Integrating Qualtrics & Sona Systems: Automating Credit Assignment
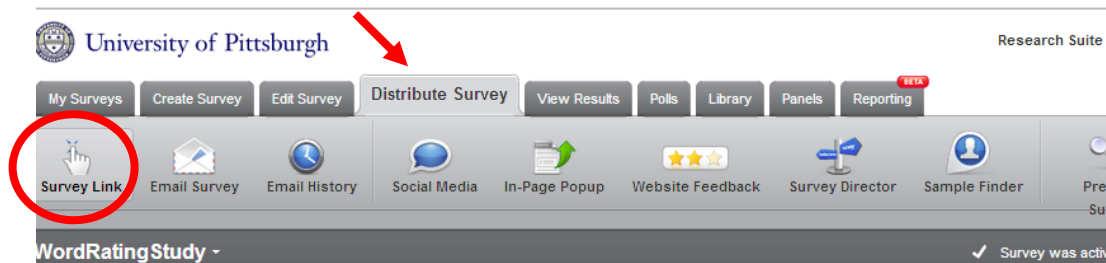
These instructions detail how to configure Sona Systems and Qualtrics programs to enable automatic credit granting. Once these steps are completed, a student who registers for a study through Sona Systems will automatically receive credit at the completion of a related, Qualtrics survey.

Before proceeding, you will need a Sona Systems study and a related Qualtrics survey. Both must be active and approved in their respective programs. As you will need to access both programs in the following steps, you may find it useful to open the programs in separate browser windows.
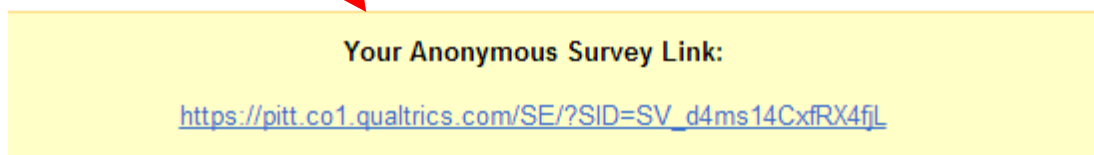
Step 1—Locate Qualtrics Anonymous Survey Link

In this step, you need to locate the Qualtrics Anonymous Survey link and copy it to the clipboard; this will need to be copied to Sona Systems in a later Step.

1. Launch Qualtrics and open the Survey you will be using; make sure the study is "approved" and "active."
2. Click **Distribute Survey**

3. The "Anonymous Survey Link" should appear. If not, click **Survey Link** (circled in image above) to display it

Your Anonymous Survey Link:

https://pitt.co1.qualtrics.com/SE/?SID=SV_d4ms14CxfRX4fjL

4. Highlight this link and copy to your clipboard.

Step 2: Modify Sona Systems Survey; create link to Qualtrics

In this step, you will modify the Sona Systems Study URL to point to the Qualtrics Survey.

1. Browse/log into your Sona Systems program; click on the link to open the survey you would like to integrate with Qualtrics.
2. Click **Change Study Information** from the bottom of the screen.
3. Scroll down to Study URL. Replace the contents of this field with the link you copied to the clipboard in the previous step.

4. Scroll to the end of the link you just pasted; add "**&id=%SURVEY_CODE%**" (without quotation marks). Please note that all entries are case-sensitive.
5. Click **Save Changes**.
6. Copy the link that has "Client side" at the end, but copy only until (and including) the "=" sign (as highlighted in box below). You will be using this link in Step 4.
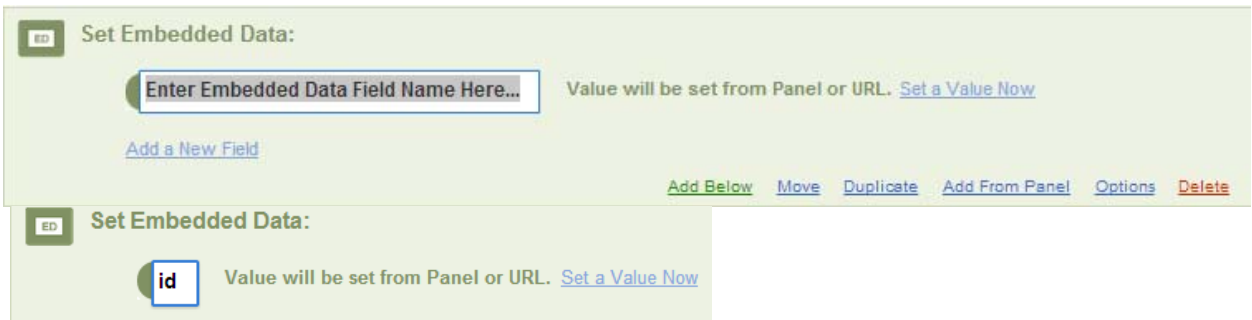

