

# Challenges and Opportunities of Upgrading Surveys to Blaise 5

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Senior Blaise Developer

10 April 2025



# Background

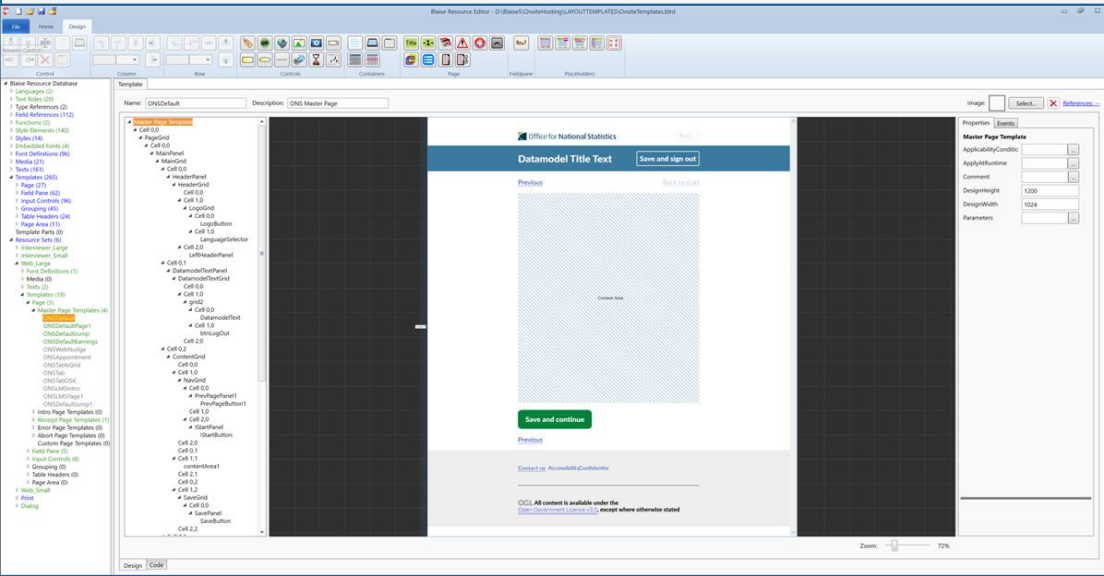
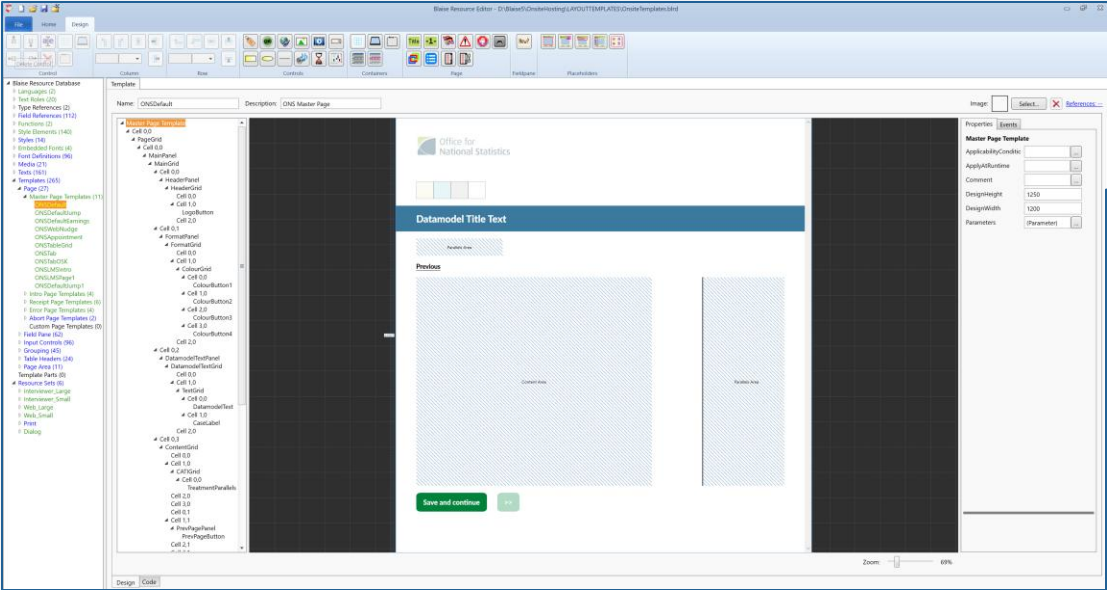
- Since 2018 ONS has been upgrading surveys to Blaise 5
- These include:
  - Opinions – mixed-mode CAWI and CATI
  - Transformed Labour Force Survey – mixed-mode CAWI and CATI
  - International Passenger Survey
  - Living Costs and Food Record of Spending
  - Various other ad-hoc surveys

