Digital Diaries
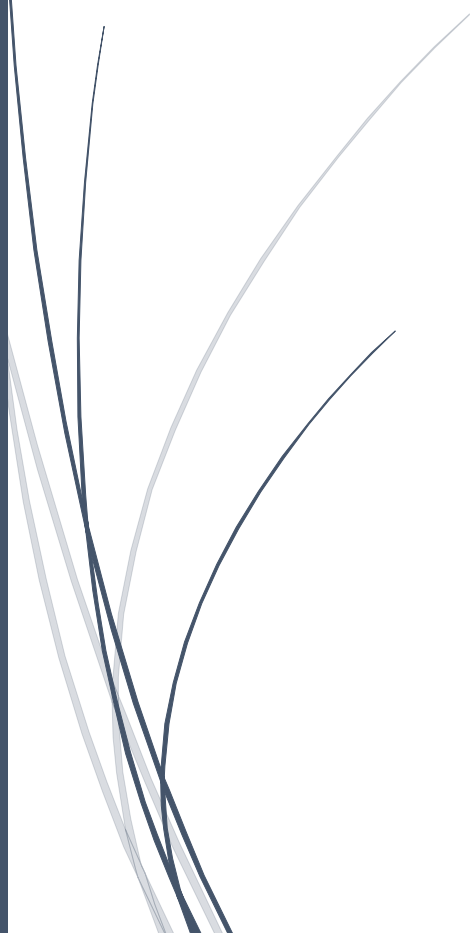
Getting Started
with Digital Diaries

A Guide for Observers

Version 1.0 – February 2023

Introduction

As an Observer to a community, you will be able to access the community at any time you wish.

When accessing the community, you will be able to view the activities and questions that have been uploaded to the community for participants to engage with. You will also be able to read participant responses and provide feedback on each activity to the research team.

However, as an observer to the community, there are some limitations. You will not be able to create or edit questions for participants to engage with. Nor will you be able to comment or question participants directly. Should you wish to add any additional questions to the community, or question a participant directly based on their feedback, we encourage you to speak directly to the Research in Finance team, who will be happy to assist.

To help navigate the Digital Diaries platform, we have created this comprehensive guide. We hope you find the Digital Diaries platform easy to navigate, but if you have any problems or questions with the platform, please don't hesitate to contact the Research in Finance team.

Version 1.0 – last updated 16ᵗʰ February 2023
Research in Finance Ltd.80 Coleman Street, London EC2R 5BJ.
Registered in the UK, number: 8441324 www.researchinfinance.co.uk   1

Accessing the community

The team at Research in Finance will set you up as an observer on Digital Diaries. All that is needed from you at this point is your preferred email address that you would like to use for login.

Shortly after, you should receive an invite email from studyspace.net (if you do not receive this email, please check your spam mail inbox in case the email has been redirected there).
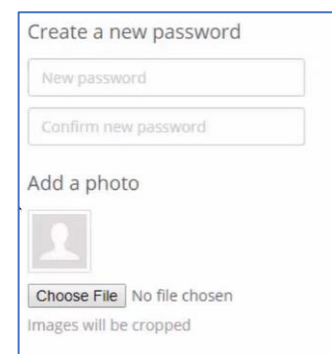
The Invite Email
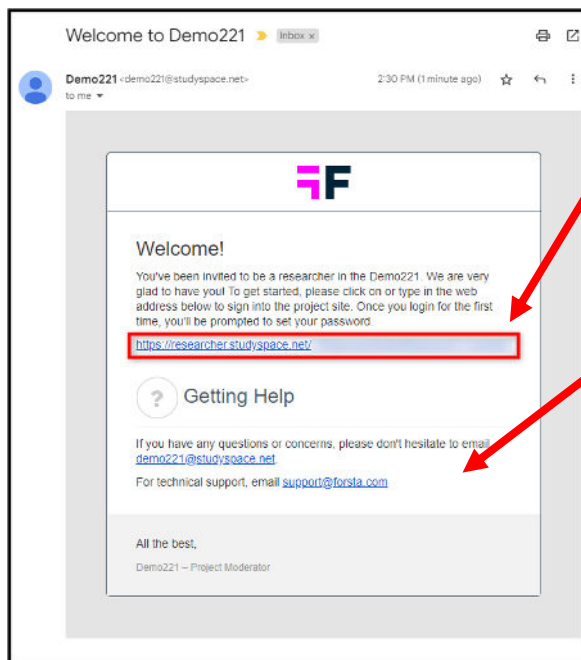
This invite email will contain a welcome message to the community that you have been invited to and a weblink to access the community.

