

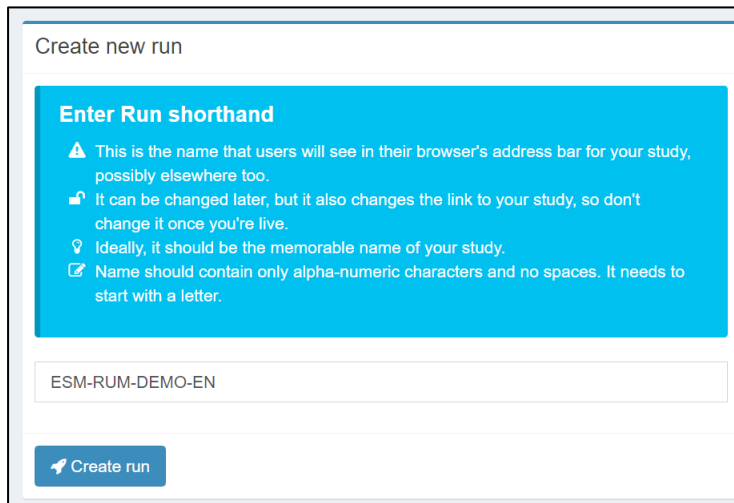
# Instructions on how to import and set up the ESM tool to measure rumination with formr

## Table of Contents

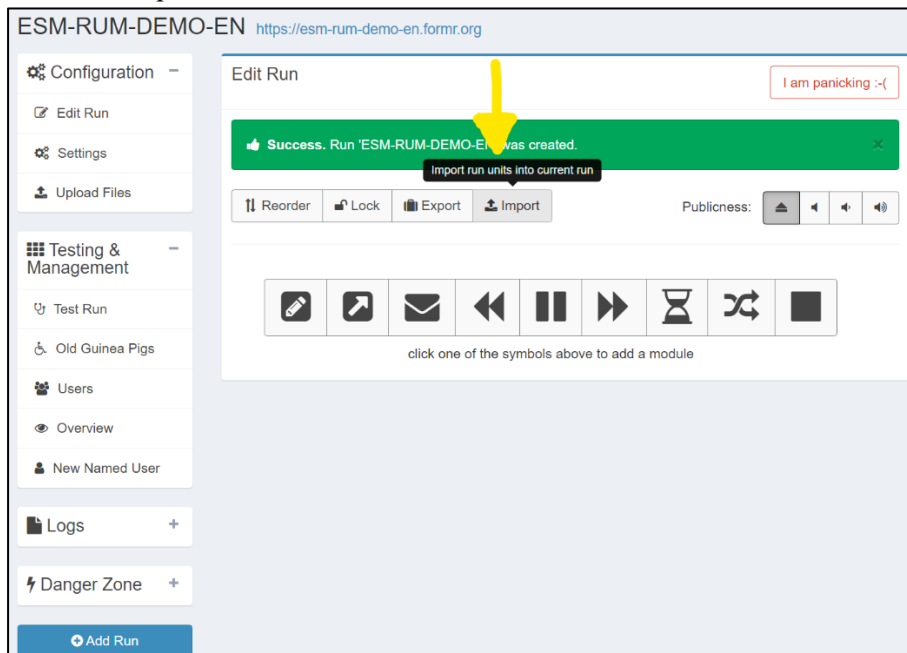
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## Importing into formr

1. Download the “.json” file in the desired language from OSF: <https://osf.io/dngyk/> in the folder “Formr Templates”
2. Go to [www.formr.org](http://www.formr.org) and log in. In case you have not a formr account yet, create one. It can take a few days before you get access to the platform.
  - a. I recommend reading this paper about formr: <https://link.springer.com/article/10.3758/s13428-019-01236-y>
  - b. And I also recommend reading the documentation: [https://formr.org/documentation/#get\\_started](https://formr.org/documentation/#get_started)
3. Once logged in, go to the page [https://formr.org/admin/run/add\\_run](https://formr.org/admin/run/add_run) . For the rest of this tutorial, I will name it “ESM-RUM-DEMO-EN”.



4. Click on “import run”



5. Choose the json file you downloaded and upload it. This has imported the whole protocol! (Note that by default, your study is kept private)

JSON import of modules

Choose an existing complex building block

Select...

