

ORSEE at Columbia

Experimenters' Guide*

Aug 2017

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*If you see any mistake in this guide, please email us at celss-manager@columbia.edu. Thank you

1 Registering as an Experimenter

- To create an experimenter’s account for you on ORSEE, we will need the following information:
 1. Your first name and last name
 2. Your Columbia UNI or your e-mail address
 3. Signed agreements forms indicating that you agree with the terms and conditions of the Lab and ORSEE. If you have someone else run the experiments for you, then the person running the experiments need to sign both agreement forms while you sign only the lab usage form. Only those who run experiments will be registered to ORSEE.
- If you give us your UNI, the default password is your UNI. You will be able to change your password on your first log in.
- Once you are registered as an experimenter, you can access your private administrative area and proceed to create experiments/sessions at <http://orsee.econ.columbia.edu/admin/>
- Please note that ORSEE is a citeware. As such, you must cite it in any publications of experiments that use it. The current citation is available at <http://www.orsee.org/web/license.php>.
- If you have any question or require updated agreement forms, please email celss-manager@columbia.edu.

2 Creating an Experiment

Roughly speaking, an experiment is designed to answer a question. An experiment is then composed of different sessions which happen at different time slots for various reasons. You will first create an experiment and then create sessions. For instance, your experiment may be “Cooperation Game”, and consists of ten sessions using different parameters.

To create an experiment, after logging into ORSEE, click on “Create new” under “Experiments” on the left hand side menu. Please fill in the necessary details on the form

- Internal name: this will appear on ORSEE calendar but participants will not see this name. We do not have restrictions on this name.
- Public name: Please use an uninformative name to avoid participants guessing the experiment’s purpose or the experimenter’s identity. This is to avoid participants self-selecting into experiments. You may use the ID number provided at the top.

- Description: You do not need to provide a description but if you do, again please try to keep it uninformative
- Type: select the type of experiment (lab or internet)
- Class: You can link your experiment to a specific subset of experiments called class. If the class does not exist and you would like to create it, please contact `celss-manager@columbia.edu`.
- Experimenter: Select the experimenters and those who get email updates

For more details on how to create an experiment and information on the meaning of the different fields, please refer to either the full or the short documentation in the experimenter's package. Also, CELSS is running ORSEE 2, not ORSEE 3. As a result, please refer to the ORSEE documentation attached, and not the wiki located on the ORSEE website.

After creating the experiment, you would want to create your pool of potential participants. You can do this via "Assign subjects". After logging in, you can do so through the following steps

- Click on "My Experiments" under "Experiments" on the left panel.
- Click on the experiment for which you want to create the pool of potential participants
- Click on "Assign subjects" under the "Participants" panel.
- You can select participants depending on different criteria (e.g. age, . . .). If you do not want to use any criterion, you can either check box 1 or do not check anything. Once you have selected the criteria, click "Search and Show".
- The participants meeting your recruiting criteria will appear.
- Choose the subjects on the list to be assigned. Then click "Assign only marked participants". If you want to add all participants on the list, scroll down to the bottom and click "Assign all participants in list".

For new experiments or pilot studies, please assign no more than 200 or 300 subjects to your experiment so as not to flood the subjects with emails. If 4 hours have passed without the session filling, you may assign additional subjects and send another round of emails. Then, please make sure that you select the option to send invites to only those who have not yet received one.

3 Creating a Session

Once you have created an experiment, you can create sessions for the experiment. You do not have to schedule all sessions immediately after creating your experiment. You can reserve up to 6 hours of sessions one week in advance.

We recommend sessions scheduled not less than 3 days and not more than 1 week in advance to ensure subjects having enough time to show up and do not forget about the sessions. Please schedule sessions only during lab opening hours with at least a 30-minute break between sessions of the same experimenters and at least a 1-hour break between sessions of different experimenters. Please also contact the lab manager at celss-manager@columbia.edu before scheduling to avoid potential conflicts.