# Challenges - Overview

- Understanding new features of Blaise 5
- Set up new hosting environments
- Impact on existing business processes
- Continuous development whilst maintaining business as usual

# Challenges upgrading to Blaise 5

- Resource database has made the biggest impact



# Challenges upgrading to Blaise 5

Opinions March 2018 Pilot

Forms Answer Navigate Options Extras Help

OPK1803a Information\_Sheet No\_Reply Engaged Appointment Ref\_usal Answering\_Machine Bits\_Bobs Others SEL\_Refusal SEL\_Others Recall\_Questions Admin\_Block Interviewer\_comments

**I would now like to ask how the people in your household are related to each other.**

Code relationship - JIMMY is JOAN's...

Treat relatives of Civil Partners as though the Civil Partners were married.

Also, treat relatives of cohabiting members of the household as though the cohabiting couple were married, including same sex couples.

- 1. Spouse
- 2. Cohabitee
- 3. Son/daughter (incl. adopted)
- 4. Step-son/daughter
- 5. Foster child
- 6. Son-in-law/daughter-in-law
- 7. Parent/guardian
- 8. Step-parent
- 9. Foster parent
- 10. Parent-in-law
- 11. Brother/sister (incl. adopted)
- 12. Step-brother/sister
- 13. Foster brother/sister
- 14. Brother/sister-in-law
- 15. Grand-child
- 16. Grand-parent
- 17. Other relative
- 18. Other non-relative
- 20. Civil Partner
- 99. (Office use only)

	NameRel	R[1]	R[2]	R[3]	R[4]	R[5]	R[6]	R[7]	R[8]	R[9]	R[10]	R[11]	R[12]	R[13]	R[14]	R[15]	R[16]
QAskRel[1]	JOE																
QAskRel[2]	JOAN		1														
QAskRel[3]	JIMMY		3	3													
QAskRel[4]																	

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**Opinions and Lifestyle Study** Save and sign out

[Previous](#)

**About your household.**  
Enter your details

**Person 1**

**My Title**

**My First or Given name**

**My Surname or Family Name**

Save and continue

[Previous](#)

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# Challenges upgrading to Blaise 5

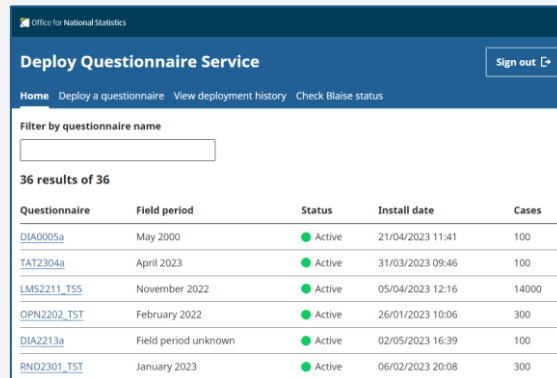
- Impact on existing business processing environment
  - Legacy applications developed over decades primarily written in Visual Basic 6
  - Integration into processes of several business areas e.g. Research teams survey deployment, Blaise support, IT development of back-end systems and user interfaces
  - Implementation of web collection with Blaise 5 brought new questionnaire functionality requirements

# Opportunities - Overview

- Review and improve existing business processes
- Revisit Blaise questionnaire standards
- Implement standard structure to questionnaires

# Improve existing business processes

- Review survey requirements and implement efficiencies e.g. outcomes from incoming respondent calls incorporated into main survey questionnaire
- User interaction with new processes. IT built Deploy Questionnaire and CATI interface tools



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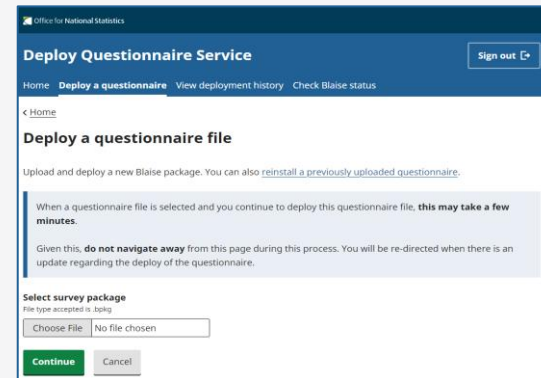
### Deploy Questionnaire Service

