How to use formr: A beginner's guide

***Disclaimer**: this little guide is based on my personal experience and should not be followed on its own. Please check out the links below and other sources/guides for more info:*

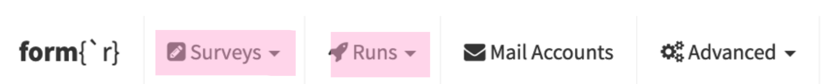
- *https://formr.org/public/documentation#skip_backward*
- *https://github.com/rubenarslan/formr.org*
- *https://github.com/rubenarslan/formr.org/wiki*
- *https://groups.google.com/forum/#!forum/formr*

Creating an Account

To start using formr, you must create an account on formr.org using your email and obtain an administration account by sending an email to accounts@formr.org. Your approval should not take very long (a few days at most).

Basic Vocabulary

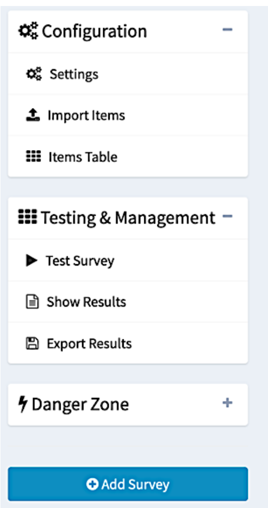
Formr comprises two basic sections: surveys and runs. They can be created and accessed through the top left section of the webpage.



How to create Surveys

Surveys are forms used to gather data from your participants (ex: through short answer or multiple-choice questions). Here, they are created through spreadsheets (such as Excel) and may involve a bit of coding in R if you want to create figures or generate data feedback. The main way to play around and familiarize yourself with how surveys are created is through the following:

- Download the *all_widgets* spreadsheet example: https://docs.google.com/spreadsheets/d/1vXJ8sbkhop4pM5xNqOelRUmslcq2IHnY9052RmQLKFw/edit#gid=1611481919
- Start reading about the different types of survey items: https://formr.org/documentation#available_items
- Once you have an administrator account:
    - Select SURVEYS from the top left panel.
    - Select CREATE NEW SURVEY.
    - Select UPLOAD AN ITEM TABLE.
    - Upload your *all_widgets* file.
    - You can now access the survey through the top panel and see this bar appear on the left of the page; this is how you get to customize and test your survey.

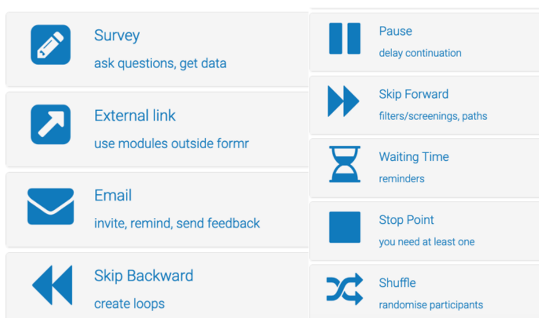


    - Select TEST SURVEY and you get to see how each line of the spreadsheet gets translated into its output.
    - You may then play around with your spreadsheet (alter its items), press IMPORT ITEMS, re-upload the new file and TEST SURVEY again to see how these changes look.
        - Do not change the name of the spreadsheet once it has been uploaded; it will not accept any other name when trying to update the survey version.
        - This is the creative part; take your time and test it out as often as needed. I recommend using the *all_widgets* as a base spreadsheet and then customizing it until you are satisfied with your survey.
    - Finally, you may select SHOW RESULTS to get an idea of what the participant's results will look like (using the results from all your tests).

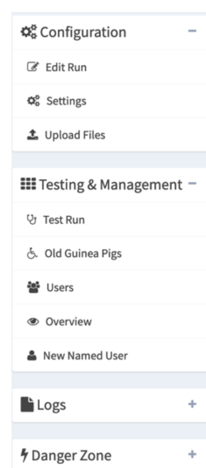
How to Create Runs

Runs are used to access and control the surveys; they are the primary tools for designing your entire study. They allow you to link surveys together, design different pathways depending on what your participants do, send emails and reminders, etc.