Step 3 – Insert an embedded id number in your Qualtrics survey

In this step, you will need to modify the Qualtrics Survey Flow to incorporate a unique ID number that was assigned by Sona Systems to each study participant.
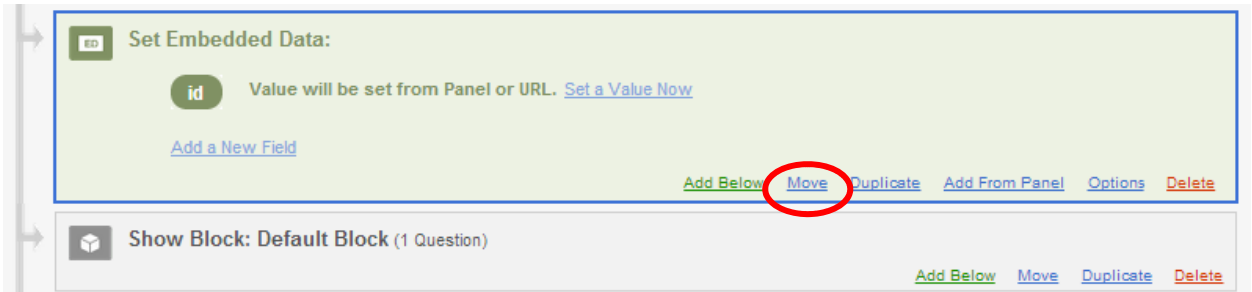
1. Open the Qualtrics survey; click on the **Survey Flow** toolbar icon.
2. When the Survey Flow window opens, click **Add a New Element.**
3. Choose **Embedded Data**.

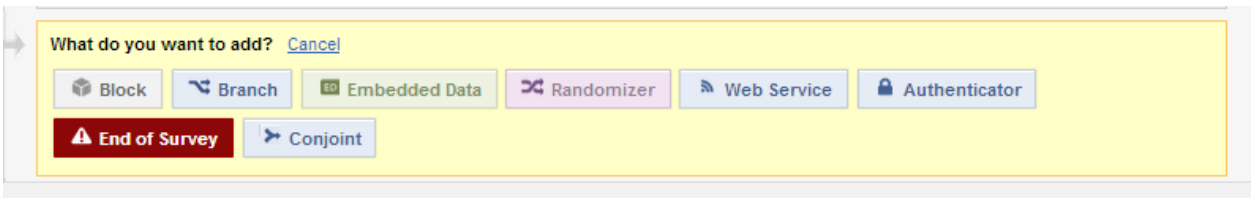4. Type "**id**" in the text box "Enter Embedded Data Field Name Here…"