The email will also contain instructions should you encounter any problems or have any questions for the technical team at Forsta, who host the Digital Diaries Platform. **However, as a first point of contact should you encounter any problems, please speak to the team at Research in Finance.**

Setting up your account

When accessing the community for the first time you will need to create an account. Once you click on the link in the invite email, you will be directed to the Welcome page in Digital Diaries, where you must configure your account prior to accessing the project.

1) Create a memorable password that can be used each time you choose to log into the community. You will then need to confirm this password.
2) You can upload a photo of yourself to use as your profile avatar, but this is optional.

Version 1.0 – last updated 16ᵗʰ February 2023
Research in Finance Ltd.80 Coleman Street, London EC2R 5BJ.
Registered in the UK, number: 8441324 www.researchinfinance.co.uk   2

3) Select your preferred option on how often you would like to receive notifications.
4) Select your time zone.
5) Please read and agree to the terms and conditions.
6) Click 'Continue to the dashboard' to access the community.

Navigating the community

On clicking 'Digital Diaries', the project you have been invited to observe will open on the project overview page.

Please Note: if you have been invited to observe on several projects, the following screen will appear. Select the research project you wish to open to access that specific project overview page.

1. The '?' icon at the top right is the help function should you need additional guidance on how to use the Digital Diaries platform via the 'Knowledge Base' link. However, if you encounter any problems, please feel free to contact the Research in Finance team first for assistance.

Version 1.0 – last updated 16ᵗʰ February 2023
Research in Finance Ltd.80 Coleman Street, London EC2R 5BJ.
Registered in the UK, number: 8441324 www.researchinfinance.co.uk   3

The Overview Page

To the top left of the project overview page you will see the navigation menu icon (3 horizontal lines). Click this button to open and close the navigation menu. You will also see the project title. By clicking the project title, a drop-down menu will appear displaying other projects you may have access to, as well as a link to view all projects that you have access.
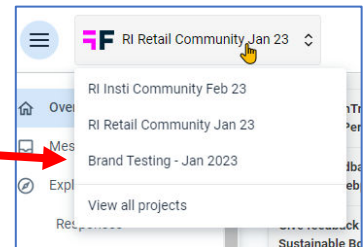
On the project overview page you will see the community navigation menu to the left of the screen (if this is not visible, this can be opened by selecting the menu icon at the top left of the screen). From this menu you will be able to navigate to other areas of the community.
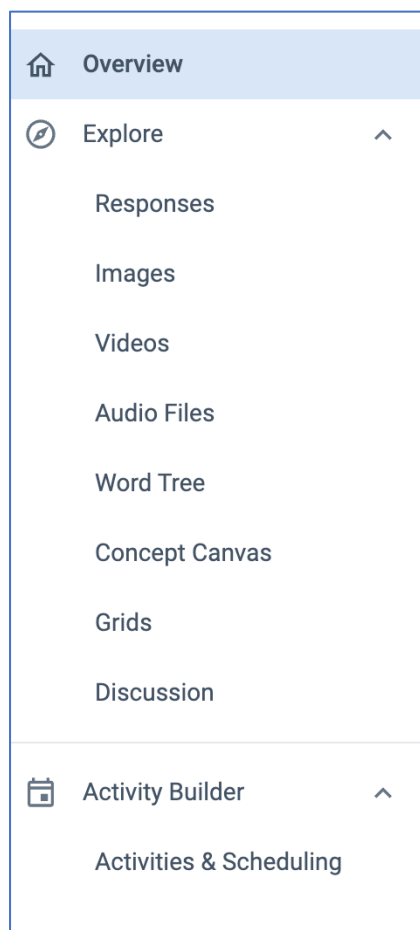
Responses

By clicking 'Responses' from the navigation menu, you will be able to view all participant responses to each activity. This is sorted by order of most recent response at the top.

By clicking on each response widget, the detailed version of the response will open to the right of the screen.