- You may create individual surveys, but they can only be used through runs.
- Runs include 1+ surveys and allow you to organize each step (called "module"). They are made out of the following types of modules:
    - For descriptions of each type, see: https://formr.org/documentation#run_module_explanations



- Runs are organized by position and will proceed from one position to the next (in ascending order) unless if stated otherwise (such as if rules are added).
- To create your own run:
    - Select RUNS from the top left panel.
    - Select CREATE NEW RUN.
    - You can now access the run and see this bar appear on the left of the page; this is how you get to customize and test your run.
    - Start by adding your "Survey" and "Stop Point" modules, as those are the two basic requirements for a run to work.
        - You need at least one "Survey" (of course) to collect data.
        - You need at least one "Stop Point" to specify your study's end.
    - You can change the position of each module (the numbers below your module icon such as 10, 20… shown in **Run Design Methodology** on p.4).



Objectives

How you organize your run (i.e. the order for your study's modules) depends on your goal. Here are three simple examples followed by the general methodologies for each:

1. You want to send a survey to x anonymous participants and do not want nor care about their identification.
2. You want to send a non-anonymized survey to x participants (i.e. you will ask for their name or contact info in the survey itself).
3. You want to send a survey to x participants and want it to be anonymous but need to still track each user (ex: if a participant chooses to withdraw their answers, you must be able to figure out who wrote what through an ID). This option also sends two reminders to the participants at 2-week intervals.

Run Design Methodology

You may follow these minimal runs and customize them to fit your own needs! For the sake of all 3 examples, let's call the principal survey for data collection "main".

<u>Example 1: anonymous participants with no ID tracking</u>

1. Create your survey "main"
2. Organize your modules in the following basic order:
    a. Survey.
    b. Stop Point.
3. Send all your participants your run's link (see **Starting your Run** on p.10)
4. Track every anonymous user's…
    a. Progress in the USERS tab in the run
    b. Answers in the SHOW/EXPORT RESULTS tab in the survey section itself

Example 2: known participants giving their info for ID tracking

1. Make sure your "main" survey includes questions asking participants for their contact information so that you can track them through the survey results;
2. Organize your modules in the following minimal order:
   a. Survey;
   b. Stop Point.
3. Send all your participants your run's link (see **Starting your Run** on p.10)
4. Track every anonymous user's…
   a. Progress in the USERS tab in the run
   b. Answers in the SHOW/EXPORT RESULTS tab in the survey section itself

Example 3: anonymous participants with ID tracking

1. Create 2 surveys:
   a. One for ID tracking (let's call it "emails")
      i. It will ask for your participant's info (such as name and email) for tracking their individual progress (being able to recognize their identities) and sending them their anonymized link to access the real questionnaire
   b. One for the actual questionnaire ("main")
2. Organize your modules in the following basic order:
   a. "emails" survey;
   b. "email" module (first email wave);
   c. "pause" module of a few seconds/minutes*;
   d. "waiting time" module;
   e. "email" module (reminder wave #1);
   f. "waiting time" module;
   g. "email" module (reminder wave #2);

*If you do not include this module, once you complete the "emails" survey you will automatically move onto the next step as if the user had clicked on the email's link – which you do not want

h. "waiting time" module;

