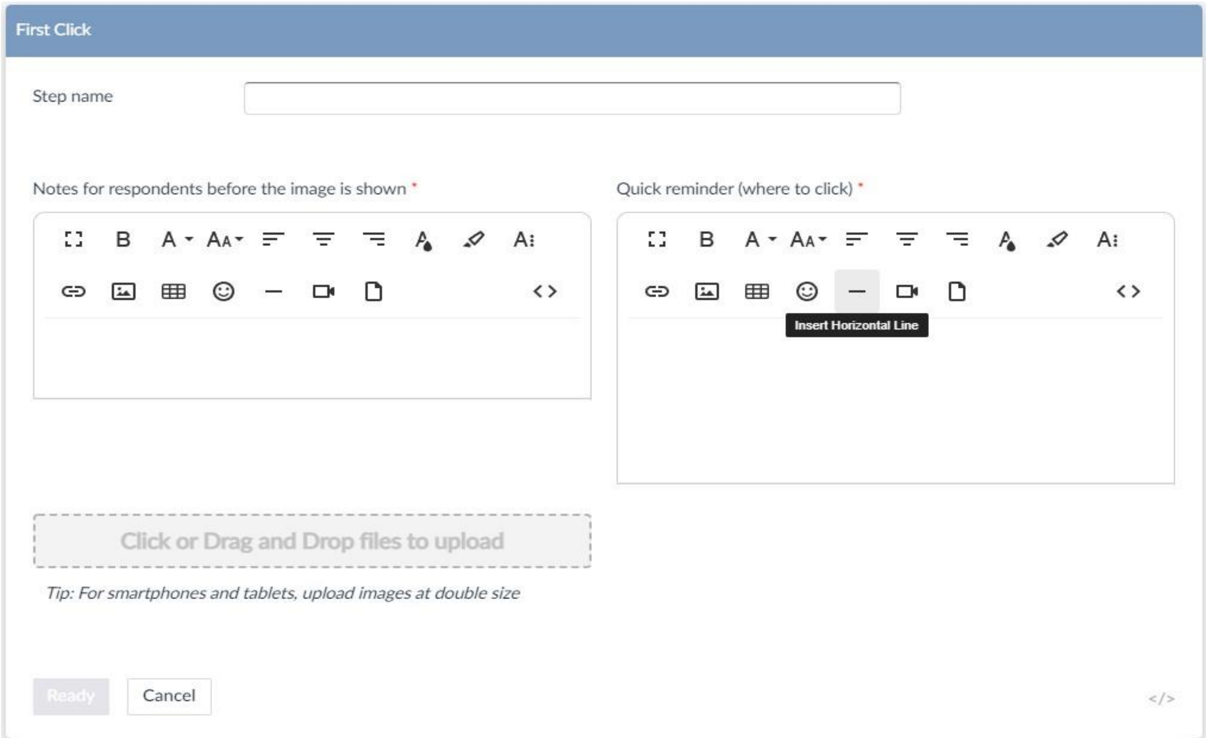
- **Click or Drag and Drop files to upload** - used to upload the images, or you can simply click on that area to browse files on your computer
- **Questions** - here you can add the task along with images, videos, links, etc.

Additionally, you can limit the response time, allow selecting multiple images or limit the number of images that can be selected, and require respondents to comment their choice.

First click

When you want to find out where the respondent will click on to find a certain information you can do the **First click** testing. They will be shown an image and asked to click on the area where they think they could find the requested information. It is commonly used for first impression testing. In the results of the study you will get a heat map with a number of clicks on each area.

This is how the **First click** task looks in edit mode:

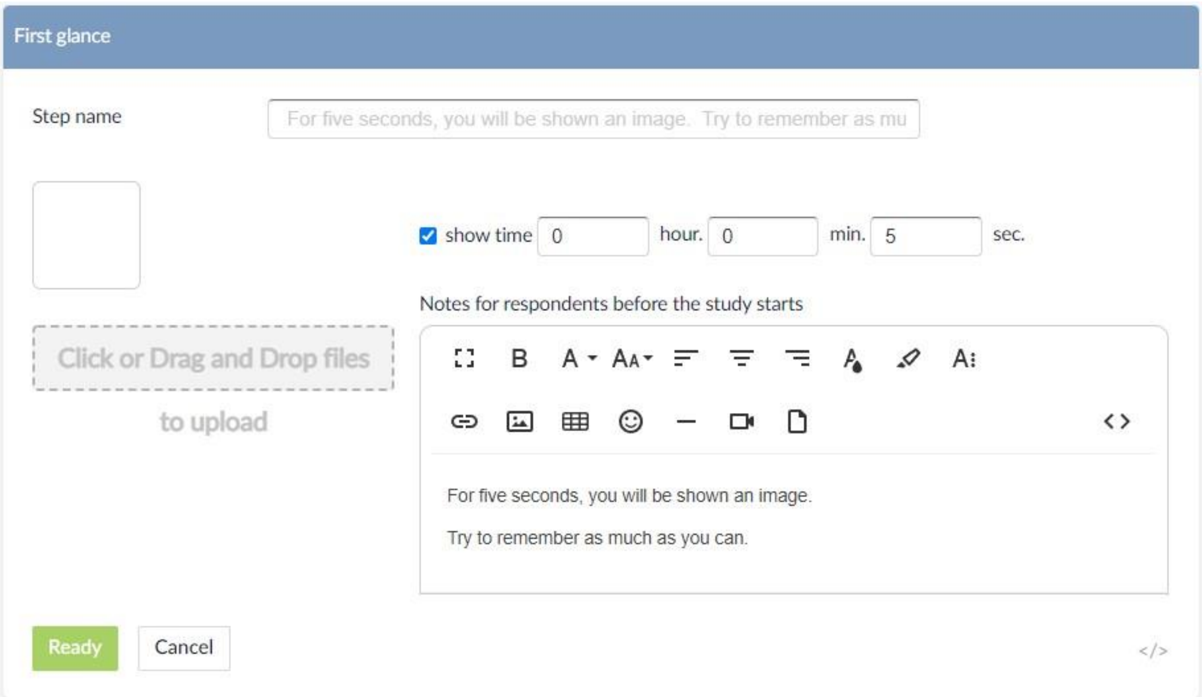


- **Step name** - used internally, won't be shown to respondents
- **Notes for respondents before the image is shown** - here you can add the task description which will be displayed, respondents won't see the image yet
- **Quick reminder (where to click)** - this reminder will be shown along with the image where the respondents are supposed to click
- **Click or Drag and Drop files to upload** - used to upload the images, or you can simply click on that area to browse files on your computer. Once uploaded just select the area(s) which you would like the system to consider as correct.