You can also use the filter function at the top of the screen (by clicking 'Add filter') to filter responses by specific activities, participants, segments, etc.

You may add a comment below a participant's response, but this comment will only be seen by the Research team and not the participant or any other participant. **However, for ease and to ensure your communication is seen, we would recommend you instead communicate directly via email with the Research in Finance team.**
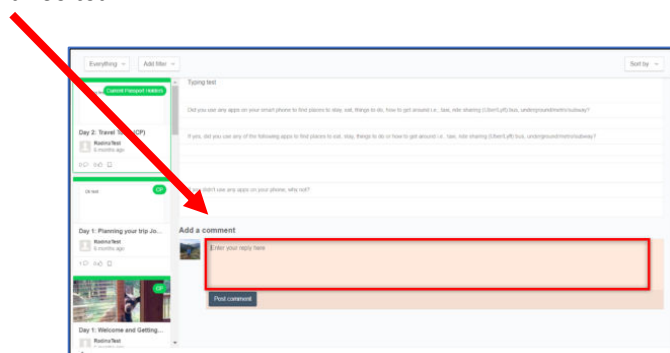
Images

By clicking 'Images', you will see all images that have been uploaded by participants as part of their answers and feedback to activities.

Videos

By clicking 'Videos', you will see any videos that have been uploaded by participants as part of their answers and feedback to activities.

Audio Files

By clicking 'Audio Files', you will see any audio files that have been uploaded by participants as part of their answers and feedback to activities.

N.B. All images, videos and audio files that participants upload will also appear in the 'Responses' section.

Word Tree

By clicking 'Word Tree', you will be able to see a visualisation of the most commonly used words in participants responses.

You can do a deeper dive into these frequently used words by clicking on each specific word. This will help put the word into context, but also list other words that it is connected to (in a tree visual on the right-hand side of the screen).

You can also use the filter function at the top of the screen to filter the word tree to a specific activity or participant by using the 'Add filter' drop down menu.
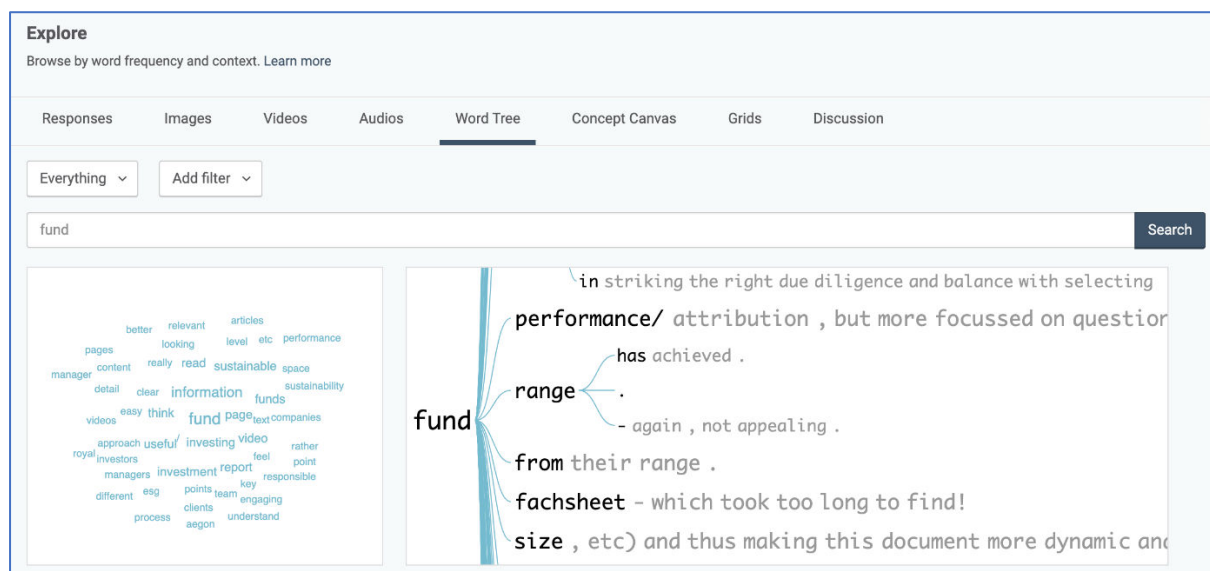
Concept Canvas

The Concept Canvas function allows participants to place pins on visual stimuli or materials that are uploaded onto the community. From this we can examine what aspects of an image they like, dislike or feel neutral about. Participants can also comment on these images using labels and thoughts to explain why they feel this way and attach emoticons to help reinforce their response.