OR

use your own or a colleague's exported JSON here and import any run

Select a json file

Choose file

No file chosen

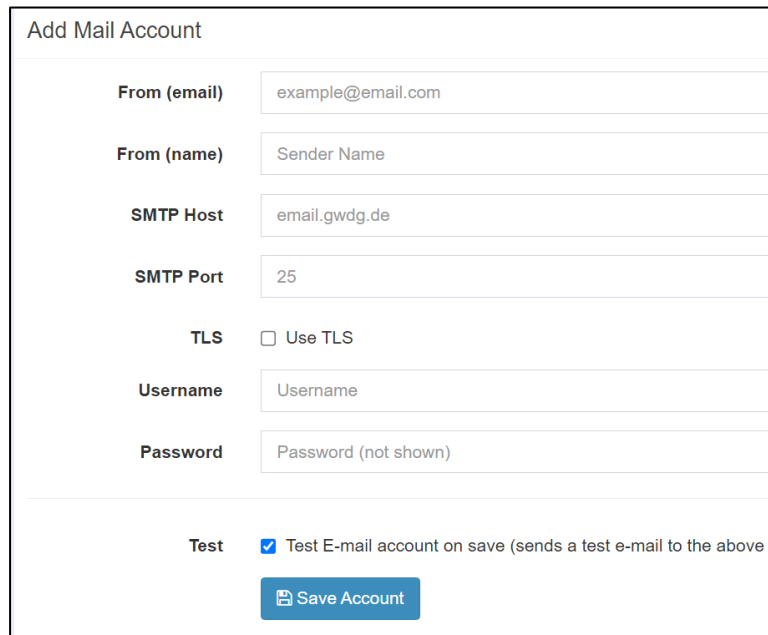
Import

Close

## Basic configuration

To finish setting up the basic configuration, you must do a few additional things.

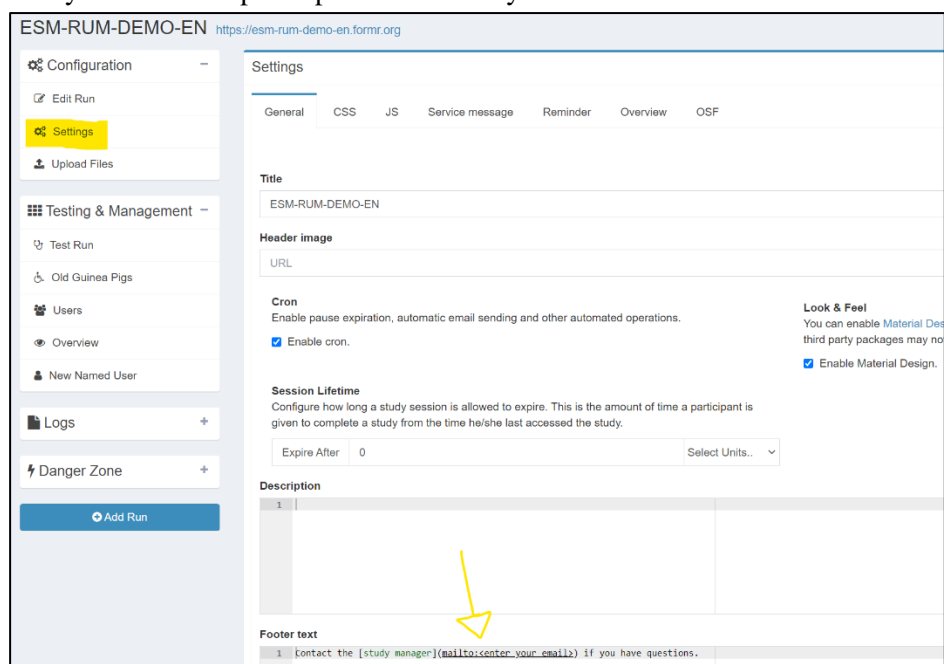
1. You will need to send out emails to participants. For this, you need to set up your email address of your institution (or an email address from a third-party service in case your institution does not allow sending emails through SMTP). Go to: <https://formr.org/admin/mail>. Fill in the information. Formr will send you a test email to check whether the connection works.



The screenshot shows the 'Add Mail Account' form. It contains the following fields and options:

- From (email):** example@email.com
- From (name):** Sender Name
- SMTP Host:** email.gwdg.de
- SMTP Port:** 25
- TLS:** ☐ Use TLS
- Username:** Username
- Password:** Password (not shown)
- Test:** ☒ Test E-mail account on save (sends a test e-mail to the above email address)
- Save Account:** A blue button with a floppy disk icon.