First glance

The **First glance** task helps to reveal what will your respondents notice the most in the first 5 (can be adjusted) seconds after seeing the image of your website, or design, or advertisement. We inform respondents that they will be shown an image for a specific amount of time (usually 5-7 seconds) and ask them to remember as much as possible. To get their feedback you can add the **Question** task right after the **First glance** asking what they have remembered.

This is how the **First glance** task looks in edit mode:



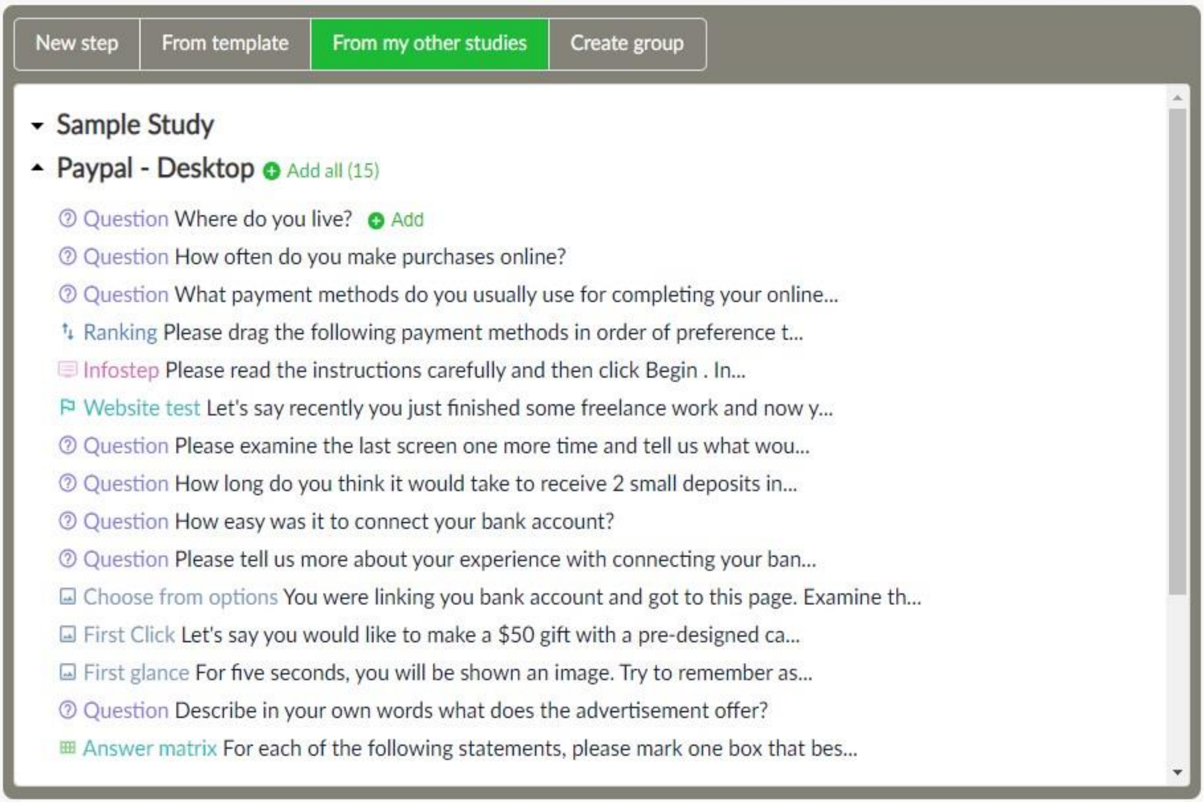
- **Step name** - used internally, won't be shown to respondents
- **Notes for respondents before the study starts** - here you can add the task description, respondents won't see the image yet
- **Click or Drag and Drop files to upload** - used to upload the images, or you can simply click on that area to browse files on your computer

Desktop test

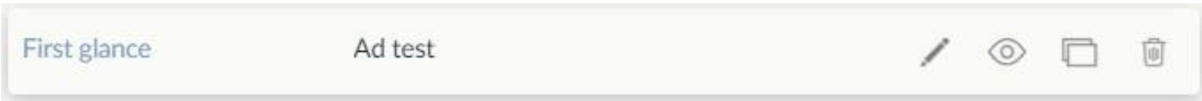
Using the **Desktop test** type of task, you can check how respondents interact with applications beyond the internet browser. For example, it is possible to observe what users do with downloaded files, or work with CRM installed locally on their computers, etc.

From my other studies

If you already have other studies available in your workspace and want to reuse the questions from them, it is possible to import as the whole questionnaire from another study as a single task. Just hover your mouse pointer over the study name and click **Add all** or put it in front of the task to add import only one task.



Task control panel



Once you hover your mouse pointer over any of task in the questionnaire or just click on it you will get some controls that allow to:

- edit the task

- preview study beginning from this task as a respondent.

Please note, the order of next questions will be the same if you previewed the study with logic, i.e. if you set up to skip certain questions they will be skipped in this preview.

