1 Registering as an experimenter

- For your first use, we will create an account for you with an experimenter’s privileges. To do this, we will need the following information:
  - First name and last name
  - Your Columbia Uni or your e-mail address in full

- We will then create a default password that will be sent to you privately. You will be able to change your password when you first log in.

- Prior to running your experiment, you need to sign an agreement with us, stating that you agree to the terms and conditions, and that you have IRB approval for your project. In order to receive the document, please email Nate Neligh

2 Creating an experiment

An experiment is composed of different sessions. In ORSEE, you will first create an experiment and then create sessions for this experiment. For instance, your project could be “Cooperation Game”, and will consist of ten experimental sessions where different sessions might use different payoff parameters.

For details on how to create an experiment, please see the full documentation from page 21 onwards, or the summary documentation from page 10 onwards. The following guide is a summary of those procedures.

To create an experiment, follow the following steps:

- If it is your first time, we need to add you as an experimenter. Please refer to the section above for how to proceed.

- Once you are registered as an experimenter, you can access your private administrative area with your login and password. If this is the first time you have logged in, please make sure you are changing your password.

- On the right hand side menu, click on “Create Experiment”. Please fill in the details asked for in the form.
  - Internal name: this is the name of the experiment that will appear on ORSEE and will not be accessible to the public. We do not have restrictions on that
  - Public name: Please use the ID number provided at the top for the public name.
  - Description: do whatever you like!
• Type: select the type of experiment

• Class: You can link your experiment to a specific class. If the class does not exist and you would like to create it, please contact Nelgih (nln2110) so that they could add the class.

• Select the list of experimenters for this experiment, and who get emails

For information on the meaning of the different fields, please refer to the full ORSEE documentation, page 22 and 23.

3 Creating a session

Once you have created one experiment, you want to create one or multiple sessions that correspond to this experiment. You do not have to schedule all sessions immediately after having created your experiment. To do so,

• Consult Section 10↓ to familiarize yourself with the condition of use of the Behavioral Research Laboratory of the Columbia Business School. In particular you will need to consult their calendar and book the laboratory at specific hours at most two hours in advance.

• To create your experiment on ORSEE: Access your private administrative area with your login and password.

• Click on “My Experiments” on the right panel

• Click on the experiment for which you want to create a session.

• Click on “Create New” in the “Sessions” Panel on this page. You can then fill in the information requested.

  • Date, Time, Laboratory, Duration, speak for themselves

  • Session reminder explains at what time an email will be sent to remind people that they've registered for a session. You can decide on whether the reminder is sent automatically or not, and on what conditions it should be sent, in the next menu

  • Needed, Reserve participants, Registration end speak for themselves

  For information on the meaning of the different fields, please refer to the full ORSEE documentation, page 24 and 25.

4 Assigning subjects

Once you have created your experiment, and scheduled sessions for this experiment, you want to invite participants in the participants’ pool. Those participants might have to satisfy certain criteria. This section describes how you would decide who can and cannot register for your experiments.
Access your private administrative area with your login and password.

Click on “My Experiments” on the right panel.

Click on the experiment for which you want to assign subjects.

Click on “Assign Subjects” under the “Participants” panel.

Here, you can select participants depending on different criteria (e.g. age, …). If you do not want to use any criterion, tick the box 1. Once you have selected the criteria, click “Search and Show.”. The participants meeting your recruiting criteria will appear.

5 Inviting participants

Now that you have found the subjects who can be potential participants in your experimental sessions, you can send invitation emails to them.

Access your private administrative area with your login and password.

Click on “My Experiments”. Click on the experiment for which you want to send emails.

Click on “Send invitations” under the “Participants” panel. This will redirect you to a page, i.e. the email is not sent yet. You can preview the mail that is going to be sent by clicking on “Mail preview”. Then, you can send it by clicking “Send”.

Note that you can change the content and the subject of the email. In the content of the email, ORSEE uses several keywords for specific variables, such as first names and last names. For more information on how to modify the email sent, please refer to the full ORSEE documentation, page 28 and 29, and page 49 for the keywords.

Note that the messages are not send directly, but rather put in a table. A so called “regular task” will process the mail queue regularly.

Note: if a subject sends a email to de-register, you can proceed as follows: To deregister a subject as an administrator, simply go to the session’s participant list, set the session field for the participant to No session , and click the Change button at the end of the list.

ORSEE does not provide a way for a participant to de-register by herself.

6 Ending a session

Once a session is done, you want to register who showed-up and benefited from the show-up fee you proposed, and who actually participated. To do this,

Access your private administrative area with your login and password.