Home Deploy a questionnaire View deployment history Check Blaise status

Filter by questionnaire name

36 results of 36

Questionnaire	Field period	Status	Install date	Cases
<a href="#">DIA0005a</a>	May 2000	Active	21/04/2023 11:41	100
<a href="#">TAT2304a</a>	April 2023	Active	31/03/2023 09:46	100
<a href="#">LMS2211_T55</a>	November 2022	Active	05/04/2023 12:16	14000
<a href="#">OPN2202_TST</a>	February 2022	Active	26/01/2023 10:06	300
<a href="#">DIA2213a</a>	Field period unknown	Active	02/05/2023 16:39	100
<a href="#">RND2301_TST</a>	January 2023	Active	06/02/2023 20:08	300



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### Deploy Questionnaire Service

Home Deploy a questionnaire View deployment history Check Blaise status

Deploy a questionnaire file

Upload and deploy a new Blaise package. You can also [reinstall a previously uploaded questionnaire](#).

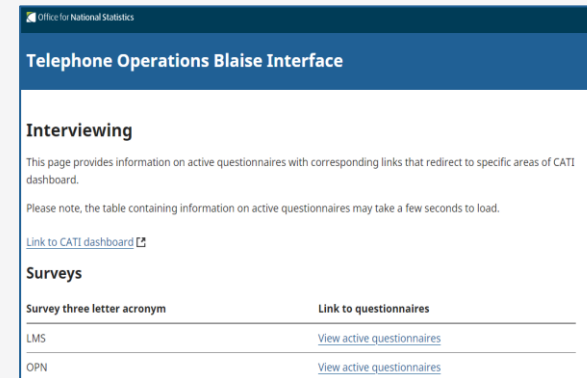
When a questionnaire file is selected and you continue to deploy this questionnaire file, **this may take a few minutes**.

Given this, **do not navigate away** from this page during this process. You will be re-directed when there is an update regarding the deploy of the questionnaire.

Select survey package  
File type accepted is .bpkg

Choose File No file chosen

Continue Cancel



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### Telephone Operations Blaise Interface

#### Interviewing

This page provides information on active questionnaires with corresponding links that redirect to specific areas of CATI dashboard.

Please note, the table containing information on active questionnaires may take a few seconds to load.

[Link to CATI dashboard](#)

#### Surveys

Survey three letter acronym	Link to questionnaires
LMS	<a href="#">View active questionnaires</a>
OPN	<a href="#">View active questionnaires</a>

# Questionnaire standards

- Introduction of web data collection drove the move away from the traditional Blaise 4.8 grid display used in our traditional interviewer led surveys

Opinions March 2018 Pilot

Forms Answer Navigate Options Extras Help

OPX1803a Information\_Sheet No\_Reply Engaged Appointment Ref\_usal Answering\_Machine Bits\_Bobs Others SEL\_Refusal SEL\_Others Recal\_Questions Admin\_Block Interviewer\_comments

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8. Step-parent
  17. Other relative