- a. If you encounter any issues and if your institution is using **Outlook 365**, look at the section “Outlook 365 email SMTP connection”
- b. Add your email for participants to contact you



The screenshot shows the 'Settings' page for 'ESM-RUM-DEMO-EN'. The left sidebar contains a menu with 'Settings' highlighted. The main content area has tabs for 'General', 'CSS', 'JS', 'Service message', 'Reminder', 'Overview', and 'OSF'. The 'General' tab is active, showing the following settings:

- Title:** ESM-RUM-DEMO-EN
- Header image:** URL
- Cron:** ☒ Enable cron. (Description: Enable pause expiration, automatic email sending and other automated operations.)
- Session Lifetime:** Configure how long a study session is allowed to expire. This is the amount of time a participant is given to complete a study from the time he/she last accessed the study. (Expire After: 0, Select Units: dropdown)
- Description:** A table with 1 row and 1 column.
- Footer text:** A table with 1 row and 1 column containing the text: 'Contact the [study manager] (mailto:center.your\_email) if you have questions.'

A yellow arrow points to the 'Footer text' field.

2. On the same page, make sure the “cron” setting is checked:


**Header image**

URL

**Cron**  
Enable pause expiration, automatic email sending and other automated operations.  
☒ Enable cron.

3. Next, go to your run, update the name of the run in the formr run units by using the name you set when you created your run
- Search CTRL+F to find all instances of “ESM-Rum-EN”.
  - Replace each instance with the name you have chosen. In the case of this tutorial, it is “ESM-RUM-DEMO-EN”
  - There are three instances to replace: in block 2, 230, and 232
  - Make sure to “save changes” each time

**text-message notification**

  
x  
**230**

**External link:**  
library(httr)  
# =====  
# ===== text-message SETTINGS  
# =====  
nameRunProject = "ESM-RUM-DEMO-EN"  
# parameters of SMS gateway  
base = "https://WEBSITE URL"  
requestUri = "REQUEST URI"  
apiKey = "API KEY"  
device\_number = 3  
# =====  
# =====  
telephone = enrolling\_surveyEN\$telephone #  
retrieve the stored phone number, you  
would use something like  
survey\$mobile\_number  
session = survey\_run\_sessions\$session  
body\_message = paste0("Hello,\nHere is the  
link to answer the questionnaire:  
https://", nameRunProject, ".formr.org  
/?code=", session, "\nAnswer it as  
soon as possible.\nThank you very much  
in advance.\nVorgo H.")  
☐ end using API  
Expire after 0 minutes  
Enter a URL like http://example.org?code={{login\_code}} and the  
{{login\_code}} with that user's code.  
Enter R-code to e.g. send more data along:  
paste0('http:example.org?code={{login\_link}}&age=', demograph  

Save changes Test

4. Now, you will need to add a few settings to the surveys. Go to the “enrolling\_surveyEN” survey and make sure the following settings are set as following:

<b>Items Per Page</b> <p>Do you want a certain number of items on each page? We prefer specifying pages manually (by adding submit buttons items when we want a pagebreaks) because this gives us greater manual control</p> <input type="text" value="5"/>	<b>Enable Instant Validation</b> <p>Instant validation means that users will be alerted if their survey input is invalid right after entering their information. Otherwise, validation messages will only be shown once the user tries to submit.</p> <p><input checked="" type="checkbox"/> <b>Enable</b></p>
<b>Survey Paging</b>  <b>Custom Paging</b> <p>By enabling custom dynamic paging, your survey items will be "grouped" in pages depending on how your <i>Submit Items</i> are defined in the items sheet. That is, each page ends at a defined submit button. Enabling this option nullifies the above "<b>Items Per Page</b>" setting, which means the number of items on a page will be determined by where <i>Submit Items</i> are placed in your <b>items sheet</b>. <b>You can't change this settings once you select this option.</b></p> <p><input checked="" type="checkbox"/> <b>Enable Paging</b></p>	

5. Verify the settings for “demographicsEN”

<b>Items Per Page</b> <p>Do you want a certain number of items on each page? We prefer specifying pages manually (by adding submit buttons items when we want a pagebreaks) because this gives us greater manual control</p> <input type="text" value="0"/>	<b>Enable Instant Validation</b> <p>Instant validation means that users will be alerted if their survey input is invalid right after entering their information. Otherwise, validation messages will only be shown once the user tries to submit.</p> <p><input checked="" type="checkbox"/> <b>Enable</b></p>						
<b>Percentage Display</b> <p>Sometimes, in complex studies where several surveys are linked, you'll want to let the progress bar that the user sees only vary in a given range (e.g. first survey 0-40, second survey 40-100).</p> <table><tr><td>from</td><td><input type="text" value="0"/></td><td>to</td><td><input type="text" value="100"/></td><td>%</td></tr></table>		from	<input type="text" value="0"/>	to	<input type="text" value="100"/>	%	
from	<input type="text" value="0"/>	to	<input type="text" value="100"/>	%			
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## 6. Verify the settings for “confirmation\_mail\_smsEN”