- duplicate the task along with all settings

- remove the task

Changing the order of tasks

You can change the order of tasks simply by dragging them up and down.

Logic tab

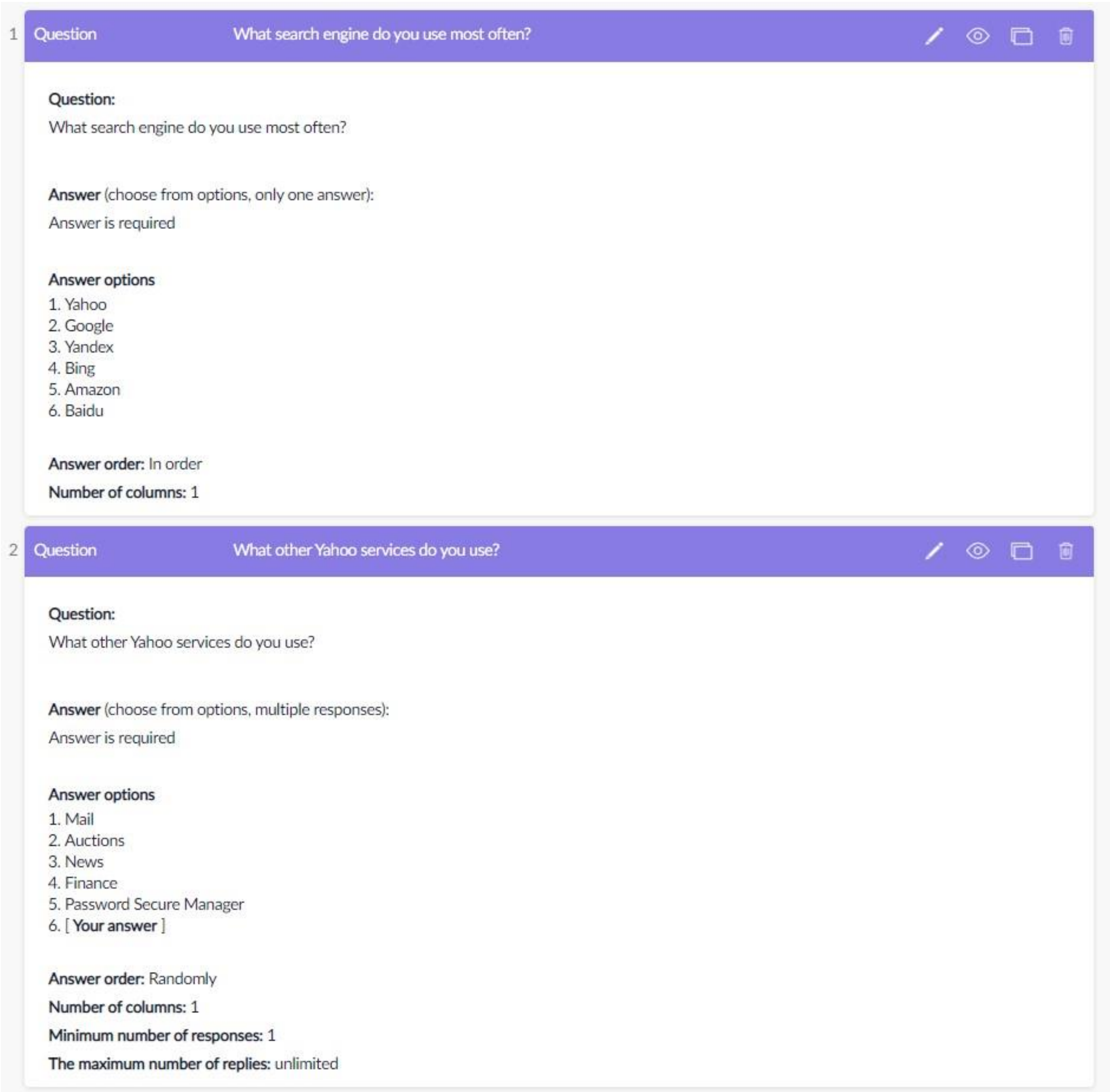
If you've finished setting up the **Questionnaire**, now you can proceed to creating rules under the **Logic** tab, which will allow you to set up the study so the tasks are skipped depending on respondents' choices. Rules are based on conditions, for example, "If the answer to Task #1 was *'Yellow'* then we skip *Task #2* and get to *Task #3*, if the answer was *'Black'* we proceed to *Task #2*".

Logic is mostly used in the following cases:

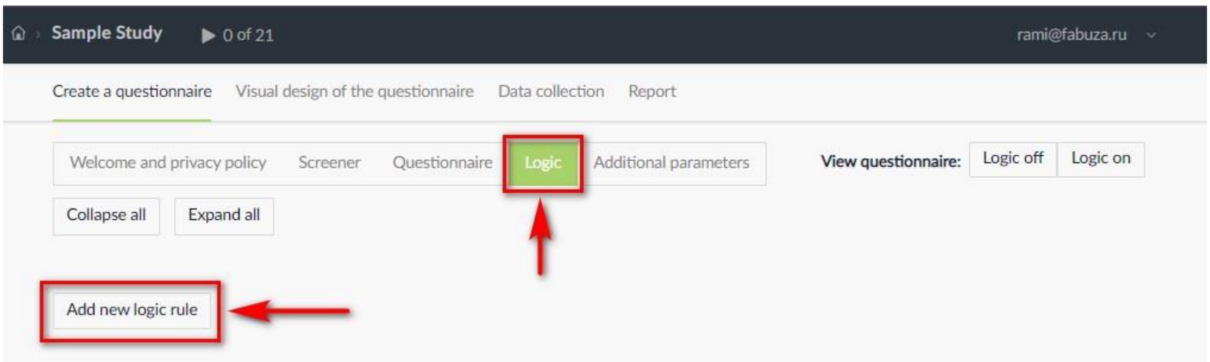
- When you need to distribute respondents to different task flows based on certain attributes (for example, we need 50% of respondents to be male and more 50% to be female)
- When your study contains tasks and questions that are designated to certain respondents only (for example, if a respondent selected *'Yes'* we need to ask a clarifying question. Another example, when you need 50% of respondents take one task flow and more 50% the another one)

Let's try to create a rule so you have a better understanding of how it works. Let's say you added a **Question** task, where respondents have to choose what search engine they use most often, one of the options would be *'Yahoo'*. So what you want to do next, if they've chosen *'Yahoo'*, is to get to another task and ask what other services of *'Yahoo'* do they use (weather, news, auctions, etc.).