By clicking 'Concept Canvas' you will see all activities in a community that are set up as a Concept Canvas. These activities can be opened by clicking on the specific activity widget that appears to the right on the navigation menu.

On opening the specific Concept Canvas activity you wish to view, you will see the below screen:
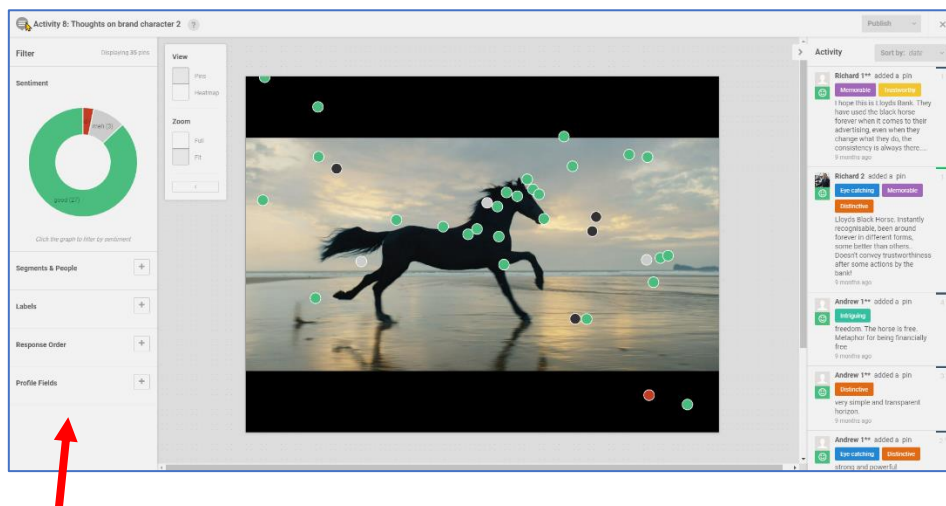
On the left-hand side of the screen, you will see the navigation menu for the activity. This displays a summary of the participants pins in the form of a pie chart (good in green, bad in red, and average in grey). Clicking the specific pin category from this sentiment graphic will filter the pins on the image to identify where participants have placed these pins.

Below this, you can filter the feedback based on either specific segments or participants, specific labels (emoticons participants have attributed to a pin), by participant response order or by their profile fields (such as gender, location etc.)

On the right-hand side of the screen, you will see each participant's pin comment and what emoticon (label) they have assigned to that pin.

You will see the stimulus currently being tested and where participants have placed their pins on the main screen. By hovering over each pin, you will be able to see the participant's comment and emoticon response.
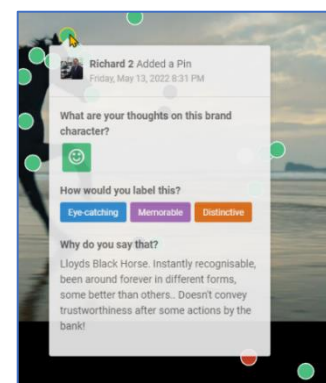
Grids

By clicking 'Grids', you will be able to see a summary of any polls or surveys asked of the community participants. Individual participant responses to any poll or survey questions can be seen on the 'Responses' section.

These polls and survey summaries can also be filtered to specific activities or participants using the 'Add filter' drop down menu at the top of the screen.

Discussion

By clicking 'Discussion' you will be able to view the responses to any open-ended discussions between participants on any activities designed as a group discussion. These can be accessed by clicking on the specific activity widget.

Activities & Scheduling

The 'Activities & Scheduling' page will show a list of each activity uploaded onto the community. You will also be able to see a calendar of the activity release schedule on the right-hand side of the screen.

1. **Activity Area:** List of all designed and uploaded activities on the community. You can also use the "Show Me" filter at the top of this section to filter by all, unposted, or posted activities.
2. **Activity Preview:** Click the arrow in the activity box to reveal the drop-down menu and to view each activity in more detail. You can then preview the activity, which will open on a new tab in your internet browser