<b>Items Per Page</b> ⓘ Do you want a certain number of items on each page? We prefer specifying pages manually (by adding submit buttons items when we want a pagebreaks) because this gives us greater manual control <input type="text" value="0"/>	<b>Enable Instant Validation</b> ⓘ Instant validation means that users will be alerted if their survey input is invalid right after entering their information. Otherwise, validation messages will only be shown once the user tries to submit. <input type="checkbox"/> Enable						
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## 7. Verify the settings for “End\_questionnairesEN”

<b>Items Per Page</b> ⓘ Do you want a certain number of items on each page? We prefer specifying pages manually (by adding submit buttons items when we want a pagebreaks) because this gives us greater manual control <input type="text" value="0"/>	<b>Enable Instant Validation</b> ⓘ Instant validation means that users will be alerted if their survey input is invalid right after entering their information. Otherwise, validation messages will only be shown once the user tries to submit. <input checked="" type="checkbox"/> Enable						
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## 8. Verify the settings for “EF\_RUM\_ESM\_v2EN”

<b>Items Per Page</b> ⓘ Do you want a certain number of items on each page? We prefer specifying pages manually (by adding submit buttons items when we want a pagebreaks) because this gives us greater manual control <input type="text" value="0"/>		<b>Enable Instant Validation</b> ⓘ Instant validation means that users will be alerted if their survey input is invalid right after entering their information. Otherwise, validation messages will only be shown once the user tries to submit. <input checked="" type="checkbox"/> <b>Enable</b>							
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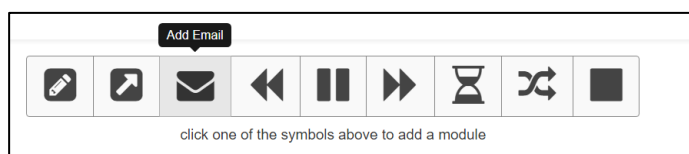
## Important steps regarding sending text messages and emails

Go to the run page. You will see that a “run” (i.e., a protocol) is composed of several modules. Each module has its own code which you can adapt to your needs.

1. If you want to use text-messages, you could set up your own “SMS Gateway” (see for example, <https://codecanyon.net/item/sms-gateway/21419519>) or use a third-party service. In any case, you will have to adapt the settings in the run units **2**, **230**, and **232**
2. If instead you want to use **emails** to notify participants, you will have to replace the text-message modules by email modules.
  - a. To do so, first remove the modules 2, 230, 232 by deleting them one by one



- b. Then go to the bottom of the page and click twice on the “email module” button to add two email modules




- c. Change the number of the modules by clicking on them. Number them with “230” and “232”. Also, give them a title by editing the description. For example: “email notification” and “email reminder”. Each time, do not forget to click on

“save changes”.

The image shows two screenshots of a web interface for configuring email units. The top screenshot is for module 330, and the bottom is for module 340. Both interfaces have a 'Description (click to edit)' section on the left with an envelope icon and a unit number (330 or 340). On the right, there is a green success message: 'Success. Email unit was created.' Below this, the configuration fields are: 'Account' (yorgo.hoebeke@uclouvain.be), 'Subject' (Email subject), 'Recipient' (survey\_users\$email), and 'Body' (a text area). A checkbox 'Send e-mails only when cron is running' is present. At the bottom are 'Saved' and 'Test' buttons. A red text note below the body field states: '{{login\_link}} will be replaced by a personalised link to this run, {{1'.

- d. For module 230,
  - i. Make sure the “account” is configured to use the email you set up.
  - ii. Add a subject line, for example “Study NAME: your survey link!”
  - iii. Add the following variable as a recipient:  
“enrolling\_surveyEN\$email\_verif”
  - iv. Enter a text in the “body”. Make sure to use this variable inside your text so that the personalized link of your participant is included in the email  
“{{login\_link}}”
- e. Follow the same steps for module 232 and adapt the “body” message and subject line.

- ### Email notification



x

**230**

👍 Success. Email unit was created.

**Account**

yorgo.hoebeke@uclouvain.be

**Subject**

Study name-of-your-study : please fill in the survey!