After you log into your account and create an experiment, you can create a session through the following steps

- Click on “My Experiments” under “Experiments” on the left hand side menu.
- Click on the experiment for which you want to create a session.
- Click on “Create new” in the “Sessions” panel. You can then fill in the required information
 - Date, Time, Laboratory, Duration: self-explanatory
 - Session reminder and Send reminder: the time when an email will be sent to remind participants that they’ve registered for your session (recommended to be 24 hours). You can decide the conditions of the reminder
 - Needed, Reserve participants, Registration end: self-explanatory. The maximum number of participants CELSS can host at one time slot is 24. We also recommend setting “Registration end” to 0.
- We recommend putting 0 needed participant when you first create the session. Then go to the calendar to check if the time is correct. Then you can edit the number as required. This is because once the session is created, the participants can immediately register for the session. It will then be troublesome if there is a mistake in the timing.

There are more restrictions in running experiments at the Behavioral Research Lab of the business school. Please refer to section 9.

4 Inviting Participants

Once you have created your experiment, and scheduled sessions for the experiment, you can invite participants. Note that once you have assigned the subjects and created the sessions, the subjects can already register. Invitations are targeted at those who do not check the ORSEE calendar regularly. After logging in, you can send invites through the following steps

- Click on “My Experiments” under “Experiments” on the left panel.
- Click on the experiment for which you want to send invitations.
- Click on “Send invitations” under the “Participants” panel.
- You can preview the mail by clicking on “Mail preview”.
- You can choose to send to the appropriate participants.
- Please note that you can change the content and the subject of the email. However, please do not change the email since we do not want participants to self-select into experiments. If you have a special request, please contact celss-manager@columbia.edu.
- Please also note that ORSEE send emails in batches and will queue all the invitations and process them regularly.

5 Ending a Session

Once a session is done, you need to mark the participants’ attendance and close the session within a week. This step is extremely important to make sure that the lab functions well. With the attendance record, we can monitor participants’ reliability and remove those who consistently do not show up. You or other researchers can also select participants on experience in future experiments. To do this,

- Log into ORSEE
- Click on “My Experiments” under “Experiments” on the left panel
- Click on the experiment for which you just conducted a session.
- Click on the “Registered participants” in the “Sessions” panel for the session you just ran.
- Check the appropriate “shown-up” and “participated” boxes for each subject.

- Click the “Change” button to save the results.
- Click “Mainpage of this experiment” at the bottom of the page to return to the experiment.
- Click on the “Edit” link of the relevant session in the “Sessions” panel.
- Check the “Session Finished?” box.

6 Canceling a Session

If you have to cancel a session, proceed as follows:

- Go to the session and set “Needed participants” to 0 to stop sign up
- Please notify the lab manager at celss-manager@columbia.edu
- Send an email to the participants registered for the session by going to the session’s list of participants and clicking on “Send bulk mail to listed participants”.
- Once they confirm they have received your notice, set the participant’s session to “no session” in that list.
- Once the session’s participant list is empty, delete the session on the session-edit page.
- You are required to be at the lab at the scheduled time to notify participants in case they have not received the email and showed up. If they do show up, you are required to provide the show-up fee.

7 Ending an Experiment

Once all sessions for an experiment are done, you can end the experiment:

- Log into ORSEE
- Click on “My Experiments” under “Experiments” on the left panel
- Click on the experiment you want to end.
- Click on the “Edit basic data” link in the “Basic Data” panel.
- Check the “Experiment Finished?” box.

8 No Deception Policy

Researchers using ORSEE agree to abide by a strict no-deception policy as outlined in the document attached to those instructions. Deception is here defined not only as outright lie, but also “violations of default assumptions”, such as the fact that the part when the experimenter reads the instructions is not part of the experiment itself.

We provide justifications and solutions to the deception problem in the document attached.

9 The Behavioral Lab of Columbia Business School

- Any usage of the Behavioral Research Lab (BRL) should be worked out on a case-by-case basis. Contact the lab coordinator (<http://www8.gsb.columbia.edu/behaviorlab/aboutus/staff>) to work out an arrangement.
- Any usage of the BRL must comply with its rules.
- If subjects are recruited via ORSEE for an experiment at the BRL, then that experiment must still comply with CELSSs strict no-deception policy.