



# Moving to Blaise IS

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# Overview

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



# Background in Blaise IS

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



# Initial Project Requirements

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- One source code – three platforms
- Secured data
- Integration with Surveytrak
- SQL database
- Process data with current utilities
- Producing web survey printed documentation



# The Challenges ...

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# Challenge - Written Specifications

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- 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

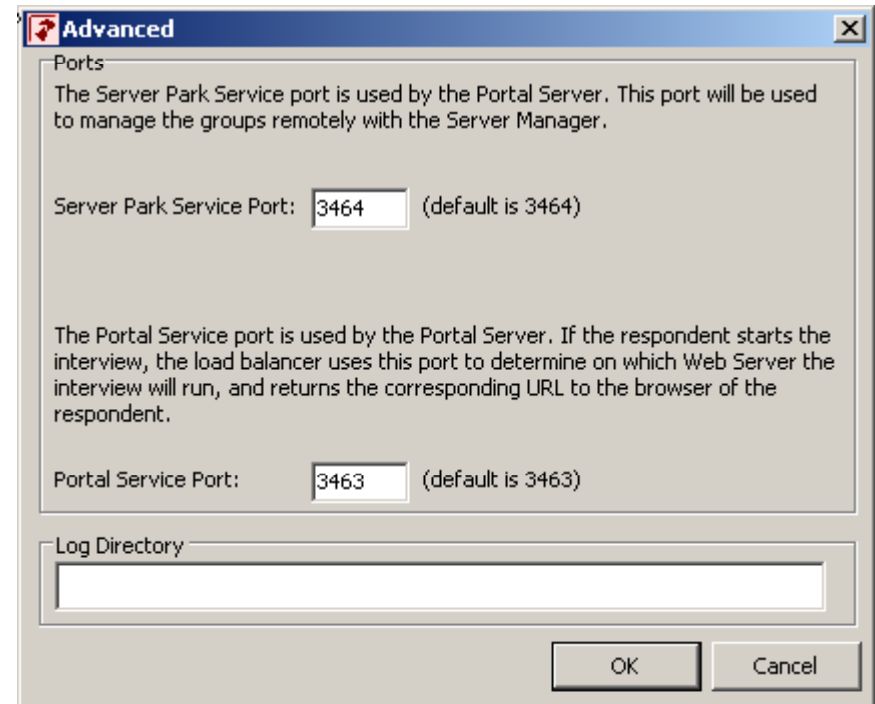
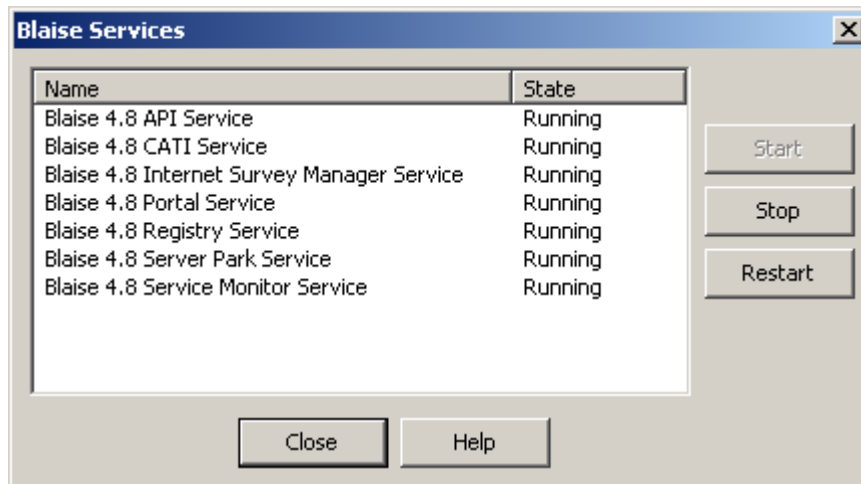
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- Global settings
- Rules changes
- Question Text
- Multimedia
- Modelib layouts
- Menu files (panels, buttons, actions)
- ASP files
- Stylesheet customizations
- Grouping (layout, field & label selection)
- Critical questions