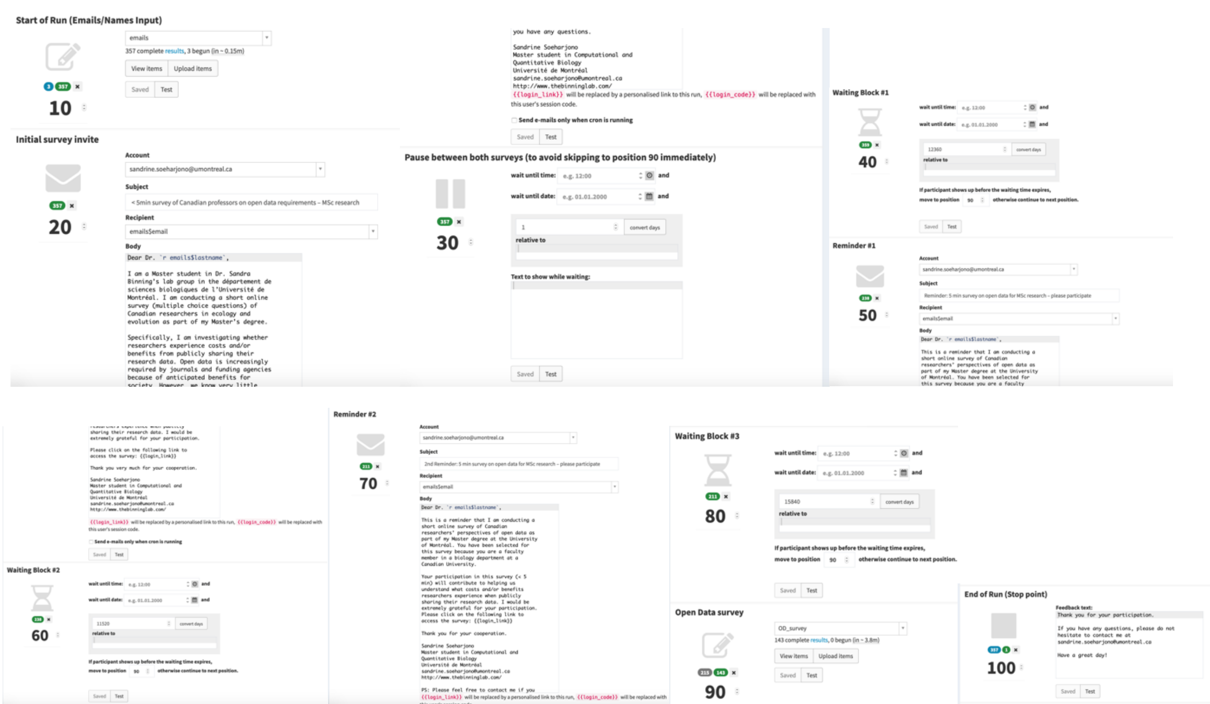
i. "main" survey;

j. Stop point.

You select how long you want each waiting time to be and the number of reminders you'd like (as well as their content).

During each "waiting time" module, you will see an option at the bottom telling you that if the user shows up (i.e. accesses the survey) before that module is over, they will be redirected towards a certain position. Choose this to be your "main" survey's position. This means that if the user presses on their survey's link from their invite, they will no longer receive any further reminders, and will skip those steps to reach the "main" survey module directly.

Here are some examples, to show you how you may use the info inputted in the "emails" survey to personalize each email/reminder wave afterwards:



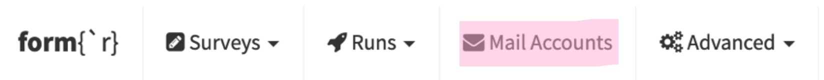
3. This part is tricky; since formr <u>does not</u> currently allow for you to simply upload a list of names/emails for the waves to be sent automatically, you will have to input this data (filling the "emails" survey) yourself before the subsequent modules send every participant their personalized link. To do this, you need to:
    a. Make sure you have your list of emails/names/other contact info handy
    b. Repeat the following steps for every participant:
        i. Open a private window on your browser;
        ii. Enter your personalized run's link (see **Starting your Run** on p.10);
        iii. Manually fill out the contact info and press submit;
        iv. Close the window.

It is important that the window is anonymous, otherwise your browser will recognize the link and assume that you are the same participant trying to reconnect the same run (thus telling you that this survey was already completed).