**Recipient**

enrolling\_surveyEN\$email\_verif

**Body**

```
Hello,
```

```
Here is the link to answer the survey:
```

```
{{login_link}}
```

```
Please, answer it as soon as possible.
```

```
Best,
```

```
Yorgo
```


{{login\_link}} will be replaced by a personalised link to this run. {{cron}}

☐ Send e-mails only when cron is running

Saved Test

---

### Email reminder



x

**232**

👍 Success. Email unit was created.

**Account**

yorgo.hoebeke@uclouvain.be

**Subject**

Survey Reminder: please, do not forget to fill in this survey!

**Recipient**

enrolling\_surveyEN\$email\_verif

**Body**

```
Hello,
```

```
Please do not forget to answer the survey.
```

```
Here is the link to answer the questionnaire: {{login_link}}
```

```
You have 60 minutes left to answer.
```

{{login\_link}} will be replaced by a personalised link to this run. {{cron}}

☐ Send e-mails only when cron is running

Saved Test

- <https://esm-rum-demo-en.formr.org>
- 
- Edit Run
- Save new positions
- ⇅ Reorder
- 🔒 Lock
- 📦 Export
- 📁 Import

- 11

1. Remove the lines 2 to 5 and edit the text of the submit button (see image) then save your changes.

	A	B	C	D	E	F	G	H	I	J	K
1	class	type	optional	name	showif	label	choice1	choice2	choice3	choice4	choice5
2		hidden		verification_code_sms							
3		note		note		Please confirm your mobile number by entering the code found in the text message received.					
4		text		verification_code_match_sms		#### Enter the code received here					
5		block		match_error_verification_code		The code you entered is not the right code.					
6		hidden		verification_code							
7		note		note2		Please confirm your email address by entering the code found in the email you received.					
8		text		verification_code_match		#### Enter the code received here					
9		block		match_error_2_verification_code		The code you entered is not the right code.					
10		submit		mail_confirmatic_verification_code		I confirm my email and my mobile phone number					

2. Edit the content of cell E10 (line 10, column “showif”). Replace “verification\_code\_match == verification\_code && verification\_code\_match\_sms == verification\_code\_sms” by this text “verification\_code\_match == verification\_code”

3. Then save your changes

iii. Now, open the csv file “Enrolling\_survey\_EN”

1. Delete the lines 6 to 9, and the line 11 and 15 (see rows in red in the image below)
2. Delete the content of the cell E10 (column “show if”, line 10, see cell in orange in the image below)
3. Adapt the text of the cells F2 and F13 to remove allusions to phone numbers
4. Save the .csv file

iv. Go to

[https://formr.org/admin/survey/confirmation\\_mail\\_smsEN/upload\\_items](https://formr.org/admin/survey/confirmation_mail_smsEN/upload_items)

and upload the edited “confirmation\_mail\_sms\_EN.csv”

confirmation\_mail\_smsEN Survey ID: 100616

Import Survey Items

Please keep this in mind when uploading surveys!

- The format must be one of .xls, .xlsx, .ods, .xml, .txt, or .csv.
- Existing results should be preserved if you did not remove, rename or re-type items. Changes to labels and choice labels are okay (fixing typos etc.). If you keep the confirmation box below empty, the changes will only happen, if the results can be preserved. To possibly overwrite results by uploading a new item table, you will have to enter the study's name into the box. Always back up your data, before doing the latter.
- The name you chose for this survey is now locked.
- The uploaded file's name has to match `confirmation_mail_smsEN` so you cannot accidentally upload the wrong item table.
- You can, however, put version numbers behind a dash at the end: `confirmation_mail_smsEN-v2.xlsx`. The information after the dash and the file format are ignored.

Upload an item table

Choose file No file chosen

Did you know, that on many computers you can also drag and drop a file on this box instead of navigating there through the file browser?

- v. Go to [https://formr.org/admin/survey/enrolling\\_surveyEN/upload\\_items](https://formr.org/admin/survey/enrolling_surveyEN/upload_items) and upload the edited “Enrolling\_survey\_EN.csv”

enrolling\_surveyEN Survey ID: 100613

Import Survey Items

Please keep this in mind when uploading surveys!

- The format must be one of .xls, .xlsx, .ods, .xml, .txt, or .csv.
- Existing results should be preserved if you did not remove, rename or re-type items. Changes to labels and choice labels are okay (fixing typos etc.). If you keep the confirmation box below empty, the changes will only happen, if the results can be preserved. To possibly overwrite results by uploading a new item table, you will have to enter the study's name into the box. Always back up your data, before doing the latter.
- The name you chose for this survey is now locked.
- The uploaded file's name has to match `enrolling_surveyEN` so you cannot accidentally upload the wrong item table.
- You can, however, put version numbers behind a dash at the end: `enrolling_surveyEN-v2.xlsx`. The information after the dash and the file format are ignored.