So now you have two questions in your study and want to set up the logic, so the *Task #2* is shown only to those respondents who selected *'Yahoo'* in *Task #1.*

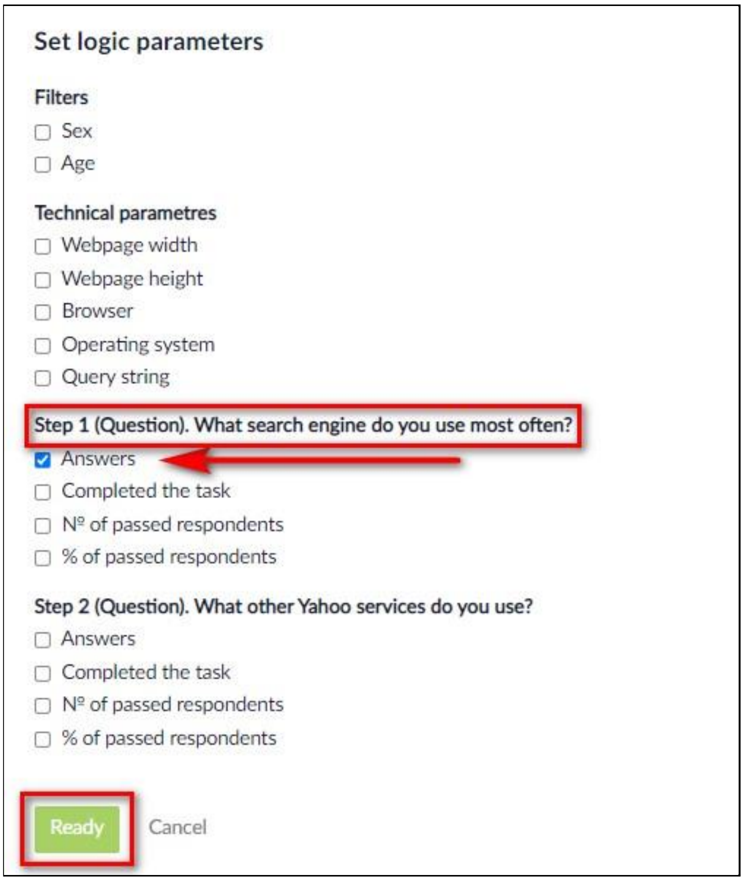


Start by going to the **Logic** tab on the top secondary menu and click **Add new logic rule**:

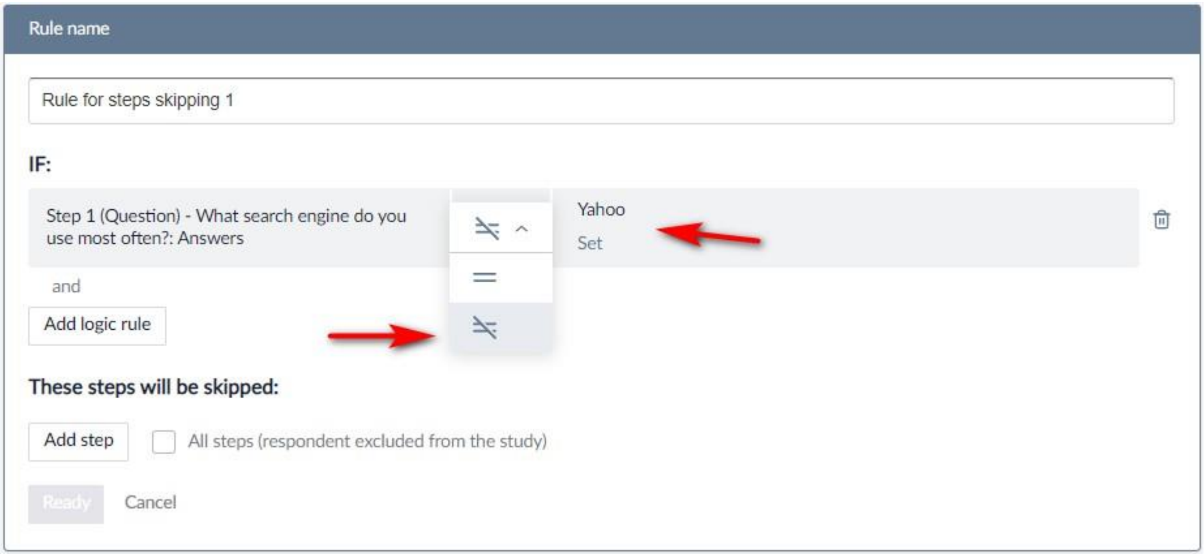


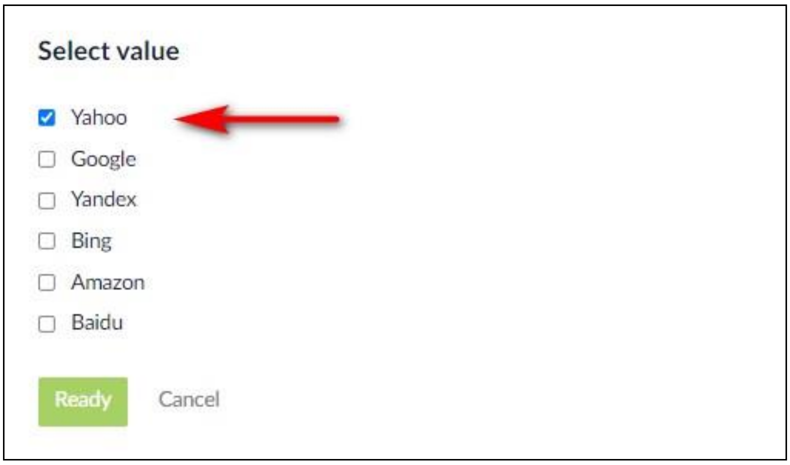
Next you will see the rule creation menu:

- **Rule name** (first field) - enter any name you want, just to make it easier to remember
- **IF: Add logic rule** - now you should select a criteria based on which further you can select steps to be skipped. Click on the **Add logic rule** button to get the available criteria options, such as questions from the screener (e.g. gender, age, etc.), some technical parameters (e.g. browser, operating system, etc.) and tasks from the questionnaire. Since you want the rule to be based on how users responded, select **Answers** for *Step 1* and click **Ready**.

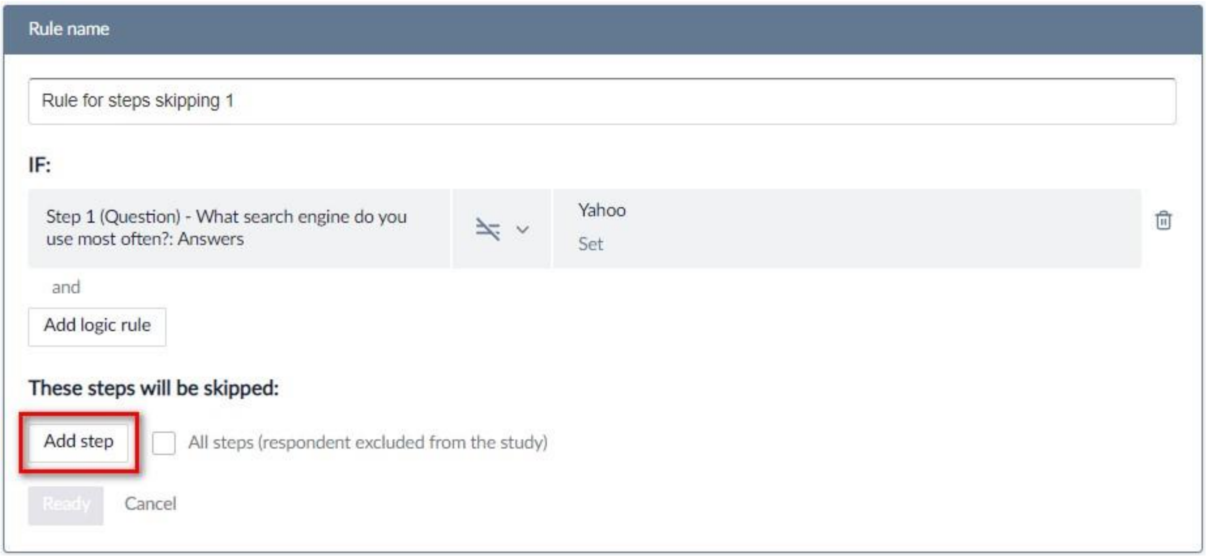


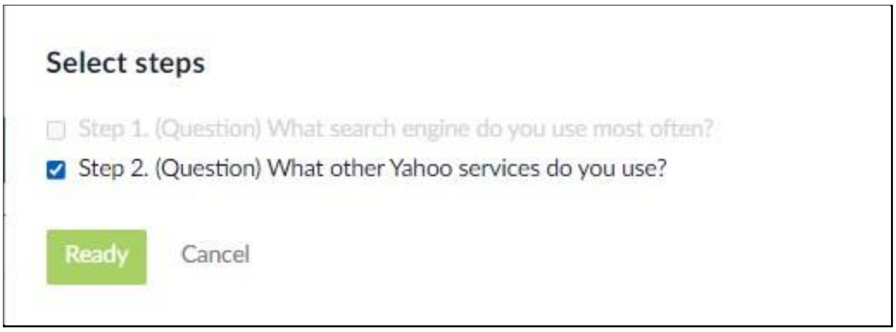
- Now you have to set up when exactly the rule should be activated in your study. We want to set it as follows - **If** *in Step #1 answer* **IS NOT EQUAL** *to 'Yahoo'* **SKIP** *Step #2*
- So on this screen we select **NOT EQUAL**, click **Set,** select *'Yahoo'* and click **Ready** the popup window.





- So, we have set up the condition **IF** and now we have to add steps to be skipped if the condition was met. Click **Add step**, select the questions you want to skip in the popup window and click **Ready**.



