

Using Blaise 5 to Solve Multimode and Multi-Device Challenges

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Agenda

Car Loan Demonstration
Survey



Overview of Survey Requirements
Management System
Testing
Layout Design
Conclusion

Overview of Survey Requirements

Car Loan Demonstration Survey



Overview of Survey Requirements

- ▶ Original project was paper only (PAPI)
- ▶ Web component (CAWI) with use of mobile devices added
- ▶ Look and feel needed to resemble PAPI as much as possible
- ▶ 508/WCAG 2.0 requirements needed to be adhered to
- ▶ Database SQL structure needed to be consistent between paper and web version

Overview of Survey Requirements

- ▶ Client provided specs for skips, flow and appearance including...
 - > A word.docx of the paper survey
 - > A file of all variable names and allowed values
 - > An on-line flow document with specifications for color, font, skip patterns, and management screens
 - > Graphic to be used in the header

Management System

Car Loan Demonstration Survey



Management System

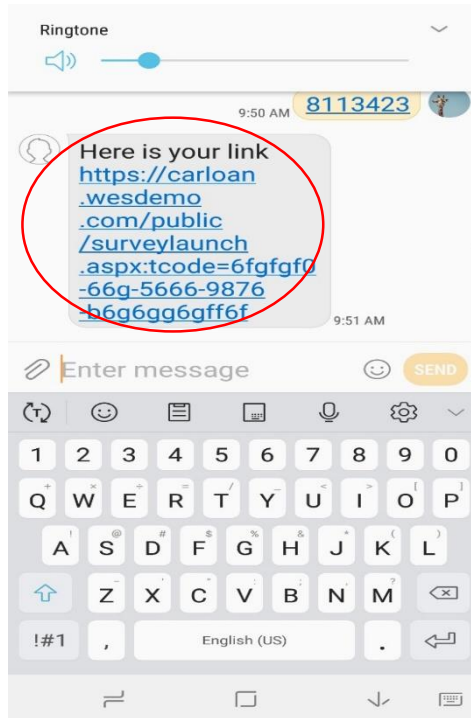
- ▶ Westat's management system known as M3 was used
- ▶ Managed sample, mail out and instrument launch
- ▶ Reminder letters sent if no response
- ▶ Device driven methods of login

Management System-CAWI instrument

- ▶ CAWI Instrument
 - > Multiple layout sets
 - » Small, Medium, Large
- ▶ Desktop login
 - > Types in URL and keys in provided id and pin number
- ▶ Mobile device login
 - > Text alternate key from mobile device
 - > Link to survey sent

Management System-Mobile device login

- ▶ Illustration of text link provided for mobile device login



Management of Testing

- ▶ Three layouts sets
- ▶ Multiple platforms
- ▶ 5 Browsers tested
 - > Desktop Windows
 - » Large layout
 - » IE, Chrome, Firefox, Opera
 - > Desktop MAC
 - » Large browser layout
 - » Safari, Chrome, Firefox, Opera Mini

Management of Testing

- ▶ Samsung Tablet
 - > Medium browser layout
 - > Web Explorer, Chrome ,Firefox, Opera Mini
- ▶ IPAD
 - > Medium browser layout
 - > Safari, Chrome ,Firefox, Opera Mini
- ▶ Samsung phone
 - > Small browser layout
 - > Web Explorer, Chrome, Firefox, Opera Mini

Management of Testing

- ▶ Iphone
 - > Small browser layout
 - > Safari, Chrome, Firefox, Opera Mini

Layout Design

Car Loan Demonstration Survey



Layout Design

- ▶ Master page designed to client's specifications
- ▶ Small layout does not use header due to space considerations
- ▶ Table layout used extensively but is problematic for phones without use of scrolling
- ▶ OptionButton table template used for large and medium layouts with modifications
- ▶ Following screens demonstrate text wrapping on large and medium layouts

Layout Design-Large Layout illustration

Car Loans

For assistance with the survey, call 1-800-555-1212.

