



Blaise Services At Westat Technical Notes Publication

Technical Note on Bypassing the Default Appointment Block

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Technical Notes are intended to facilitate the sharing of useful technical information about issues and solutions concerning the use of Blaise for CATI. These notes arise from our Blaise work and we believe they may be of use in other situations. The ideas contained in this Technical Note may or may not be appropriate for your specific needs. We invite users to submit (to blaise@westat.com) relevant issues, resolutions, or questions related to this Technical Note.

This Technical Note documents how to bypass the default appointment block in Blaise CATI. In the following, menu selection choices are in italics. This document supplements material found in chapters 10 and 11 of the Blaise Developer's Guide.

Overview

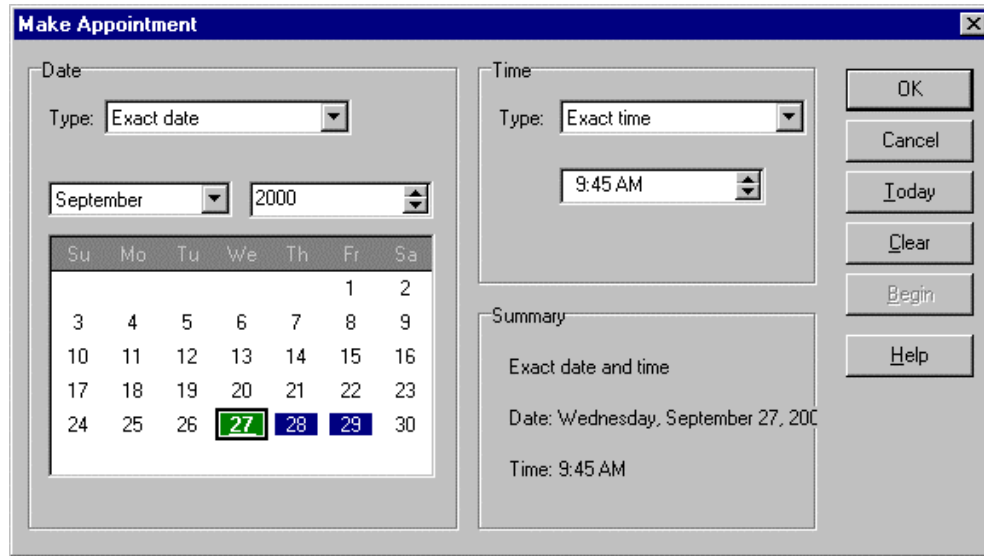
Any Blaise instrument that uses Blaise CATI must have two different appointment blocks, the default appointment block and the user-defined appointment block. The default appointment block is automatically included by Blaise in the instrument at prepare time if the `Inherit CATI` instruction is present in the source code. The default appointment block is called *CatiAppoint* and is nested directly below the *CatiMana* block. It contains seven fields; *AppointType*, *DateStart*, *TimeStart*, *DateEnd*, *TimeEnd*, *WeekDays* and *WhoMade*.

The user-defined appointment block is defined by the programmer and can have any name and one or more fields. It must be defined as a parallel block. Sometimes a minimal user-defined appointment block is used that contains just one field for case-level management notes that are then made available to a subsequent interviewer.

