



Blaise Services At Westat Technical Notes Publication

Technical Note on Using Time Zones

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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 explains time zones concepts and how this feature is used in Blaise. 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

If time zones are properly defined in the CATI specification file and properly specified for each case in the database, Blaise CATI automatically adjusts times as required to reflect time zone differences.

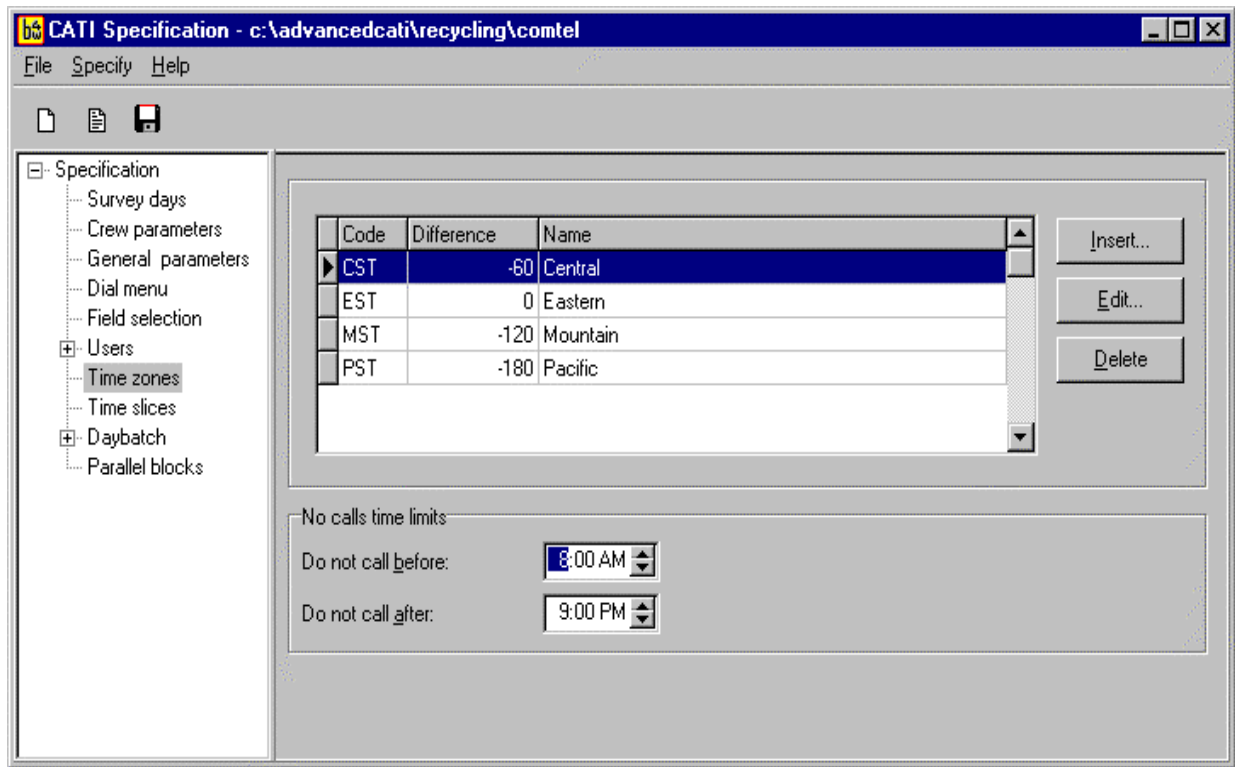
Respondent Time and Interviewer Time

To understand how time zones are handled, it is useful to think in terms of interviewer time and respondent time. Interviewer time is the relevant time expressed in the interviewer's time zone, while respondent time is the relevant time expressed in the respondent's time zone. Appointments are made in respondent time and stored in the *CatiMana.CatiAppoint* block in the database in respondent time. The times stored in *CatiMana.CatiSlices* and *CatiMana.CatiCall.RegCalls* are also in respondent time. However, all management-kind of information made available to supervisors about a case through *BtMana* and *BtHist* is in interviewer time. In addition when an interviewer selects the Zoom button to get case status information, all the times, including appointment times, are in interviewer time.

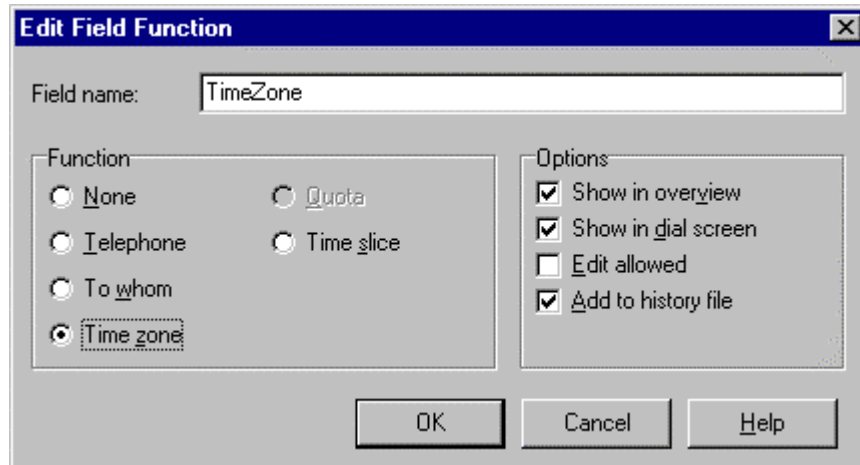
If you are not using the default appointment block but writing directly into the *CatiMana.CatiAppoint* block, you need to express the appointment time in respondent time (See Blaise CATI Technical Note 4). It is also worth noting that the dial time recorded in *CatiMana.CatiCall.RegCalls[1-5].DialTime* reflects the system time on the interviewer's workstation. If this time does not make sense it is because of problems with the system time on the interviewer's workstation, not because of time zone adjustments