# Challenge – Servers

- Blaise IS Ports
- Blaise IS Services



# Challenge – Data Storage

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



# Challenge – Case Management

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



# Challenge – Paradata

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- Default journal not sufficient
- Javascript
- Blaise menu files
- SQL table storage
- ASP modification



# Solutions

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# Solution - Written Specifications

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- 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

The screenshot shows a web browser window titled "SRO Space and Orientation Survey". The header is blue and contains the following elements:

- Logo:** A small image of a building on the left.
- Survey Title:** "SRO Work Environment and Orientation Experience Survey" in the center.
- Contact info:** "Email for help" and "1-800-631-2819" on the right.

Below the header, there is a paragraph of text (Stem text) that reads: "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., TSG, PDMG, DCO, etc.) and project work team(s) (e.g., HRS, PSID, NCS, etc.). If a question does not apply to you, please mark 'Not Applicable'."

Below the text is a **Question Grid** with the following structure:

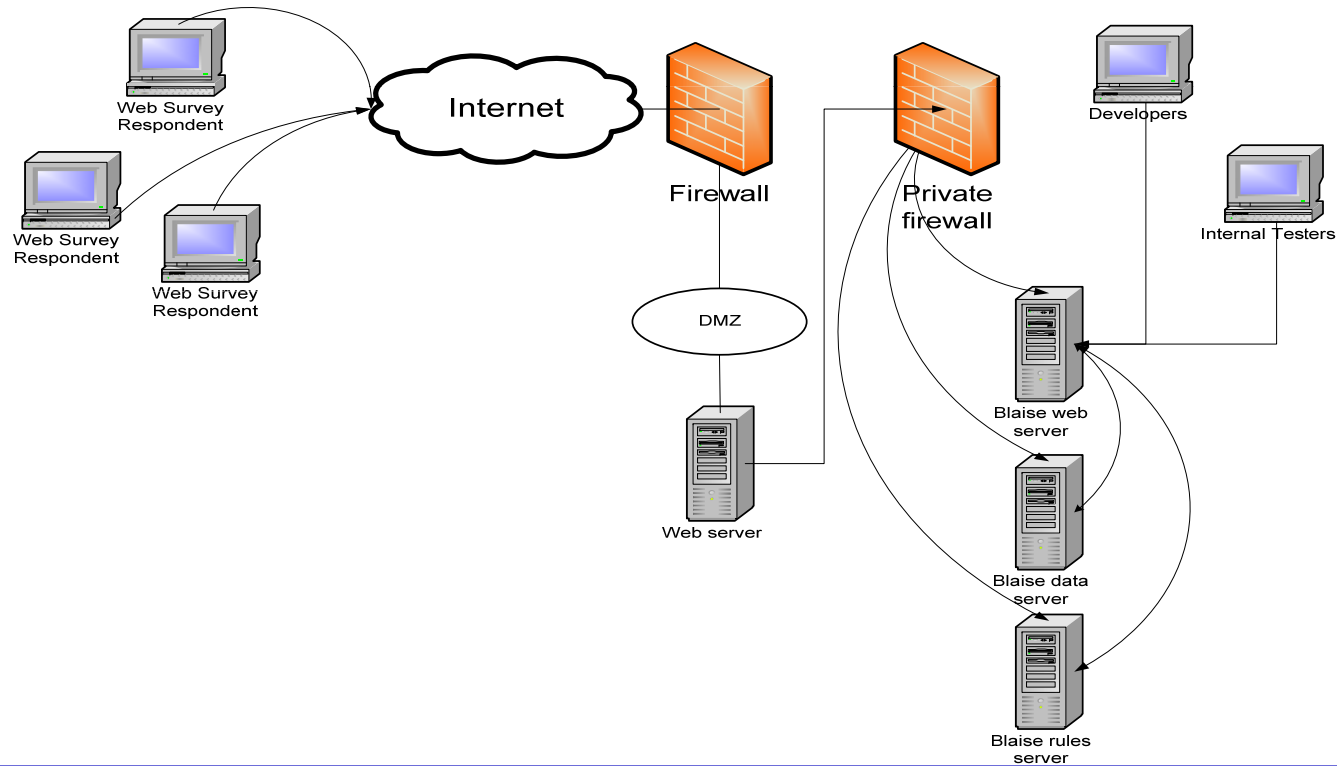
	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree	Not Applicable
The general SRO office layout facilitates work with my functional team (e.g., TSG, PDMG, DCO, etc.).	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The general SRO office layout facilitates work with my project work team(s) (e.g., HRS, PSID, NCS, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The location of my workspace facilitates work with my functional team supervisor.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The location of my workspace facilitates work with my project leader(s).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The location of my workspace is close to people I need to talk with in my job.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