Default Interviewing Situation

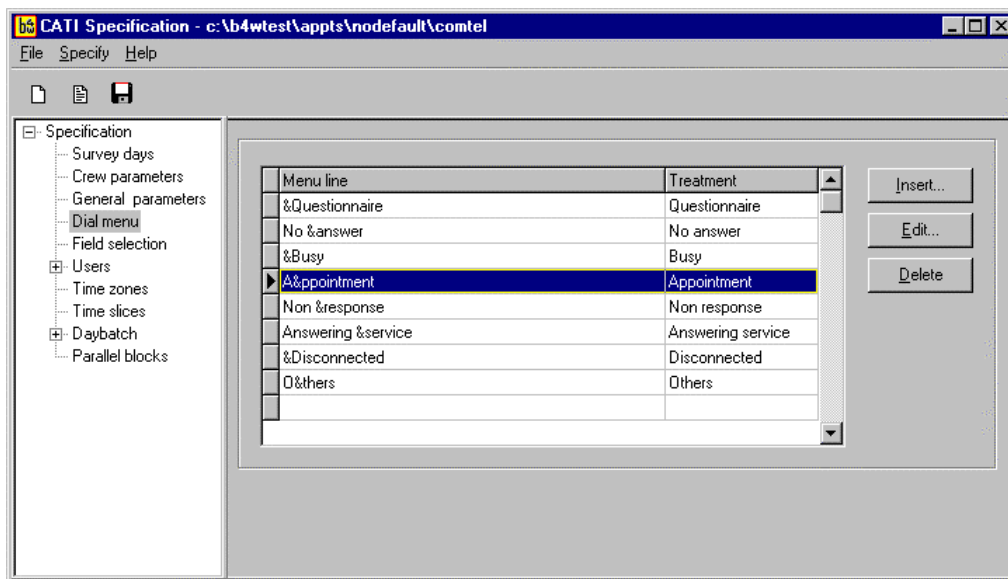
In the default interviewing situation, when an interviewer opts to make an appointment either from the dial screen or from within the data entry program (DEP) itself, the default appointment dialog appears, as shown below. After the interviewer specifies an appointment in the appointment dialog and clicks on the *OK* button, the user-defined appointment block appears. At this point the interviewer cannot navigate

back to the default appointment block. Once the interviewer navigates through the user-defined appointment block, Blaise automatically exits the case.



Appointment Block Specification in BtSpec in order to use the Default Appointment Dialog

In the *Parallel blocks* branch of the associated CATI specification file for the default interviewing situation, the user-defined appointment block must be given the appointment treatment. Also the *Disable appointment dialog* check box in the DEP must not be checked. As shown below, if interviewers are going to be allowed to go directly to the appointment block from the dial screen, the *Dial menu* branch of the CATI specification file should contain an appointment menu item that is given the appointment treatment.



Reasons to Disable the Default Appointment Dialog

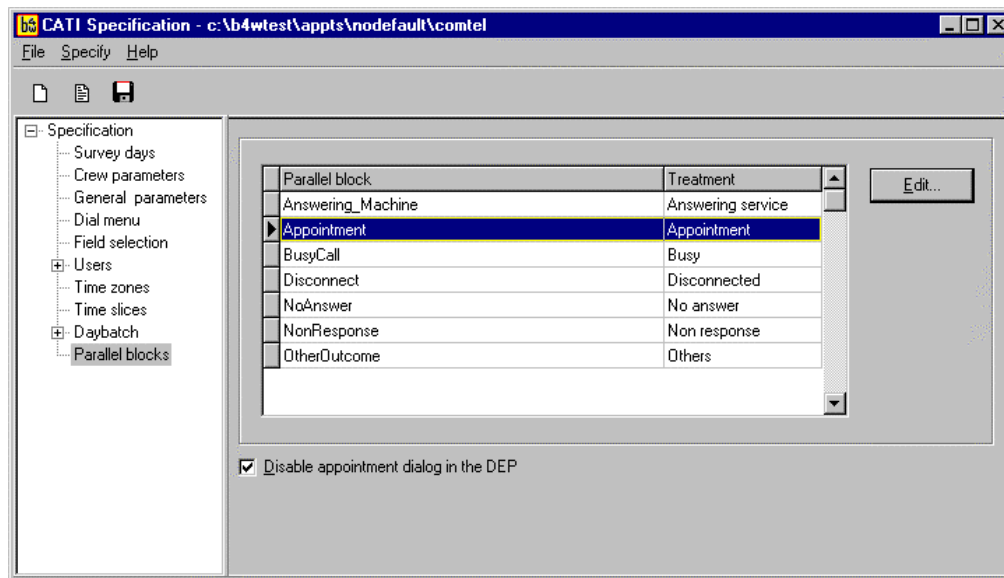
Most Blaise CATI users find the default appointment dialog satisfactory since it offers a number of different types of appointments and contains built-in edit checks that only allow appointments to be made in accordance with the time and date settings in the CATI specification file. However, in a particular survey you may wish to bypass the default appointment dialog in order to restrict the times, dates and appointment types for all or some cases to a greater degree than the default situation provided by Blaise. In addition, you may wish to bypass the default appointment dialog in order to script specific text for the interviewers to use for appointments or to allow the interviewers to set appointments of the form “one day later” or “one hour later”.