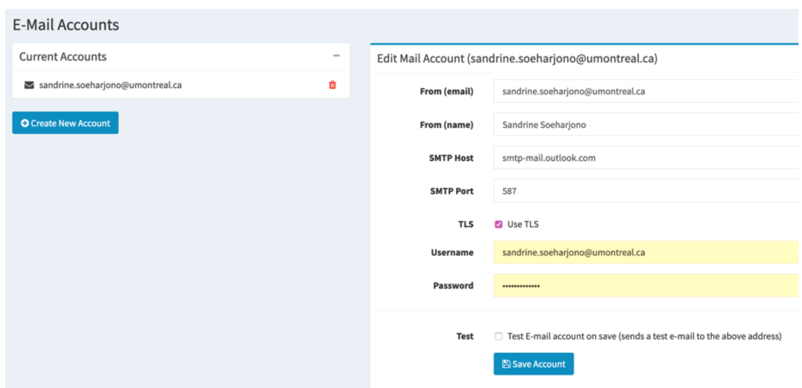
    c. If the following email and waiting time modules are in the correct order, that's it! All participants are officially in the run.
4. Track every anonymous user's…
    a. Progress through the USERS tab in the run
    b. Answers through the SHOW RESULTS or EXPORT RESULTS tab in the "main" survey section
    c. If you want to observe a specific user's progress/answers (or delete their answers, send them to a specific position, etc.), refer to the SHOW RESULTS tab for the "emails" survey section to find the participant's anonymous ID. This is your only link between randomized IDs and actual user identities; otherwise, the "main" survey's results will all appear anonymous.

Setting up your Mail Account

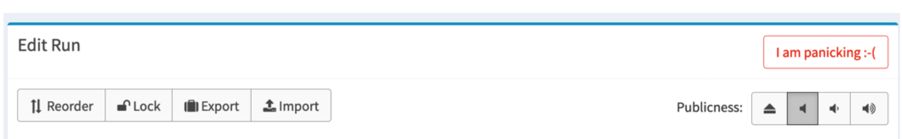
If you need to send any email invites or reminders, you will need to set up the account from which these will be sent out. This can be done through the top left section of the webpage, in the MAIL ACCOUNTS section.



You will be asked to fill out the following information and enter your password, so that formr may automatically use your account to send emails according to your run. You may choose to use multiple emails if desired (as every email module will specify from which email the wave is sent). Depending on your email account, information on the SMTP host, port and use of TLs will vary; you may contact your institution or easily look up tutorials for setting these up accordingly.

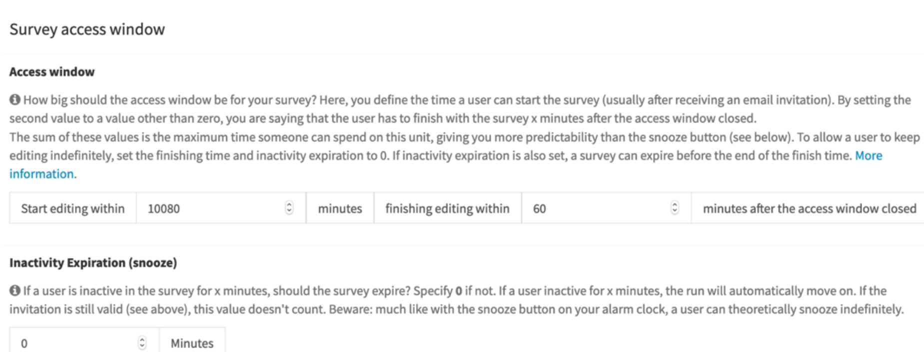


Other Details

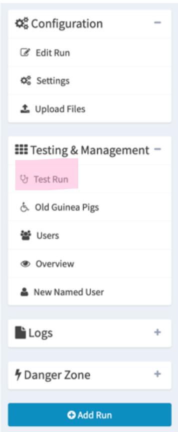


- On the top right side of your EDIT RUN section, you will see 4 options for Publicness: these allow you to choose how visible your run is to other people.
  - If you are not ready for anybody to see your run (or if you are done and do not want anybody accessing it anymore), select the first button;

