Development of Survey and Case Management facilities
For organisations with minimal survey infrastructure

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