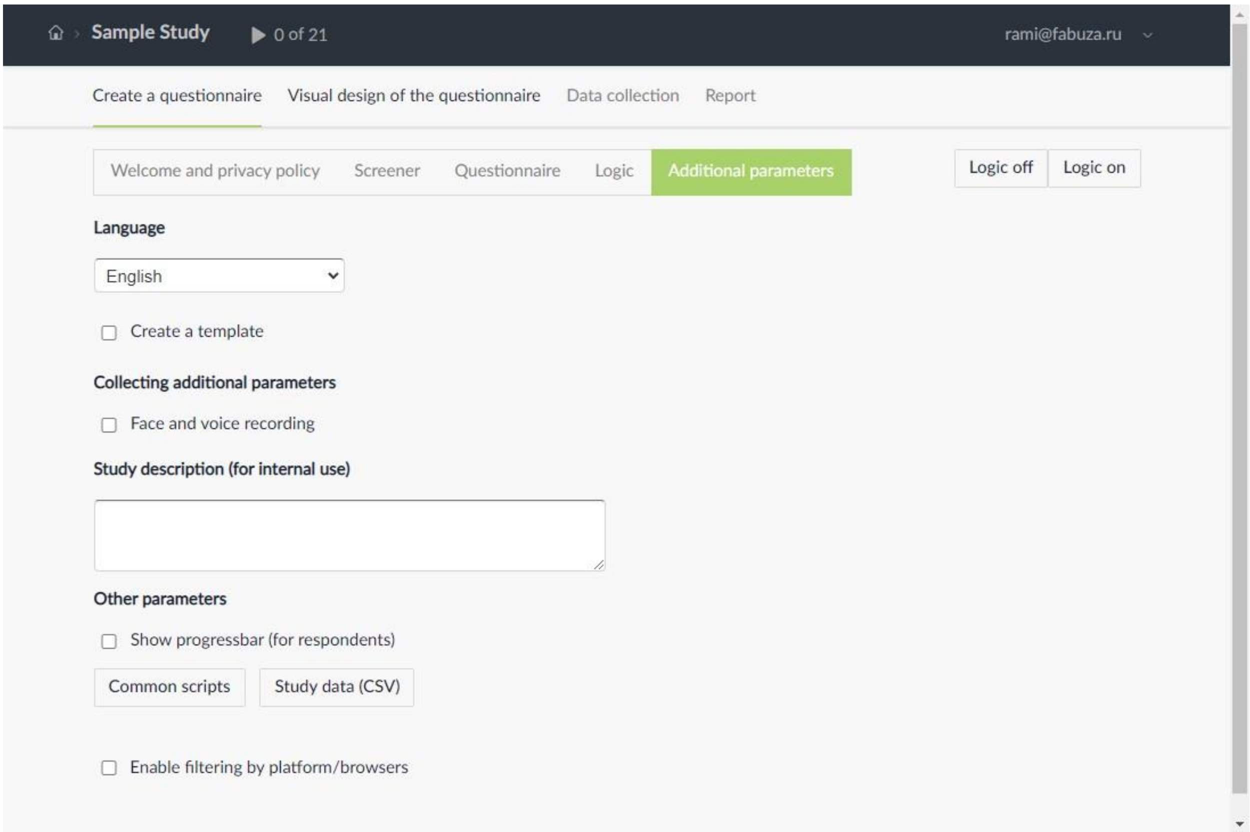


- That's it! You've just created the rule that will skip *Task #2* about different Yahoo services for respondents who didn't choose *Yahoo* search engine in *Task #1*.

There are many other cases that can be dealt with **Logic** which are described in another manual.

Additional parameters

Under the **Additional parameters** you can control some extra settings of your study.

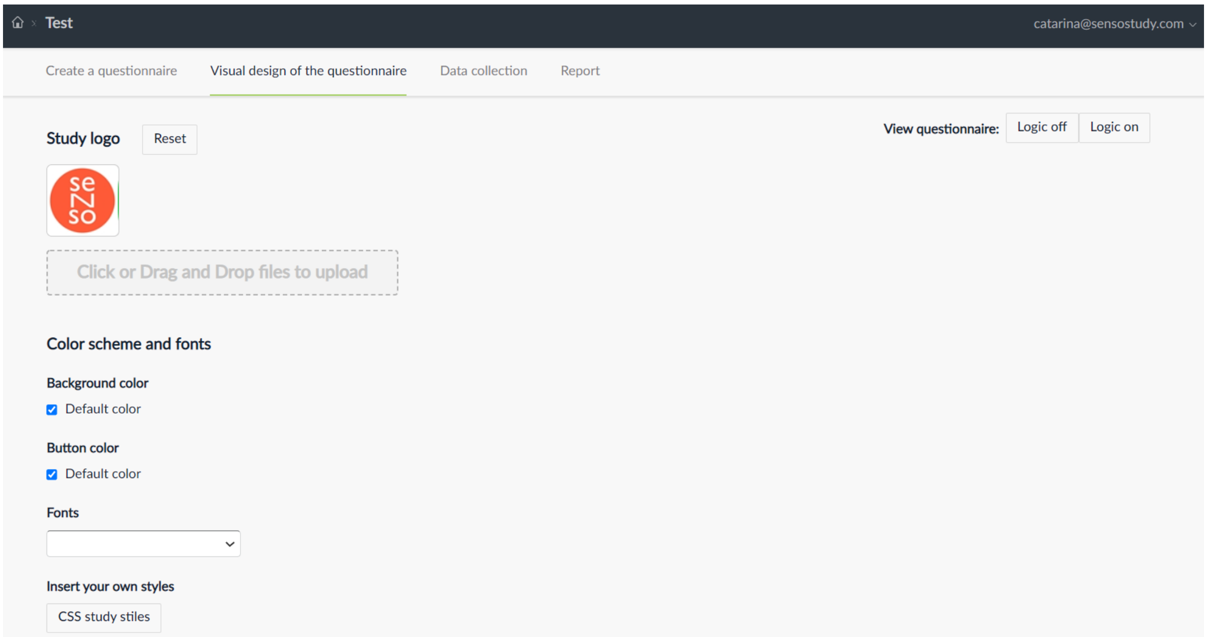


- **Language** - allows you to select the language of your study along with some controls and messages/system screens your respondents will see while taking the test
- **Create a template** - you can check this option to use the study as a template for future tests
- **Face and voice recording** - mainly used with **Website test** task, allows not only record the screen, but face and voice of respondent as well
- **Study description (for internal use)** - put notes that will help you and other colleagues in future to understand what this study is about

- **Show progress bar** - once enabled the progress bar will be shown during the whole study showing the respondents how much they have completed so far
- **Enable filtering by platform/browsers** - you can set up additional screening by allowing respondents to join only using specific browsers or operating systems.

