

Cambium Assessment, Inc.

Item Tracking System

Guide

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Prepared by Cambium Assessment, Inc.



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Introduction to This Guide

This guide describes the features and functionalities of the Item Tracking System (ITS).

For details on how to use IAT, refer to the *IAT Guide*.

Organization of This Guide

The guide consists of the following sections:

- [Overview of ITS](#) provides a brief overview of ITS and the user roles in ITS. It also describes how to access the system and understand the system layout.
- [Managing Items and Stimuli](#) describes how to create and manage items and stimuli in ITS.
- [Reviewing Items and Stimuli](#) describes how to review and approve items and stimuli in ITS.
- [Form and Test Engineering](#) explains how to manage forms, assemble tests, manage scoring specifications, and manage blueprints.
- [Managing Assessment Tools](#) explains how to manage publications.
- [Rating Item Content](#) describes how to assign and rate items in ITS.
- [Generating ITS Reports and Performing Other Actions](#) explains how to generate different types of reports in ITS and perform certain other actions.
- [Managing Content Standard Publications](#) explains how to manage content standards in ITS.
- [Managing Animation Requests](#) explains how to manage animation requests for items and stimuli in ITS.
- [Appendix A. Glossary](#) defines some of the terms used in ITS.
- [Appendix B. Cross-Bank Features](#) explains how to perform tasks across item banks.
- [Appendix C. Item and Stimulus Import Overview](#) provides an overview of how items and stimuli are imported in ITS.
- [Appendix D. Psychometrics Tasks in ITS](#) provides instructions for tasks performed by the Psychometrics (Tech) team.
- [Appendix E. Descriptions of All Platform Review Reports](#) provides a summary of each available ITS report related to Platform Review.
- [User Support](#) provides Help Desk contact information.

Overview of ITS

ITS is a web-based software application that, in conjunction with the Item Authoring Tool (IAT), which can be accessed through ITS, enables you to create items and stimuli for testing purposes. Once the items and stimuli have been created, you can review, approve, and publish these items in ITS so that they can be administered to students through the Test Delivery System (TDS).

ITS serves as an item repository and comprises several databases, referred to as item banks, that contain items specific to a client or project. It is an integrated system that supports all phases of test development. It facilitates direct item entry by item writers, online review and editing by reviewers, automated reporting for clients, and management and production of test forms.

ITS is also capable of importing item content in various formats, including XML and other non-proprietary formats. Once imported, the items can be viewed and managed in the same manner as items created in ITS.

Note that since ITS is highly customizable and is configured differently for each item bank, some of the features and functionalities described in this guide may not apply across all item banks.

This section includes the following:

- [Understanding User Roles and Permissions](#)
- [Accessing ITS](#)
- [Understanding the ITS User Interface](#)

Understanding User Roles and Permissions

Each user in ITS has a role, such as a writer or a reviewer. Each role has an associated list of permissions to access certain features within ITS.

The user roles are configured according to the needs of each item bank. The number of roles, role names, and even the permissions associated with a role may vary from one item bank to another. For example, if a client practices an elaborate review process, the client's item bank may be configured with a larger number of reviewer roles than other banks. The same user role may be referred to as "Preliminary Reviewer" in one bank, but "Initial Reviewer" in a different bank. And again, the same user role may have permissions to access a certain feature in ITS for one bank, but not for another.

Accessing ITS

To access ITS, you need a valid username and password. Your ITS administrator creates your account, and then ITS sends you an activation email. This email contains a link that takes you to the **Reset Your Password** page where you can set up your password for logging in to ITS.

This section describes how to activate your ITS account and log in to ITS.

If you need access to multiple item banks, the ITS Help Desk will need to grant your account access to each of the item banks you need. Refer to [User Support](#).

Activating Your ITS Account

1. Click the link in the activation email. The **Reset Your Password** page appears ([Figure 1](#)).

Figure 1. Reset Your Password Page

⚠ Create a new password following the requirements.

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Reset Your Password

New Password

Re-Enter New Password

Reset Password

New Password Requirements

Your password must be at least twelve characters long and have at least one from each of the following categories:

- An uppercase character (A–Z)
- A lowercase character (a–z)
- A number (0–9)
- A special character (% # !, etc.)

Support

- [Need more help?](#)

2. In the *New Password* and *Re-Enter New Password* fields, enter a new password. The password must be at least twelve characters long and must include at least one uppercase alphabetic character, one lowercase alphabetic character, one number, and one special character (for example, %, #, or !).
3. Click **Reset Password**.

Account activation is complete. You can proceed to ITS.

Logging in to ITS

1. Open your web browser and navigate to ITS (<https://its.cambiumast.com>).
2. In the login page that appears, enter your email address and password.

Figure 2. Login Page

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Secure Login

Email Address

Password

[Reset Password](#)

[Log In](#)

Support

- [Why reset passwords each school year?](#)
- [Didn't receive the reset password email?](#)
- [Link doesn't work?](#)
- [Need an account?](#)
- [Not sure if you're registered?](#)
- [Need more help?](#)

3. Click **Log In**.
 - a. If you have not logged in using this browser before, or if you have cleared your browser cache, the **Enter Code** page appears and an email containing an authentication code is sent to your address.

Figure 3. Enter Code Page

☑ A confirmation code has been sent to your email address. The code will expire in 15 minutes.