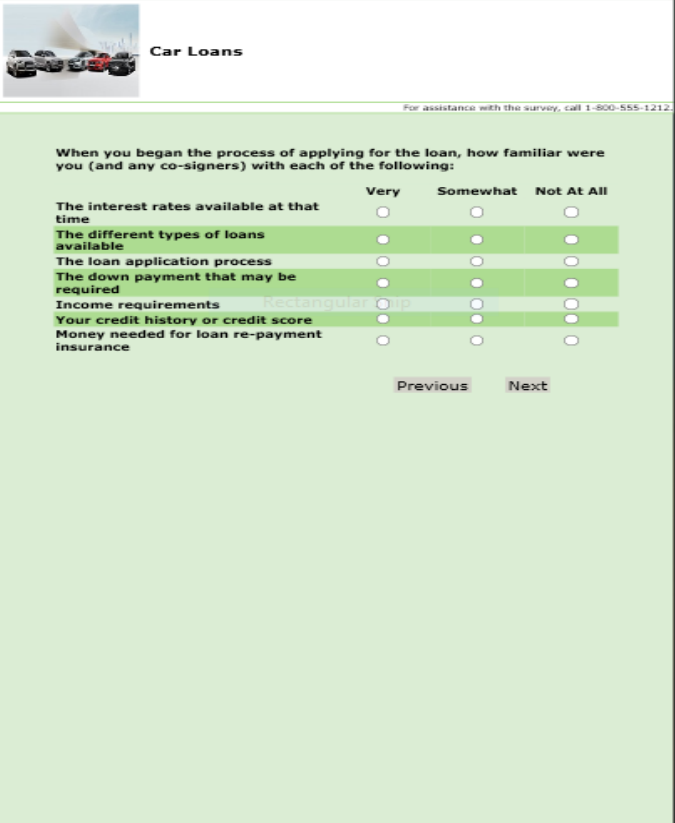
Rectangular Step

When you began the process of applying for the loan, how familiar were you (and any co-signers) with each of the following:

	Very	Somewhat	Not At All
The interest rates available at that time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The different types of loans available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The loan application process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The down payment that may be required	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Income requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your credit history or credit score	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Money needed for loan re-payment insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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Layout design –Medium layout illustration



Car Loans

For assistance with the survey, call 1-800-555-1212.

When you began the process of applying for the loan, how familiar were you (and any co-signers) with each of the following:

	Very	Somewhat	Not At All
The interest rates available at that time	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The different types of loans available	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The loan application process	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The down payment that may be required	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Income requirements	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Your credit history or credit score	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Money needed for loan re-payment insurance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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SAMSUNG

Layout Design-Small Layout

- ▶ For the small layout, each line asked individually
- ▶ A Role was used for Leaf and Stem questions
- ▶ Role was filled with stem question for each line
- ▶ First question in table the roles text was bolded
- ▶ Subsequent lines text not bolded

Layout Design -Layout Set-Small



Layout Design-Role Text

- ▶ Role Text also used by Screen Readers for 508/WCAG compliance

ScreenReaderText: RichText

```
Category.Field.GetRoleText('StemQuestionText') + '' +  
Category.Field.GetRoleText('Question') + '' +  
Category.Text
```

Type	Line	Col	Message
------	------	-----	---------

Constructs
IF...THEN...ELSE...ENDIF ▾ +

Functions
* ▾ +

Variables
Category ▾
Code ▾ +

OK Cancel

Layout Design

- ▶ Numeric fields with checkboxes on form for DK were collected as one field due to 508/WCAG requirements
- ▶ Required back end modification to be compatible with prior database structure
- ▶ Special Answer Category layout default not used to achieve checkbox rather than default radio button

Layout Design-Numeric field with Special Attribute Checkbox



Car Loans

For assistance with the survey, call 1-800-555-1212.

Your Loan

What was the dollar amount of your most recent car loan?
(Please enter numbers only, no commas or spaces.)

\$.00

Don't know

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Layout Design-Enumeration Response as Table

- ▶ Needed to replicate hardcopy presentation of enumeration question as table
- ▶ Layout entailed use of Roles
- ▶ Layout entailed multiple modified templates

Layout Design-Enumeration responses appearing as a table



Car Loans

For assistance with the survey, call 1-800-555-1212.

Suppose you were offered several possible lotteries, but you could choose only one. In each lottery, outcomes A and B are equally likely. Which one of these five lotteries would you prefer?

	Outcome A 50% chance	Outcome B 50% chance
<input type="radio"/> Lottery 1	Get \$42	Lose \$ 6
<input checked="" type="radio"/> Lottery 2	Get \$34	Lose \$ 2
<input type="radio"/> Lottery 3	Get \$26	Get \$ 2
<input checked="" type="radio"/> Lottery 4	Get \$18	Get \$ 6
<input type="radio"/> Lottery 5	Get \$10	Get \$10

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Layout Design-Demographic section

- ▶ Demographic section included many questions asked of both respondent and their spouse/partner
- ▶ A modified version of the Abreast template was used

Layout Design-demographic section



Car Loans

For assistance with the survey, call 1-800-555-1212.

Gender:

You

- Male
- Female

Spouse/
Partner

- Male
- Female

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Layout Design-Demographic section

► Gender without spouse/partner



Car Loans

For assistance with the survey, call 1-800-555-1212.

Gender:

- Male
- Female

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Conclusion

- ▶ Blaise 5 has a robust set of COTS templates that can be used as default layouts
- ▶ In some circumstances customized layouts are desired
- ▶ Modifications can be made to accommodate customizations
- ▶ When making modifications be aware of 508/WCAG requirements
- ▶ Thorough testing is recommended to avoid unintended consequences when changing templates



Thank you

Any Questions?