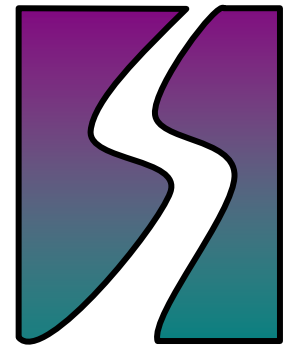


Development of Survey and Case Management facilities

For organisations with
minimal survey
infrastructure



Fred Wensing

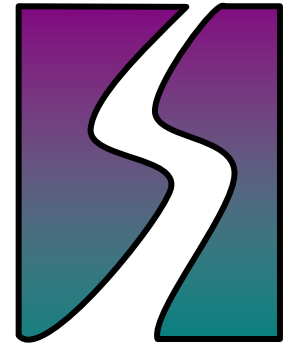
*Softscape
Solutions*

Presentation outline



- Typical situation
- Choice of tools
- Facilities needed
- System design
- Survey environment on the computer
- Description of facilities
- Demonstration

Typical situation



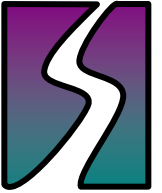
Typical situation



- Organisation wants to conduct a survey
- Want to use computer assisted interviewing
- Choose to use Blaise
- Arrange to develop a questionnaire

BUT

Typical situation (cont'd)



- They cannot run a survey just with a questionnaire
- Need survey and case management facilities
- Large survey organisations already have such infrastructure
- Smaller ones do not

Organisations involved

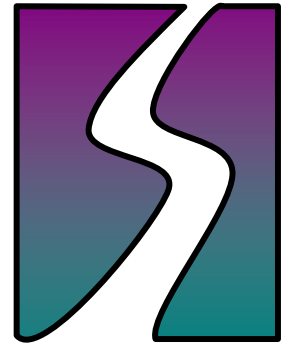


- Aust Department of Family Community Services and Indigenous Affairs
- Telethon Institute for Child Health Research
- New Zealand Ministry of Tourism

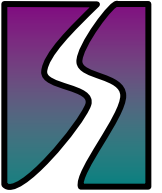
Their main business is not surveying

What to do?

Build it themselves ... but how?

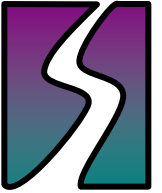


Choice of tools



- Blaise has tools that can be used to build a case management system
 - Maniplus
 - Blaise API (for use with other software)
 - Data Centre

Choice of tools (cont'd)



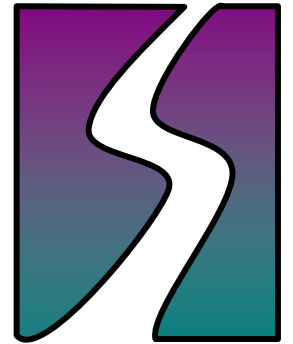
- **Maniplus**
 - Part of Blaise
 - Can readily access Blaise data
 - Relatively easy to program
- **Blaise API component**
 - Needs to be in conjunction with other software (eg. Visual Basic, C++ or .NET)
- **Blaise Data Centre**
 - Interactive management of Blaise data

Maniplus chosen

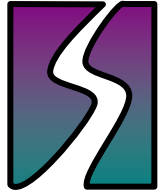
No other software needed

No specialist programmers needed

Low cost (part of Blaise)

