The road to a new questionnaire layout

Transition of a Blaise 4 web survey to Blaise 5
Getting started

– Received Blaise 5 - July 2015
  - Planned to go live January 2016
    • December 2015 – delivery of the questionnaires

– 3 Web surveys
  - Only CAWI, no other modes
    • Health survey
    • Transportation
    • Investments
Getting started - system

– No knowledge on how to get the questionnaires into Blaise 5

- Logistic and systems are part of the renewal project ‘Phoenix’ within CBS
- The questionnaires are made by the Data collection department

– At this point we don’t know yet what the questionnaire should look or behave like
Getting started - surveys

- Health survey
  - Social survey
  - Long questionnaire: 30 minutes

- Transport
  - Business survey (mandatory)
  - Master-Detail*
    - Complex structure where we create a relation of 1-to-N questionnaires
  - Uses a lot of matrixes*
    - * Combinations of different question types in a table form

- Investments
  - Business survey (mandatory)
  - Financial tables
  - Short survey
Getting started – Health survey

- Health survey
  - Code conversion with tool
    • Blaise 4
      • Layout in Blaise 4
        • Text colour, bold/italic
        • Layout of each different question (“field panes”)
    • Page breaks
    • Check if code works the same in Blaise 5
    • Work with sample data
CBS branding and layout

– CBS branding needed to be applied
  - Where possible, to fit into our company policy
    • At least we had something to start with

- Adjust the Blaise Resource File
  - Colours, Fonts
  - Headers, Previous/Next buttons

- Created the framework for all our questionnaires
CBS branding and layout

– Then decide for each question-type
  - How do we want to present
    • Input question, multiple choice, set question, etc.

– Layout team
  - Keeping in mind our branding
  - Learned lessons from the past
  - Methodological approaches
CBS branding and layout - Team

- Layout team
  - Builders, Survey designers and Methodologists
    - Not a lot of material on this topic
    - Experience from other companies
    - Not yet proven

- Comes down to applying ‘best of knowledge’
- A lot of opinions, but no ‘golden standard’
CBS branding and layout – requirements

- Focus on
  - PC / Tablet
    - not smartphone
      - Out of scope
      - ‘Should use an APP’
      - ‘Nobody fills in a survey on his phone’

- If possible no scrolling
- Apply lessons learned
Old layout – lessons learned

- Easy access
- Bigger font-size for better readability
- ‘Refreshing look’: compared to our current interface
CBS branding and layout - Team

- Question based information
  - Error & warning message
  - Help & Info text
    - Font, colour, bold, italic
  - Where to place them when using tables or matrixes?

- Question interaction
  - Selection frame
  - 3D buttons frames
Getting from layout to working reality

The schematics of the layout were setup
- Get it to work on all browsers
- Seeing how it looks
- And applying it to our questionnaires
- No field-tests possible
- Thin line between usability and layout
  - This needs continued attention during development
Old vs New
Old vs New

1. Intro text
2. Selection frame
3. Question text
4. Sub question text
5. Input field
Old vs New

De eerste vragen gaan over uw huishouden. 1

Uit hoeveel personen bestaat uw huishouden (uzelf meegerekend)? 3
Kinderen die niet op uw woonadres staan ingeschreven, moet u NIET tot het huishouden rekenen. 2

1 Introtext
- Larger font size
- Easier to read

2 Selection frame
- Questions are ‘highlighted’

3 Question
- Larger font size
- Easier to read

4 Sub question text
- Italic and other colour
- Easier to read

5 Input field
- Applied to the style
The current layout

De eerste vragen gaan over uw huishouden.

Uit hoeveel personen bestaat uw huishouden (uzelf meegerekend)?
Kinderen die niet op uw woonadres staan ingeschreven, moet u NIET tot het huishouden rekenen.

Bestaat uw huishouden uit:
Stiefkind, pachtkind e.d. tellen als kinderen
Kinderen die niet op uw woonadres staan ingeschreven, moet u NIET tot het huishouden rekenen.

- Echtpare / vaste partners met thuiswonend(e) kind(eren)
- Echtpare / vaste partners met thuiswonend(e) kind(eren) en met ander(en)
- Eén ouder met thuiswonend(e) kind(eren)
- Eén ouder met thuiswonend(e) kind(eren) en met ander(en)
- Een andere samenstelling

Volgende
Automation of our layout

Blaise 5 resource editor
- Rich but complex editor
- Change dependencies and consequences

‘Time to Market’
- Use naming-conventions to apply layout-automation
- Keep programmers out of resource editor
  - Supply them with a few adjustable parameters
- Standards on all surveys
Health Survey – Leading survey

– Meanwhile
  - Health Survey became the leading survey
    • Focus on finishing all the necessary layout types

– Multi User test results
  - Interface adjustments
  - Problems on some device types
    • Clickable areas around radio buttons
    • Tables that did not fit correctly on older tablets
    • Portrait view
Multi-layout

- Rethink multiple layout for different devices
  - PC / Tablet-landscape
  - Portrait
  - Smartphone

- How do we present some question types on a smaller device
Other devices – Tablet layout

Zou u op dit moment betaald werk willen hebben? Ook 1 uur per week of een korte periode telt al mee.

- Ja
- Nee
- Reeds gevonden
- Wil wel maar kan niet
- Geen antwoord

Vorige Volgende
Other devices – Tablet layout
Current status

- 2 Web surveys running (Health/ School leavers)
  - 3 more by end of this year

- Layout types for company surveys
  - Index list/ Financial balance / Master-Detail / Matrix

- Keep on working on our layout style
- Not able to do an experiment with it
  - Straight into production
  - May influence our future layout
Conclusion

• A lot of work
• No ‘one solution fits all’ scenario for question types
• Think about layout design and its consequences
• Multi-device layout
• Automation of layout in Blaise