At the bottom of the survey, there are **Navigation Buttons**: "Next >" and "< Back".



# Solution – Servers

## University of Michigan Network Diagram



# Solution – Data Storage

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- 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

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- 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

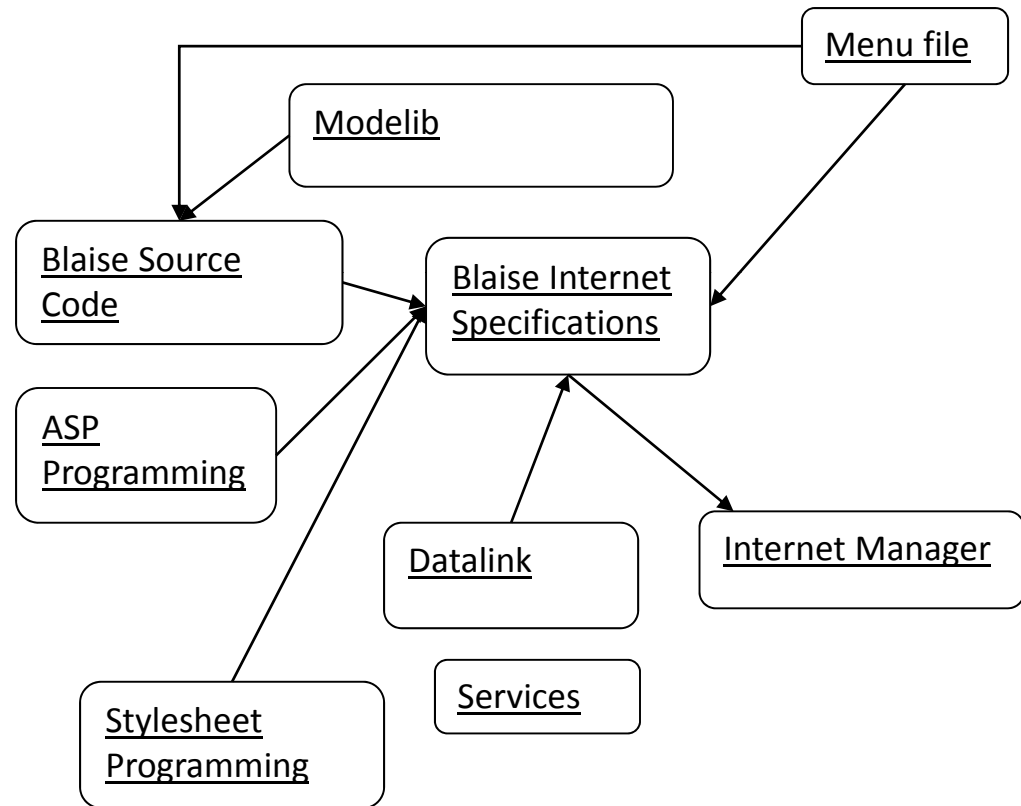
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- Default logging disabled
- Values stored down to the field level on a page captured, along with navigation actions.
- Simple modification to menu file
- New standards: SQL tables, ASP modification
- c.f. *BlaiseIS Paradata* [Ostergren, Liu]



# Lessons learned

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



# Conclusion

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- 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



# Contact Information

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