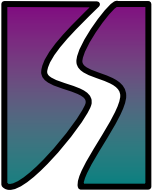


Facilities needed



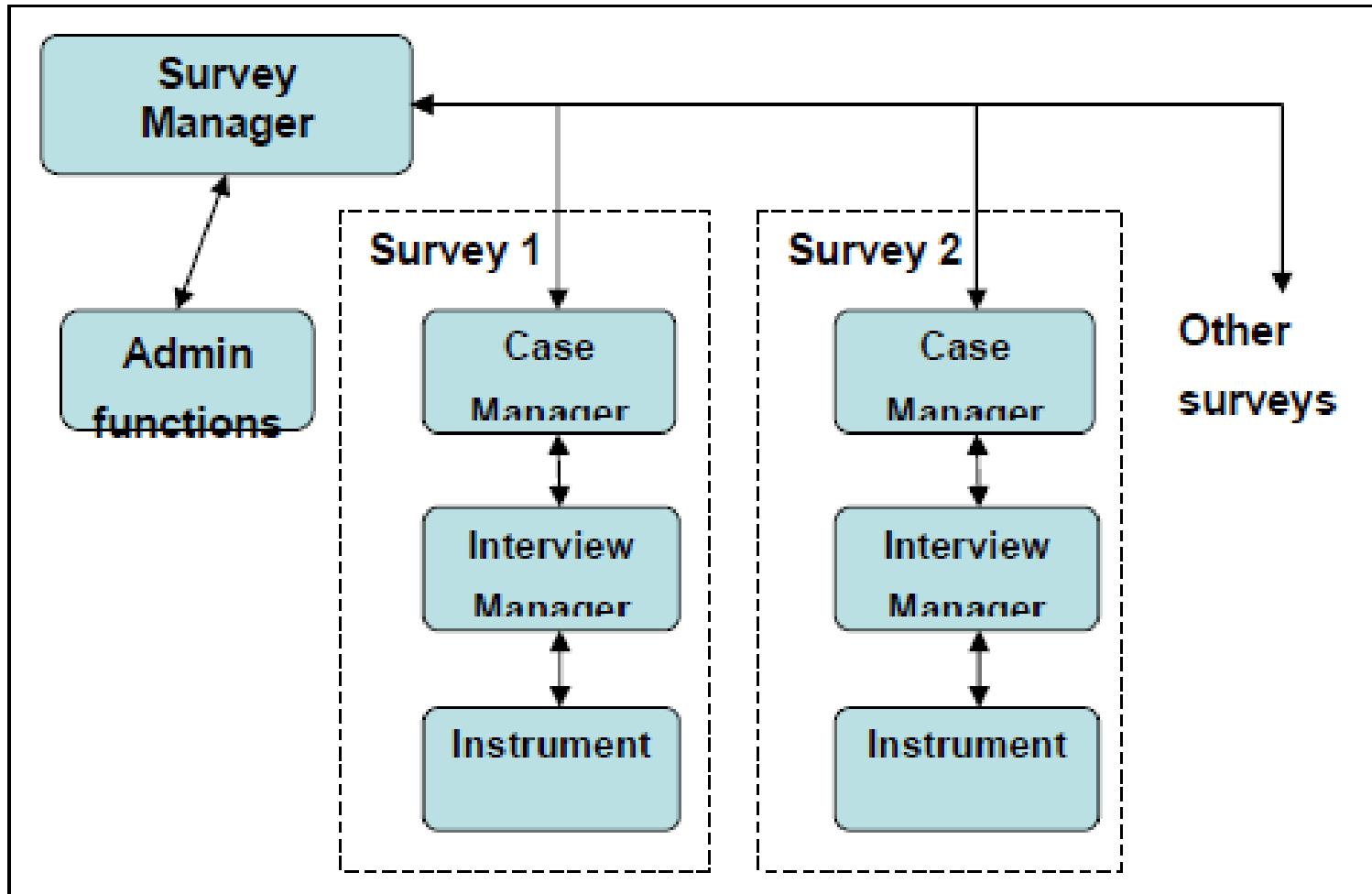
- Establishment of the survey environment
- Identification of the operator
- Installation and removal of surveys
- Display of current surveys
- Display of cases for the selected survey
- Management of the interview entry and exit
- Managing the status of cases
- Packing up of cases for return to the office

System design



- Three layers of management programs
 - Survey Management
 - Case management
 - Interview management

System design

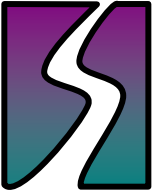


Survey environment (on notebook computer)



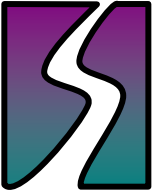
- Blaise - full install minus Blaise.exe
- Folder structure
 - Main folder for the system
 - All surveys under the same primary folder
 - Each survey (cycle) has its own folder
 - External folder for lookup files/coders
- Other – presumed present
 - Email
 - Security

Survey Manager application



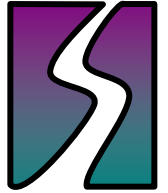
- Single start-up point
- User identification
- Survey/instrument installation
- List of available surveys (for selection)
- Buttons to start a survey session

Case Manager application



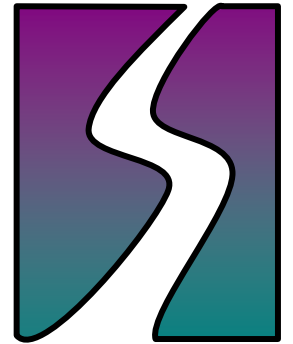
- Access a List of cases
- Operate on the list - load, remove, package
- Buttons to start an interview
- Management of the case records in the folder
 - Single file for all records
 - Separate file for each case

Interview Manager application



- Control the entry and exit from the interview
- Check the clean/dirty status of the record and inserts the status value into the data
- Handling of the setting of response status

Demonstration



END

Blaise! It's gonna last forever
For surveys and editing ways
Blaise! It's gonna be the solution
For collecting our data today