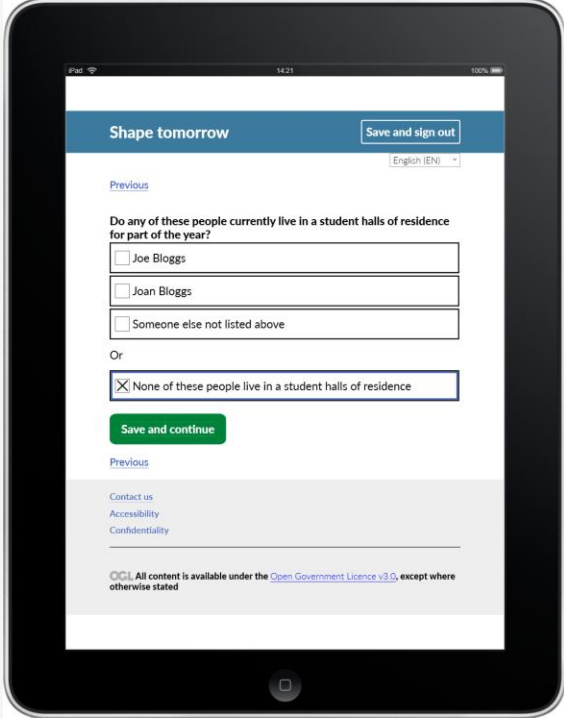
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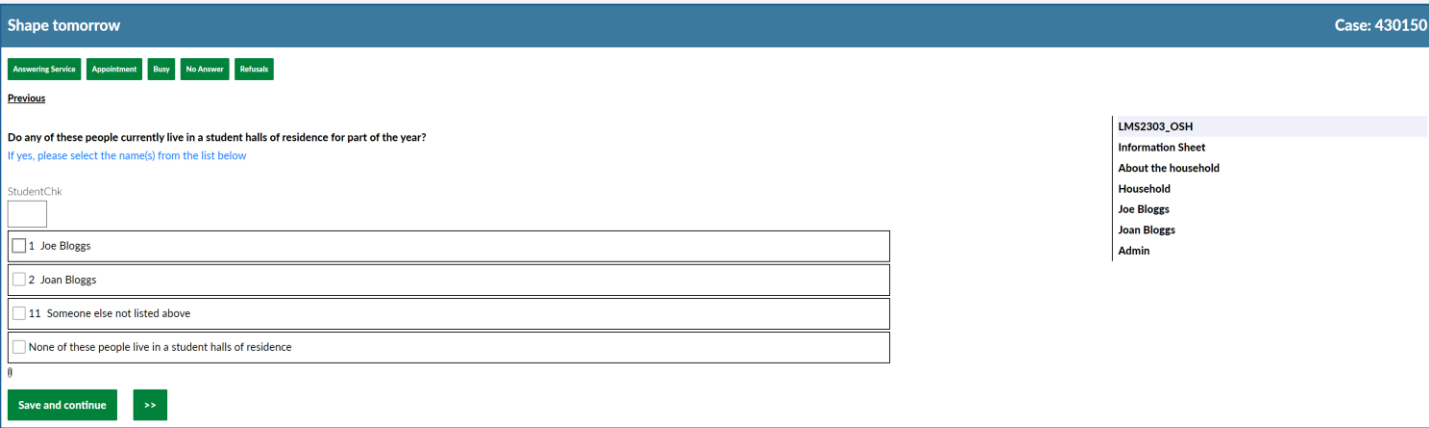
- The look and feel of web questionnaires had to meet ONS design standards
- These standards were extended to CATI and CAPI questionnaires, with additional functionality provided
- Time was taken to investigate ways in which Blaise 5 could be used efficiently to apply standards e.g. user-defined types

# Questionnaire standards



← Web

Phone →



# Standard structure to surveys

- Section 1 – Household details

Shape tomorrow

Answering Service Appointment Busy No Answer Refusals

Previous

Please enter your details  
[ASK OR RECORD](#)

Person 1

Can I have your first name please?

FstNm

Joe

0

And any middle names?

MidNm

0

And lastly your surname?

SurNm

Bloggs

0

And (can I just check) what is your sex? Is it...

[Code first that applies](#)

Sex

1 Male, or

2 Female?

0

Save and continue >>

LMS2303\_OSH  
Information Sheet  
About the household  
Admin

# Standard structure to surveys

- Section 2 – Individual section launcher

Shape tomorrow Case: 430070

Answering Service Appointment Busy No Answer Refusals

[Previous](#)

I would now like to ask you some questions of each individual in the household.  
An adult should answer on behalf of anyone aged 15 or younger.

Joe Bloggs	Start Survey	⚠
Joan Bloggs	Refused	↺
Jimmy Bloggs	Start Survey	⚠

LMS2303\_OSH

Information Sheet

About the household

Household

Joe Bloggs

Joan Bloggs

Jimmy Bloggs

Admin

# Standard structure to surveys

- Section 2 – Individual section launcher targeting one sampled person

**Opinions and Lifestyle Study**

We would now like to ask you some questions about your feelings on certain parts of your life. There are no right or wrong answers.

[Save and continue](#)

# Standard structure to surveys

- Section 3 – Individual details and topic questions

Shape tomorrow

Answering Service Appointment Busy No Answer Refusals

Previous

On which of the following days did you do any work in your job or business?  
Check that R has considered whether they did any paid work Saturday and Sunday.  
For self-employed people, include days where any activities that -- lead to potential profit, even if currently unpaid.  
Ask or record - prompt if necessary

WhichDays18  
1-2-3-4-5

1 Monday 8th May

2 Tuesday 9th May

3 Wednesday 10th May

4 Thursday 11th May

5 Friday 12th May

6 Saturday 13th May

7 Sunday 14th May

Or

Did not work that week

})

Save and continue >>

LMS2303\_OSH  
Information Sheet  
About the household  
Household  
Joe Bloggs  
Admin

# In Development and Future Plans

- Accessibility
- Uplift remaining surveys from Blaise 4.8 to Blaise 5
- Re-usable standards for all surveys
- Single database for mixed-mode collection
- Multi-mode dashboard

Any questions?