Setting Times Zones

To use time zones in a CATI survey, define each time zone in the associated CATI specification file. In the screen shot below, four different time zones are defined and subsequently referenced throughout this paper. All the differences are expressed in minutes and are relative to interviewer time. For example, PST is 3 hours (180 minutes) behind interviewer time. Interviewer time is the same as EST because there is zero difference.



Time zones are not applied unless in the CATI specification file you give time zone functionality to a string field in the datamodel. Usually you define a 3-character string field specifically for this task. To do so, select the *Field Selection* sub-branch in the CATI specification file, click on the *Insert* button and select a field (not shown here). Next click on the *Edit* button and the *Edit Field Function* dialog box appears. Finally, select the *Time zone* radio button. In the screen shot below, the user-defined field *TimeZone* has been given time zone functionality. Since all three display options are checked, the *TimeZone* field will appear in the Forms overview shown in *BtMana*, on the dial screen and in the history file.



For each case in the database, you should assign one of the code values given in the CATI specification file to the field with time zone functionality. You can do this when you use Manipula to read in the data or to run standard maintenance routines. You can also do this in the rules section in the data entry program. Often in the United States an external file, which associates telephone exchanges with time zones, is referenced in order to fill in the time zone field correctly. Moreover, as mentioned above, if the field with time zone functionality appears as an editable field on the dial screen, interviewers can use the dial screen to set or change the time zone.

For a given case, if the field with time zone functionality is empty or contains a value not defined in the CATI specification file, the Blaise scheduler makes no time zone adjustment for the case. This means that the interviewer time zone is applied by default.

Do Not Call Before and Do Not Call After

Except for hard and supervisory appointments, the Blaise scheduler always honors the times in the *do not call before* and *do not call after* fields in the *Time zones* sub-branch of the CATI specification file. This is the case even if no field has been assigned time zone functionality. Using the example presented above, application of the *do not call before* limit means that no default, soft or medium PST cases can be delivered until noon interviewer time. Application of the *do not call after* limit means that even if interviewers work until midnight, no default, soft or medium EST cases can be delivered after 9 PM interviewer time.

Blaise allows interviewers to make soft appointments that include times outside the *do not call* limits. For example, an interviewer can make a soft appointment for a PST case of Mondays between 6 AM and 9 AM. However as long as the *do not call before* limit remains at 8 AM, this case is only active in the daybatch between 11AM and 12 N EST or interviewer time.

Time Slices

Blaise automatically makes time zone adjustments for time slices. Hence, to fit an 8 AM to 10 AM time slice, PST cases are delivered between 11 AM and 1 PM EST or interviewer time.

Daylight Savings

If all areas in all time zones involved in a survey go on to or off of daylight savings at the same time, no daylight savings kind of adjustment needs to be made because the difference between interviewer time and respondent time remains the same throughout the year. However, special adjustments need to be made if parts or all of a given time zone do not change along with all the other time zones. One possible way of handling the fact that a few areas (that can be defined by telephone exchange) in the United States never go on daylight savings time is to change the time zone associated with these areas, once in the spring and once in the fall, so that the difference between interviewer and respondent time is accurately reflected year around. Third party phone exchange files are available that indicate time zone differences and daylight savings adjustments at the exchange level.

Interviewing After Midnight

The Blaise scheduler can only handle a daybatch that delivers cases within the 24-hour period defined by 12 AM (midnight) and 11:55 PM interviewer time. After 11:55 PM interviewer time the daybatch is automatically closed. If crew is scheduled everyday for 24 hours, you can make an appointment for any time within this 24-hour period for the interviewer time zone. However, for every time zone that differs from the interviewer time zone, there is period of time for which you cannot make appointments. For example, using the example in this note, it is impossible to make appointments from 9PM to 11:55 PM PST.

If you are interviewing in EST, but want to operate until 1:30 AM each morning so that you can set PST appointments as late as 10 PM, there are a number of approaches that you can use. Perhaps the simplest approach would be to use a user-defined appointment block, in which you could record appointments later than 8:55 PM for PST cases. (Appointments later than 8:55 PM PST cannot be made using the default appointment block.) Shortly before midnight each interviewing day, you can run a Manipula program that prints out information on all cases with appointments set past 12 midnight EST. Interviewers can then browse up these cases after midnight since cases can be browsed up even if the daybatch is closed.