   - If you only want people with an access code to view your run, select the second button;
   - If you want anybody with the link (your run's link; see **Starting Your Run** on p.10) to access your run, select the third button;
   - If you want anybody to access the run (such as if you were posting it online or didn't mind if people could find it using Google or another search engine), select the fourth button.
- If you started your run and see that things are going unexpectedly badly, press the red I AM PANICKING button to temporarily lock your run and allow you to fix issues.
- When testing out your survey(s), you might notice some text at the bottom of the page. It's quite easy to remove and/or modify; select the SETTINGS tab on the left panel of your run, and personalize your title, heading image, description, footer text and public blurb as you want.
- As you know, you can specify the length of waiting periods yourself in the actual run settings. When it comes to how long a participant may access your surveys, though, you will have to configure for each survey. Start by selecting your survey in the top panel, then select SETTINGS in the left panel. The SURVEY ACCESS WINDOW section will allow you to define limits for each participant (so that they typically eventually move onto the next module in your run instead of staying stuck at that module forever). Beware that the time is set in minutes by default!



Testing your Surveys/Runs

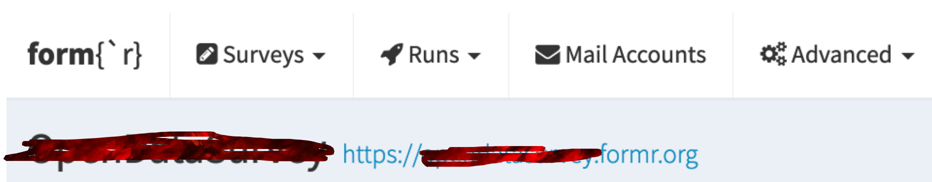


Before officially starting your run, you want to make sure it's perfect in every way. This may be time-consuming and frustrating but test your run out as often as needed on your own using the TEST RUN button on the left panel. I also highly recommend trying out the whole run on a few friends or colleagues (using the full run, as if they were real participants) and asking them to stop at various modules and/or answer differently to your survey(s) in order to test out its limits, track various potential outcomes and fix issues accordingly. You may track them using their session IDs and delete their progress/data in USERS when you start the real run.

If there is any last-minute detail or issue that isn't addressed in here or can't be found in the documentation online, you can contact the formr creators directly or submit a question on their wiki to obtain help from the community. Make sure that you are at ease with your run before you start it!

Starting Your Run

The start of your run will be through your run's link. On your run's configuration page, you will see your run's name and its link at the top of the page. It should resemble:



Your run's link will therefore be used to start the run for each participant, whether they click on it themselves (such as in examples #1 or #2) or you start it for them (such as example #3). Entering this link into one's browser will begin the run at the beginning (or wherever it was last left off, if this history is stored in your computer's cache… hence the importance of using a private browser (e.g. a new Incognito window in Google Chrome) if recreating an example like #3).

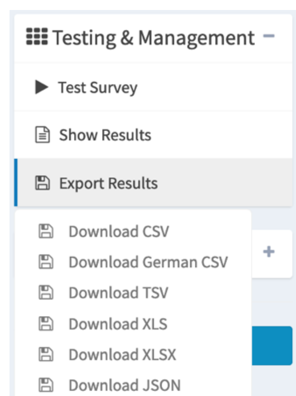
Tracking Your Participants Throughout the Run

As stated in **Run Design Methodology** (p.4), you may track each real user's progress and see where participants are currently placed through the USERS tab. This allows you to:

- See whether someone is stuck somewhere in your run;
- Observe if each waiting period ends when it should or if each email wave is sent according to plan;
- Change the participants' positions (bring them further down or back up the run) if needed;
- Manually send reminders if needed;
- Delete users (ex: duplicates, request to be removed, etc).

Make sure to set the right waiting times so that progress from one module to the next is made at a convenient pace for your study. It is easy to predict and fix most of these common mistakes in advance through test sessions.

Collecting Your Results



As stated in **Run Design Methodology** (p.4), you may track each user's answers through the SHOW RESULTS tab or analyze the answers through the EXPORT RESULTS tab of your survey's section by downloading them in the format you prefer.

The End

Ta da! You now know the basics for creating surveys and runs using formr; I hope this was helpful. Please refer to the online documentation, public forums or formr creators for more details. I'm no expert but this was the simplest way I could explain the basics of formr for a beginner. If anything about this homemade guide wasn't clear, do not hesitate to contact me at sandrinesoeharjono@hotmail.com. Good luck! ☺