Visual design of the questionnaire

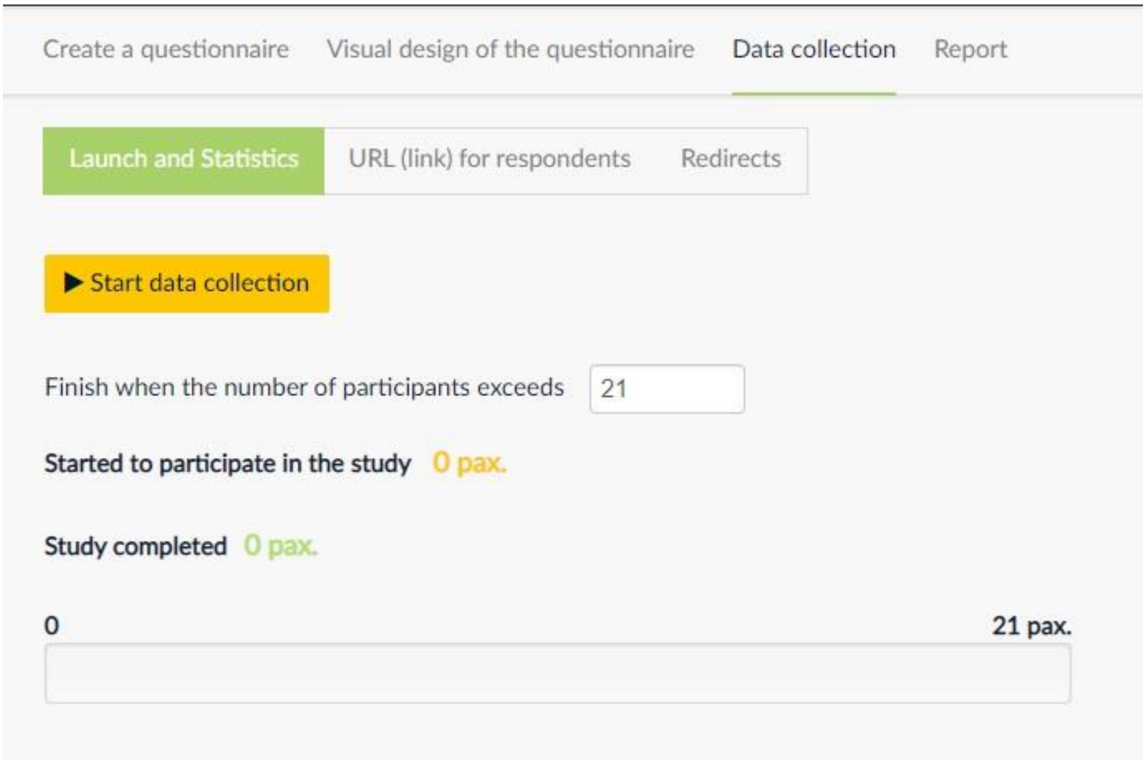
Under this tab you can make some customization to your study - upload your company logo which will be displayed during the whole test in the upper right corner, change background and button colors and even use different fonts.



Data collection

Here you can start your survey, set up links and copy links to the study for your respondents and set up redirects.