Upload an item table

Choose file No file chosen


Did you know, that on many computers you can also drag and drop a file on this box instead of navigating there through the file browser?

- i. Lastly, make sure to adapt the text in the sociodemographic survey and within the run modules to replace references to text messages with emails. You can follow the previous instructions to edit and re-upload the other surveys. Or, if you prefer using google sheets, you can follow the instructions in the next section titled

“How to change the content of the surveys”. You need to adapt/verify the text of the following survey:

- i. Edit: “demographicsEN”  
<https://formr.org/admin/survey/demographicsEN/>
- ii. Go back to your main run, in my case “ESM-RUM-DEMO-EN”. You will have to replace words referring to text messages by words referring to emails in the following module:
  1. 200

**Pause till start of the study the next day**



200

wait until time: e.g. 12:00 and

wait until date: e.g. 01.01.2000 and

wait this many minutes convert days

relative to  
`library(lubridate)`  
`next_day()`

**Text to show while waiting:**


```

max_surveys = surveys_by_day *
days_duration_study
days_done = 0
text = ""
# =====
# == first check whether they enrolled
into the study
# =====
if(!exists("ESM_questionnaire") ||
  nrow(ESM_questionnaire) == 0){ text =
paste0("Your email address and mobile
phone number have been confirmed. This
allows us to be sure that you will receive
reminders by text-message and email to
complete the questionnaires." ) else {
# =====
# == option 2 : they already started the
esm period

```

and

**Pause till start of the study the next day**



200

wait until time: e.g. 12:00 and

wait until date: e.g. 01.01.2000 and

wait this many minutes convert days

relative to  
`library(lubridate)`  
`next_day()`

**Text to show while waiting:**

```

`r text`
***

Tomorrow, you will receive an invitation
by text-message to complete the
questionnaire at `r paste(timepoints,
sep=", ")`.

You will have **2 hours maximum** to
answer each time. However, try to respond
as soon as possible. You will receive 1
reminder by *text-message* one hour after
the first notification.

See you tomorrow!


***

### Your progress :
`r progress`

***

```

- Finally, adjust the email for all the email units (3, 230, 232). Make sure that the email you set up is selected:



3

### Send email to verify email address

**Account**  
yorgo.hoebeke@uclouvain.be

**Subject**  
Confirm your email address for the study

**Recipient**  
enrolling\_surveyEN\$email\_verif

**Body**  

```

Your verification code is :
`r_enrolling_surveyEN$verification_code_mail`

If you need to go back to the
questionnaire, here is a link :
{{login_link}}
{{login_link}} will be replaced by a personalised link to this run, {{login_code}} will be replaced with this user's session
code.






```

☐ Send e-mails only when cron is running

Saved Test

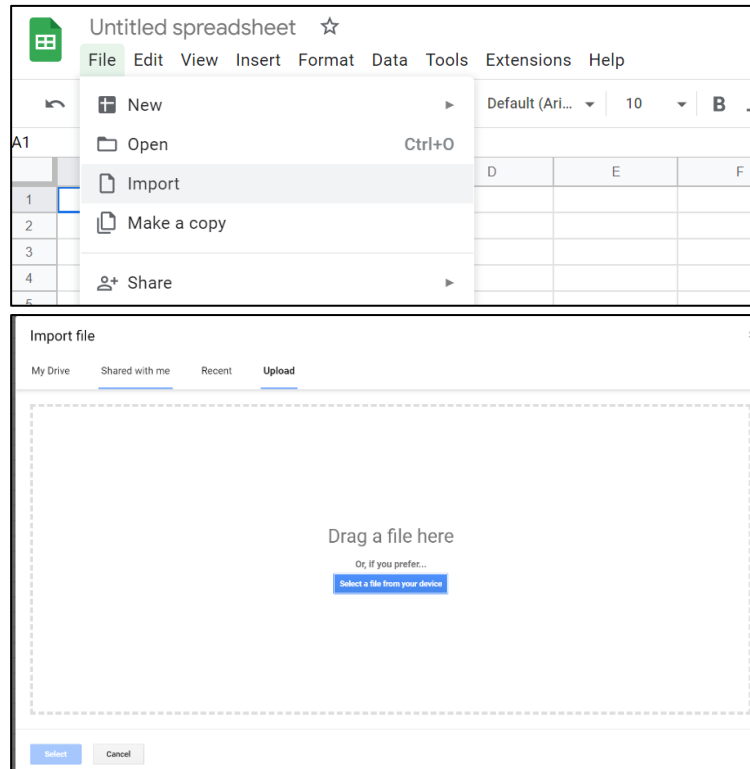
## How to change the content of the surveys easily using google drive

- Download the .csv files from OSF: <https://osf.io/dngyk/> . The CSV files will be under the folder **/Formr Templates/Formr CSV surveys/**  
There are five surveys in this protocol, one csv file for each.