Click on “My Experiments” on the right panel
• Click on the experiment for which you want to create a session.

• Click on the “Registered participants” link in the “Sessions” panel, for the session you just ran.

• For showed-up subjects (the persons who receive a show-up fee from you) mark the “shown-up”, and for persons actually participating mark the “participated” box. This step is extremely important. For instance, this helps us monitor the reliability of participants. This also enables you or other researchers to select participants on experience in future experiments.

• At the end click the “Change” button to save the results.

• Go back to the main page of the experiment, by clicking the link at the bottom of the page, “Mainpage of this experiment”:

• Click on the “Edit ” link of the relevant session, in the “Sessions” panel

• Check the “Session Finished?” box. From now on, this session will be included in the calculation of the subject’s participation history.

7 Ending an experiment

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

• Access your private administrative area with your login and password. Click on “My Experiments” on the right panel

• Click on the experiment that you want to end

• Click on the ‘Edit basic data” link at the bottom of the “Basic Data” panel, for the session you just ran.

• Check the “Experiment Finished?” box.

8 Cancelling a session

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

• Send an email to the students signed up for this session by going to the session’s list of participants and clicking on “Send bulk mail to listed participants”.

• Once they confirm they 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.
9 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.

10 Specific directions to use the Behavioral Research lab of Columbia Business School

10.1 Access to the laboratory

The Economics Department has been granted access to the Behavioral Research Lab facility (referred as “the lab” below) on the 3rd floor of Uris Hall (Room 304, which features 20 workspaces with desktop computers with online access for participants, plus an additional computer for a researcher). The agreement the Economics Department made with the Business School and the Behavioral Research Lab managers is detailed in the following points:

• Members of the Economics Department will have the ability to schedule and use Room 304 in Uris Hall on regular weekdays (Mondays to Fridays) from 6:30 PM to 10:00 PM, and weekends from 9:00 AM to 8:00 PM.

  • This arrangement does not cover other lab facilities, including the basement of Uris Hall, the lab’s own participant pools and SONA research scheduling system, or the lab’s petty cash system

• All research to be conducted in lab facilities has to be reviewed and approved by the Columbia University Institutional Review Board (IRB) and any other relevant governing bodies.

• In the interests of security, the Department of Economics will identify all authorized users of the laboratory (e.g., faculty, doctoral students) to the Lab Coordinator, Rita Ludwig. These guest users will receive the security code for the lab room and are responsible to ensure that the code is not disseminated to unauthorized individuals. Any disclosure of the code to others should be reported immediately to the Lab Coordinator.

• Before using the lab facilities, guest users should familiarize themselves with lab policies at the lab’s website: http://www7.gsb.columbia.edu/behaviorlab/

• Guest users should respect the effective norms about treatment of the space set up by the lab community (e.g., leaving facilities clean after use), activities in the lab (e.g., only research and relevant work), and cooperation with others (e.g., helping other researchers as appropriate). Guest users who undermine the lab community may lose access to the facilities.

• Columbia Business School lab users have priority over guest users in scheduling space.
However, we anticipate a reasonable amount of residual hours during evenings and weekends that can be scheduled by guest users. The scheduling procedure will be as follows:

- Columbia Business School lab users will be able to schedule evening and weekend times in Room 304 through the online lab calendar (http://sites.google.com/site/behaviorlabsite) **15 days in advance**. These hours will count against regular lab users’ budget hours. Guest users cannot schedule times 15 or more days in advance. **Evening (M-F 6:30-10:00 PM) and weekend (SAT-SUN 9:00 AM 8:00 PM) times for Room 304 will be considered “residual hours”**. These can be reserved by both regular lab users and guest users from the Department of Economics. For regular lab users, these will not count against budget hours. **Room reservation requests should be emailed to the Lab Coordinator (Rita Ludwig at rml2149@columbia.edu).** Check the online lab calendar first for openings and then send an email request noting the name of the principal investigator, the name of the researcher who will be physically present while running the study (if that’s someone different), and the requested hours and dates of use. **Response emails, including confirmations, are typically sent within a 48-hour period, Monday-Friday.** The online calendar displays current reservations and will be updated once a guest user’s request have been booked.

### 10.2 Security

When conducting your experiment, you should contact the director of operations for Uris Hall, **Mercy D’Alessandri**(md34) about who the participants may be. This is a courtesy measure with regards to building and public safety.

### 10.3 Extra Information

Please refer to **The B-school experimental lab website** for further information. In particular, their calendar is available online.