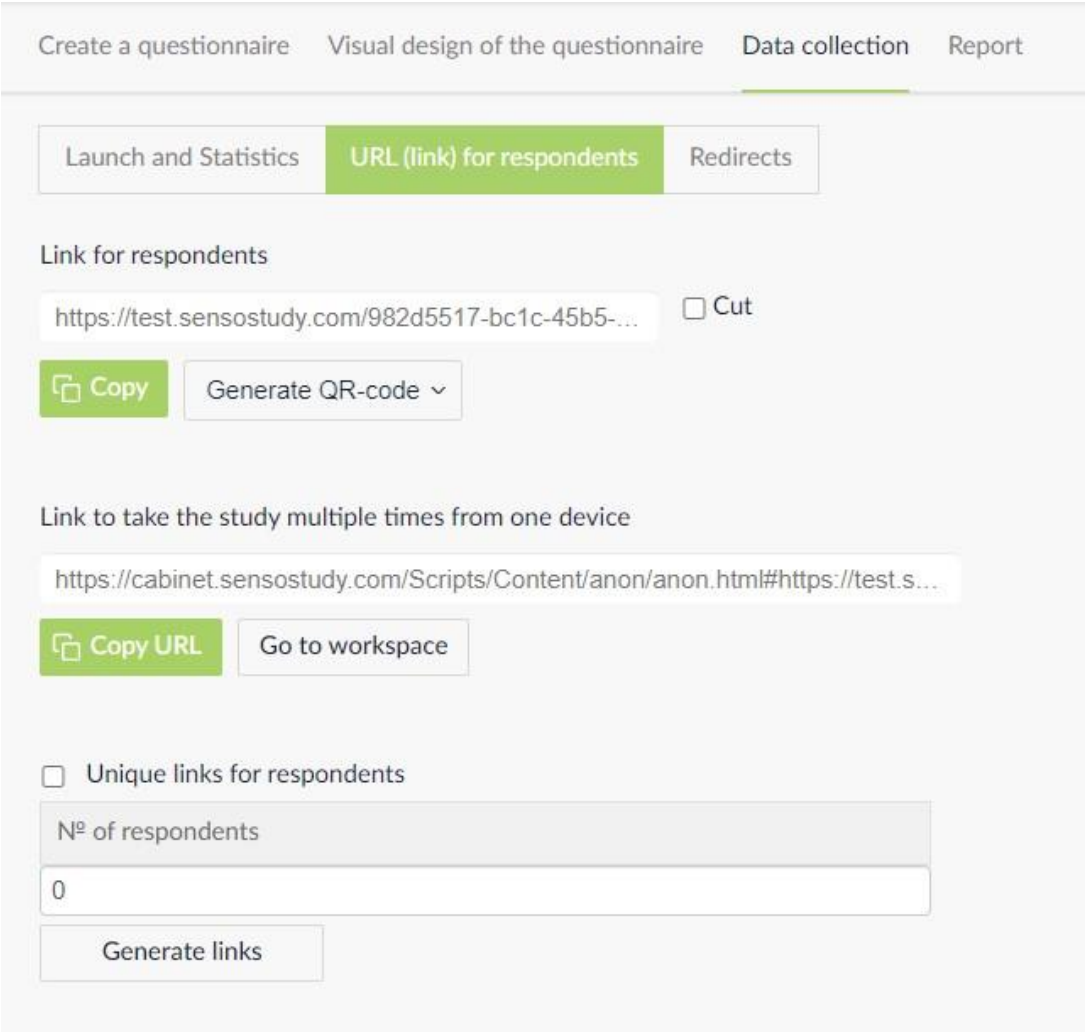
Launch and Statistics



This is one more place from which you can start your study and review the number of respondents participated so far.

It is possible to automatically stop the study once the number of respondents set in the corresponding box is reached. You can always change the number and/or start the study again.

URL (link) for respondents

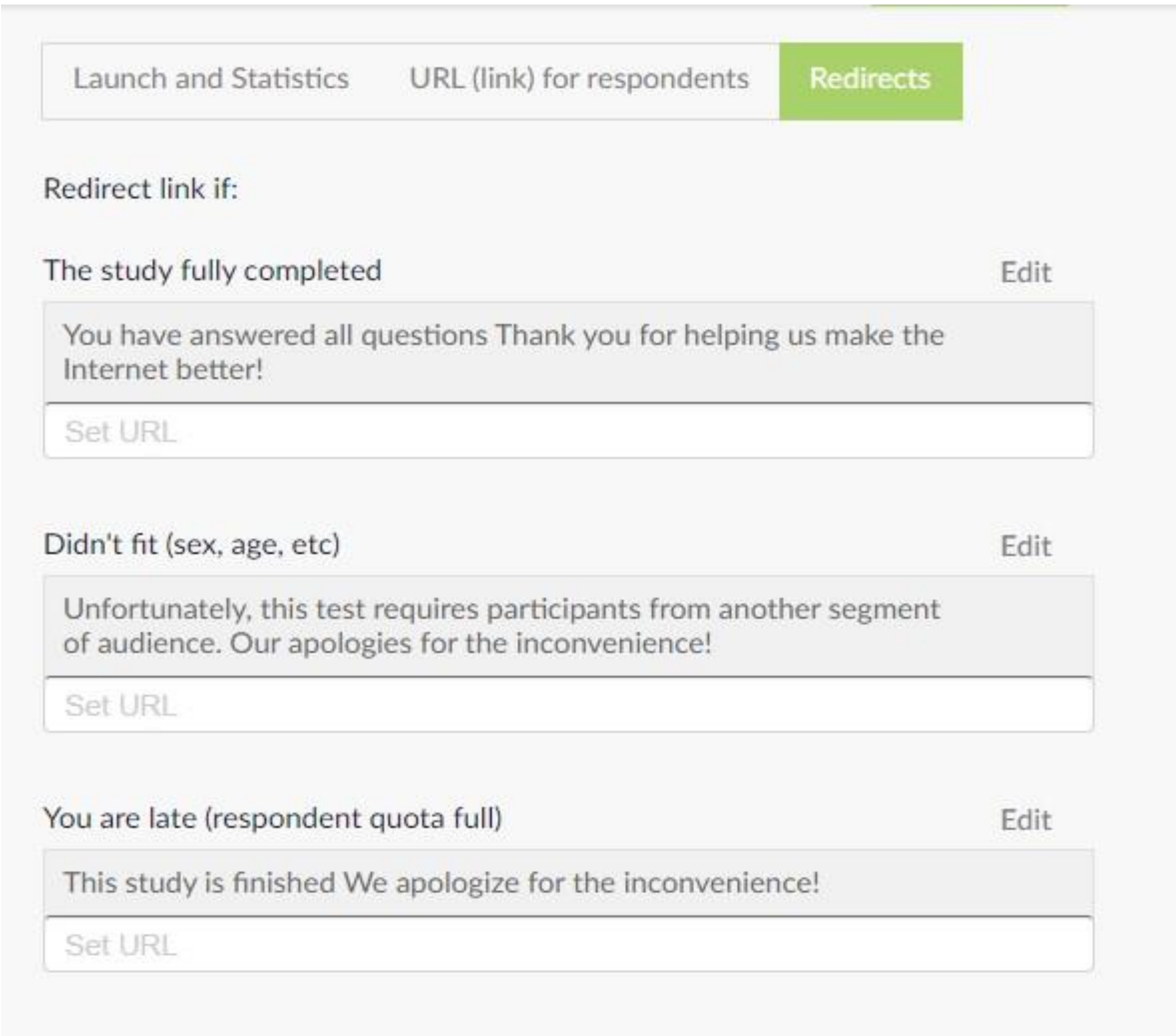


Here you can copy the regular URL to your study, or check the **Cut** option and copy the shortened one. Also it is possible to generate and download a QR-code in PNG, SVG and EPS image file formats.

By default, the system does not allow joining the study from one device more than 1 time, though, you can copy a link which will allow your respondents to do that. This may be useful if multiple respondents will do the test from one device.

When you need to identify respondents you can send unique links to each of them by checking the **Unique links for respondents'** option, entering the number and clicking **Generate links**.

Redirects



Under this tab you can customize messages shown upon finishing the study and/or set up different redirect links which can be helpful when you are working with panels, or want to reward your participants for joining, etc.

- **The study fully completed** - applies to those who completely the whole study
- **Didn't fit** - applies to those who was screened out or the logic rules excluded the respondent
- **You are late (respondent quota full)** - if the respondent joined the study when the limit is reached. Please note, those who did not complete the study do not count towards the participants' limit.