5. Click **Move** and drag the Embedded Data element to the top of the Survey Flow window.
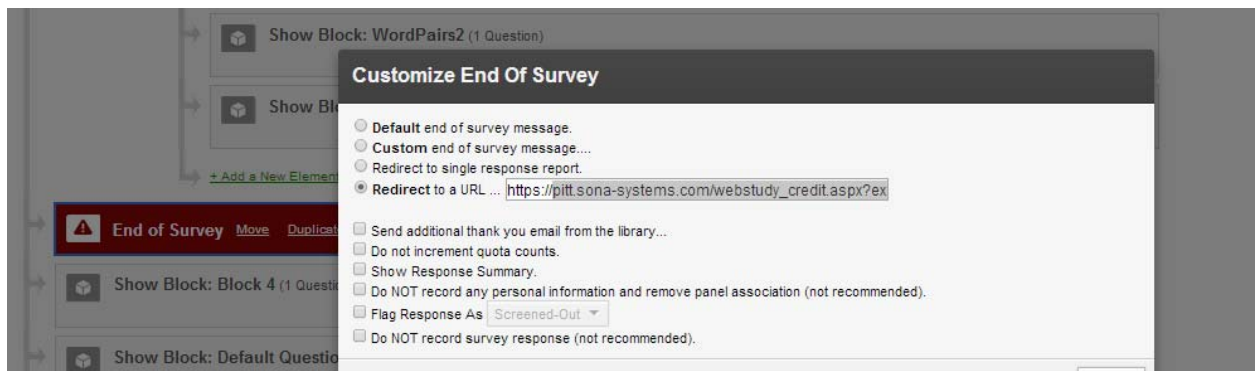

Step 4: Insert an End of Survey Screen to Redirect to Sona

In this step, you will need to add an End of Survey screen within the Survey Flow. Upon completion of the Qualtrics survey, this element will redirect the participant to Sona Systems to be automatically granted credit.

1. Scroll to the bottom of the Survey; click **Add a New Element.**
2. Click **End of Survey**.

3. Select **Customize** and **Redirect to a URL...**
4. Select "**Redirect to a URL...**" Replace the entire contents of the field with the "Completion URL" you copied from Sona Systems (at the end of Step 2).
5. Scroll to the end of the URL you just pasted and add "**${e://Field/id}**" (without quotes)
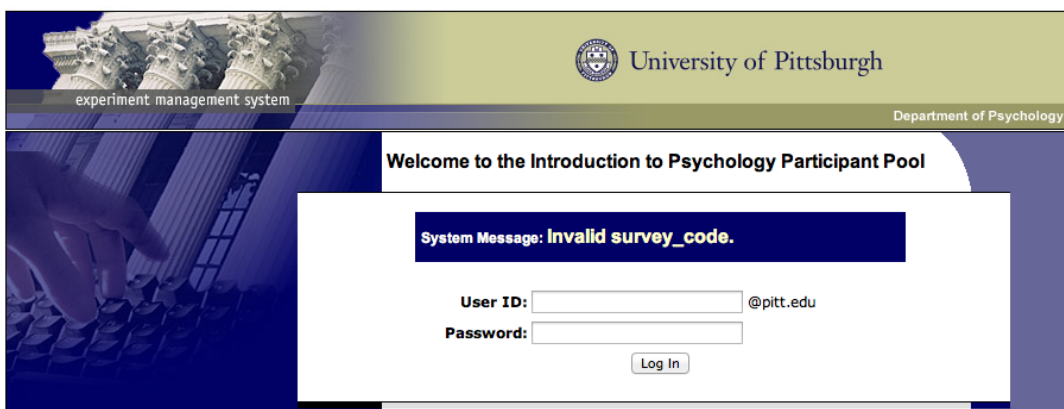
6. Click **OK.**
7. Click **Save Flow**.

Step 5: Test Automatic Credit Granting

Follow these steps to ensure that Sona Systems and Qualtrics are successfully integrated to enable automatic credit granting.

1. Go to the Sona Systems web site and open your study.
2. Click **Sample Link with Embedded ID Code**. You should be redirected to the first page of your Qualtrics survey.
3. If you look at the page URL, you should see a link followed by "&id=xxxx" (where xxxx represents a custom id generated by Sona Systems).
4. Browse through the survey and, upon its completion, you should be redirected to Sona Systems and receive credit.

Important Note: If you are not logged in as a registered participant, you will likely be redirected to Sona Systems but will receive an "Invalid Survey Code" message (as shown below). This suggests a successful test of your configuration.

Please direct any questions to Shari Kubitz (skubitz@pitt.edu), LRDC Computing Services