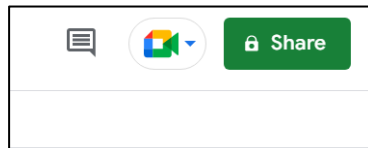
Name
 confirmation_mail_sms_EN.csv
 demographics_EN.csv
 End_questionnairesEN.csv
 Enrolling_survey_EN.csv
 FE_RUM_survey v2_EN.csv

- Upload each one of them in a separate google sheet:  
<https://docs.google.com/spreadsheets/u/0/>

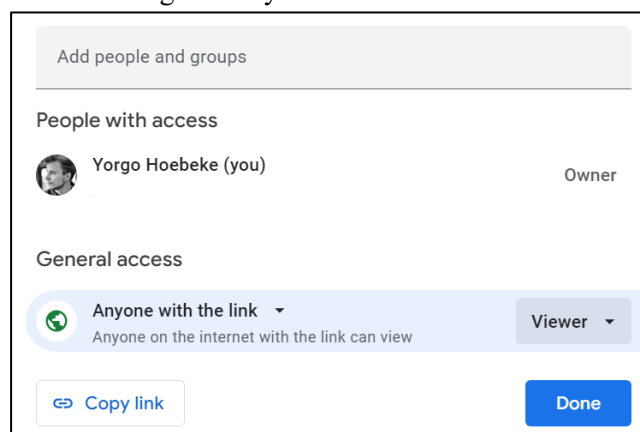
- a. Create a new blank sheet and import a csv file into it



- b. Give a name to your sheet (the easiest is to give it the same name as the name of the corresponding survey in formr)
- c. Now we will create a view only link to put into formr. Click on the share button on the top right



- d. Set the settings to “anyone with the link”:



- e. Copy the link and go to the page of the survey in formr, for example [https://formr.org/admin/survey/EF\\_RUM\\_ESM\\_v2\\_EN](https://formr.org/admin/survey/EF_RUM_ESM_v2_EN)
- f. Go to the page “import items” [https://formr.org/admin/survey/EF\\_RUM\\_ESM\\_v2\\_EN/upload\\_items](https://formr.org/admin/survey/EF_RUM_ESM_v2_EN/upload_items)
- g. Paste the google sheet link in the text area below, then click “upload new items”.  
Now, every time you want to make changes to this survey, you can edit the

google sheet, then come back to this page and click again on “upload new items”.

3. To update the contents of each survey, do the following
  - a. Change the content in the respective google sheet
  - b. Then click on “Upload new items” in formr to update the items using the items from the linked google sheet (assuming you created a share link, copied it, and pasted it in the corresponding survey import page in formr)
  - c. Note that it is best to do this before starting a study or when you are piloting a protocol; otherwise, data might be lost.
4. NOTE: the ESM survey has two functions that you can use and adjust: tooltips and requiring people to answer anything but “50” on the 0 to 100 scale. A tooltip is a text box that allows you to make extra information available for any question.
  - a. To add a **tooltip** to a question, instead of just adding the text as-is in the column “Label”, use this code:
 

```
<div class="tooltip">Write the question here<span class="tooltiptext">Write the explanation of the question here.</span></div>
```
5. Lastly, by default, the value of the ESM items is set on 50 and participants cannot answer 50. In this way, they must move the cursor at least a little bit on each question and cannot submit answers without moving the cursor. If you wish to modify this behavior, you can edit the following google sheets’ elements:
  - a. Select cell F10 in google sheets (or in your csv editor: row 10, column “showif”).
  - b. You can remove this text if you do not want to force participants to answer anything but 50. If you add additional items, you can complete this text so that the same rule applies to the new items you have added

10	submit	submit	4	replaying != 50 && brooding != 50 && criticism != 50 && negativity != 50 && perseverance != 50
----	--------	--------	---	------------------------------------------------------------------------------------------------

Once you become familiar with formr, you will be able to fully adapt the protocol to your needs. Formr is a powerful tool which makes it possible to conduct a wide range of types of studies, even integrating with other platforms to insert, for example, computerized tasks within a formr protocol.