You must not use an user-defined appointment block to generate an appointment type that is not available in the *CatiAppoint* block or to access dates and times that are not covered in the specification file. For example, the Blaise scheduler does not recognize an appointment that includes two separate non-overlapping time ranges. The Blaise scheduler stops and does not complete the daybatch when it comes across an appointment for a date or time that does not fit within the dates and times (appropriately adjusted for time zones) set in the current specification file.

If you disable the appointment dialog, you must write directly to the *CatiAppoint* block to ensure that appointments made in the instruments-specific appointment block are honored by the Blaise call scheduler.

Using Only the User-Defined Appointment Block

To bypass the default appointment dialog, make sure that the user-defined appointment block is given appointment treatment and that the *Disable appointment dialog* in the DEP box is checked in the *Parallel blocks* branch of the associated CATI specification file (see below). You must also make sure that user-defined appointment block collects all the desired appointment-related information.



Writing Directly into the CatiAppoint Block

When you use the default appointment dialog, Blaise automatically writes the information collected into the *CatiAppoint* block. If an user-defined appointment block (that has the appointment treatment) is used without the default appointment dialog, Blaise automatically assigns a Dial Result of appointment in the *CatiMana.CatiCall.RegCalls[1].DialResult* field and sets *CatiMana.CatiAppoint.AppointType* to *NoPreference* and *CatiMana.CatiAppoint.WhoMade* to the string (normally the interviewer's name) entered in the registry for BlaiseUser in the HKEY_CURRENT_USER\Environment subfolder. It does not, however, write any information into the other fields in the *CatiAppoint* block.

If you want to change the appointment type or user and/or include information in any of the other *CatiAppoint* fields, you need to include code in the source code that explicitly writes into the *CatiAppoint* block. You can include these lines of code in the user-defined appointment block or at the data model level. Normally execution of these lines of code would be contingent upon the interviewer filling in a special field that indicated that all the appointment-related information had been successfully obtained. As an example, you could include the following code at the datamodel level, in which the fields *ApptDone*, *StartDate* and *TimeStart* are defined in the appoint block:

```
IF Appt.ApptDone = Yes THEN
  CatiMana.CatiAppoint.AppointType := Appt.CertainDate
  CatiMana.CatiAppoint.DateStart := Appt.StartDate
  CatiMana.CatiAppoint.TimeStart := Appt.TimeStart
ENDIF
```

If you allow *DayOfWeek* appointment types, you must write each possible set into the *CatiAppoint* block individually. As an example if the *DayOfWeek* field contains a set with two elements (i.e. its cardinality equals 2) and that two elements happen to be Monday and Tuesday, your code could be:

```
IF (Monday IN Appt.DayOfWeek) AND (Tuesday IN Appt.DayOfWeek) AND
  (Appt.DayOfWeek.CARDINAL = 2) THEN
  CatiMana.CatiAppoint.WeekDays := [Monday, Tuesday]
ENDIF
```

Be sure to include code in the user-defined appointment block that includes error checking consistent with the settings in the CATI specification file. For example, if Sundays are never set as interviewing days in the CATI specification file, you need to make sure that a Sunday is never allowed as an appointment date in the user-defined appointment block.