Moving to Blaise IS

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Overview

• Background in Blaise IS
• Initial project requirements
• Challenges
• Solutions
• Lessons learned
• Conclusion
Background in Blaise IS

- Michigan well versed in CAPI, CATI
- Evaluation in 2005
- Re-evaluated 2009
- First study, Sunflower, 2010
Initial Project Requirements

- One source code – three platforms
- Secured data
- Integration with Surveytrak
- SQL database
- Process data with current utilities
- Producing web survey printed documentation
The Challenges …
Challenge - Written Specifications

- Current spec document meant for CATI/CAPI
- No written description to represent web elements
- Web user interface standards not defined
  - Button navigation
  - Tables, lists, drop downs, …
  - DK/RF, external lookup, actions
  - Header, logos, color
Challenge – Programming

- Global settings
- Rules changes
- Question Text
- Multimedia
- Modelib layouts
- Menu files (panels, buttons, actions)

- ASP files
- Stylesheet customizations
- Grouping (layout, field & label selection)
- Critical questions
Challenge – Servers

- Blaise IS Ports
- Blaise IS Services

**Blaise IS Ports**

**Blaise IS Services**

- The Server Park Service port is used by the Portal Server. This port will be used to manage the groups remotely with the Server Manager.
- The Portal Service port is used by the Portal Server. If the respondent starts the interview, the load balancer uses this port to determine on which Web Server the interview will run, and returns the corresponding URL to the browser of the respondent.

*11/3/2010 Moving to Blaise IS*
Challenge – Data Storage

- Data Server
- Data Roots
- SQL backend
- BOI data structure
- Minimize number of tables
- Username/password login
- Datamodel changes/migration
- Database “locks”
Challenge – Case Management

- Existing system (CAPI) integration
- Email jobs
- Suspend & resume interviews
- Reports
- Daily updates to Surveytrak
Challenge – Paradata

- Default journal not sufficient
- Javascript
- Blaise menu files
- SQL table storage
- ASP modification
Solutions
Solution - Written Specifications

- Current spec document updated to work with web mode
- Web user interface standards defined
  - Button navigation
  - Tables, lists, drop downs, …
  - DK/RF, external lookup, actions
  - Header, logos, color
Solution – Programming

- "Stem" text
- Menu modifications
- Variables
- Layouts
- Grouping

- ASP - login & paradata
- Stylesheets & HTML

![Survey interface diagram]

If you work primarily from a remote location or work at multiple locations, please answer the questions in this survey for the space you use most often when working in the Perry Building.

Please indicate to what extent you agree or disagree with the following statements about how the office layout and your workspace affects your ability to work with your functional team (e.g., TRG, PM, DCO, etc.) and project work team(s) (e.g., HRS, FISO, NCO, etc.). If a question does not apply to you, please mark "Not Applicable".

The general SRO office layout facilitates work with my functional team (e.g., TRG, PM, DCO, etc.).
The general SRO office layout facilitates work with my project work team(s) (e.g., HRS, FISO, NCO, etc.).
The location of my workspace facilitates work with my functional team supervisor.
The location of my workspace facilitates work with my project leader(s).
The location of my workspace is close to people I need to talk with in my job.
Solution – Servers

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Network Diagram

- Internet
- Firewall
- Private firewall
- DMZ
- Web server
- Blaise web server
- Blaise data server
- Blaise rules server
- Web Survey Respondent
- Developers
- Internal Testers
Solution – Data Storage

- SQL made management of the data easier & more accessible.
- Solid data structure (Stream, Flat No Blocks)
- Minimized storage size
- Maintained security to data
- Migration means exporting the data, removing & adding the survey, then reimporting the data.
- Stream data exported to BDB format
- Database “locks” unresolved
Solution – Case Management

- Integrated with existing system with data sharing
- Custom emailer programmer works well
- Suspend & resume works well
- Progress reports through existing case management system (Surveytrak)

C.f. BlaiseIS Sample Management [Peng, Wood, Cheung]
Solution – Paradata

• Default logging disabled
• Values stored down to the field level on a page captured, along with navigation actions.
• Simple modification to menu file
• New standards: SQL tables, ASP modification

• c.f. BlaiseIS Paradata [Ostergren, Liu]
Lessons learned

• Standards before implementation
• New systems require lead time
• Learning curve
• Each area has its own challenges
Conclusion

- Used new technology – SQL Server 2008, Blaise 4.8.1 & 4.8.2, …,
- Hardware/software setup challenges.

Future Directions

- Archiving procedures
- Browser compatibility
- Direct data access in SQL
- Update case management & reports
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