Note: we recommend running your instance of formr on your own server to guarantee stability.

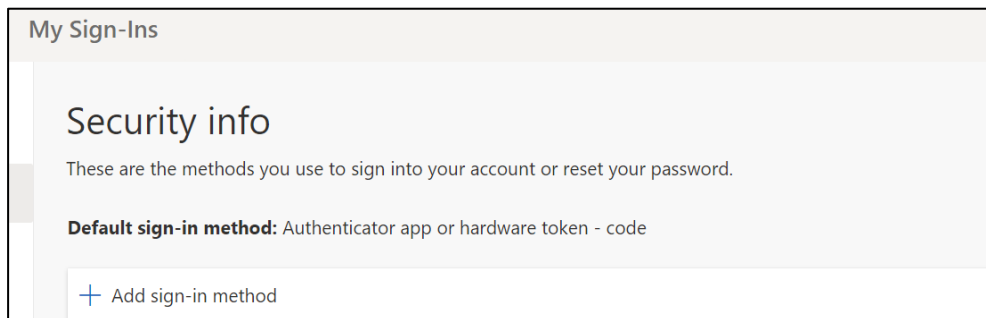


## Outlook 365 email SMTP connection

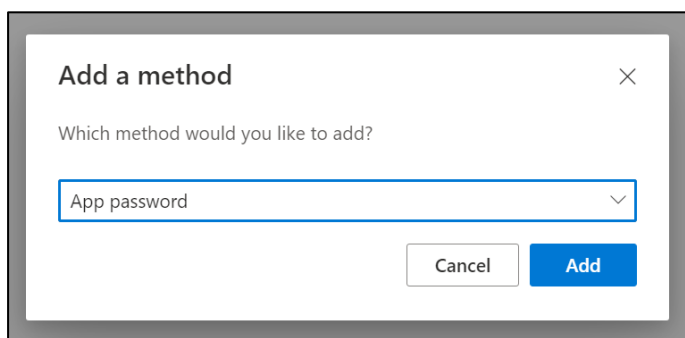
If you or your institution use Office 365 and have Two-Factor Authentication set up, you will have to follow these extra steps for formr to be able to send emails from your outlook account.

[https://evermap.com/Tutorial\\_AMM\\_AppPasswordOffice365.asp](https://evermap.com/Tutorial_AMM_AppPasswordOffice365.asp)

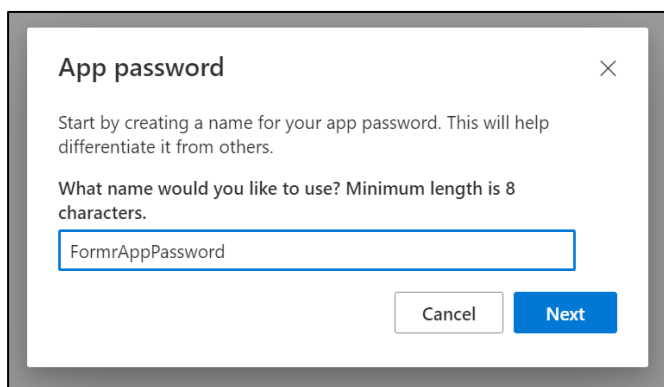
1. First, go to this page and log in if needed: <https://mysignins.microsoft.com/security-info>
2. Click on “add sign in method”



3. Choose “app password”



4. Give it a name



5. Then click “next”. Write down the password somewhere or copy it, because you will only see it once, and you will have to use that password in formr.
6. Now go to <https://formr.org/admin/mail>

7. And set the following settings:

Add Mail Account

From (email)

your@email.com

From (name)

Your Name (or the name of the study)

SMTP Host

smtp.office365.com

SMTP Port

587

TLS

☒ Use TLS

Username

YourEmail

Password

Password (not shown)

Test

☒ Test E-mail account on save (sends a test e-mail to the above address)

Save Account

8. In the password field, paste the app password you copied previously.
9. Upon clicking “save account”, you should see these messages if the setup worked!

Edit Mail Account (yorgo.hoebeke@uclouvain.be)

👍 Success! Your email account settings were saved!

👍 An email was sent to yorgo.hoebeke@uclouvain.be. Please confirm that you received this email.

From (email)

yorgo.hoebeke@uclouvain.be

From (name)

Yorgo Hoebeke

SMTP Host

smtp.office365.com

SMTP Port

587

TLS

☒ Use TLS

Username

yorgo.hoebeke@uclouvain.be

Password

Password (not shown)

Test

☒ Test E-mail account on save (sends a test e-mail to the above address)

Save Account