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Confirm Account

One-time code received via email

Emailed Code

[Submit](#)

[Resend code](#)
[Cancel](#)

Support

- [Need more help?](#)

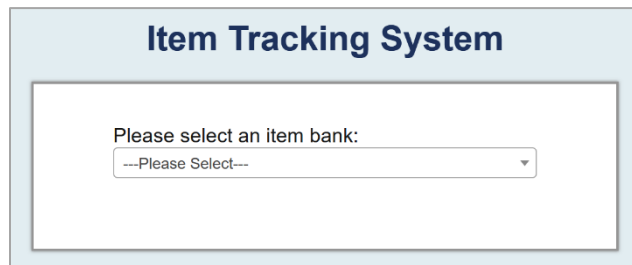
- i. In the *Enter Emailed Code* field, enter the emailed code.

- ii. Click **Submit**.

Note that you must use the authentication code within 15 minutes of the email being sent. If the code has expired, click **Resend code** to request a new code.

4. From the item bank dropdown list ([Figure 4](#)), select the required item bank. This will take you to the landing page for your item bank and role. Alternatively, to use cross-bank features, select **Cross Bank** at the top-right corner and follow the instructions in [Appendix B](#).

Figure 4. Item Bank Selection Page



The screenshot shows a web interface for the Item Tracking System. At the top, there is a blue header with the text "Item Tracking System". Below this header is a white rectangular area containing a form. The form has the text "Please select an item bank:" followed by a dropdown menu. The dropdown menu currently displays "---Please Select---" and has a small downward-pointing arrow on its right side.

About Usernames and Passwords

Your username is the email address associated with your account in ITS. When you are added to ITS, you receive an activation email containing a temporary link to the **Reset Your Password** page. To activate your account, you must set up your password within 15 minutes of the email being sent.

- **If your first temporary link expired:**

In the activation email you received, click the second link provided and proceed to request a new temporary link.

- **If you forgot your password:**

On the login page, click **Reset Password** and then enter your email address in the *Email Address* field. You will receive an email with a new temporary link to reset your password.

- **If you did not receive an email containing a temporary link or authentication code:**

Check your junk mail folder. If you still cannot find the email, contact your ITS administrator to make sure you are listed in ITS.

- **For additional help:**

If you are unable to log in, contact the ITS Help Desk for assistance. Refer to [User Support](#).

Understanding the ITS User Interface

This section describes ITS features and layouts and explains how to perform some common tasks, such as switching between item banks.

About the Home Page

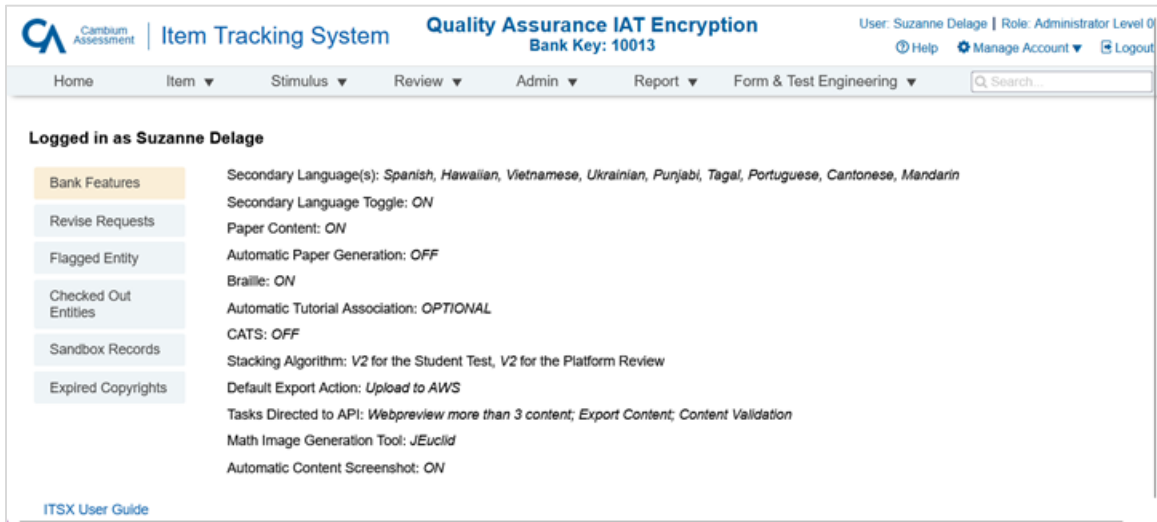
When you log in to ITS, the page that appears depends on your user role. For example, a Workspace user role may take you directly to the **Content Form Workspaces** page. For many user roles, the **Home** page ([Figure 5](#)) appears. The features of the **Home** page vary according to your user role and the bank, and may include the following:

- The **Bank Features** tab summarizes the key characteristics of the bank, such as whether the bank supports a secondary language, whether it supports paper tests, and whether braille is enabled.
- The **Revise Requests** tab allows you to view pending requests, as described in [Viewing Pending Requests](#).
- If the bank includes active items or stimuli that are cloned or shared but have been flagged at source due to existing issues, the **Flagged Entity** tab displays a table of those entities, along with a table displaying a history of items that were flagged but have been resolved or acknowledged. You can use the **Download** buttons to download either table.

For information on managing flagged items and stimuli, refer to [Common Item Alerts](#).

- The **Checked Out Entities** tab lists all entities that are currently checked out. You can filter entities using the *Search* field at the top right. You can download the currently displayed list using the **Download** button.
- In the **Sandbox Records** tab, non-administrator users can view a table of all their open but unsaved entities in the current bank. Administrators can view a table of all users' open but unsaved entities in the current bank. You can filter using the *Search* field at the top right.
- The **Expired Copyrights** tab lists any stimulus copyright sets whose contracts have expired. For more information, refer to [Recording Copyright Information for a Stimulus](#).

Figure 5. Home Page



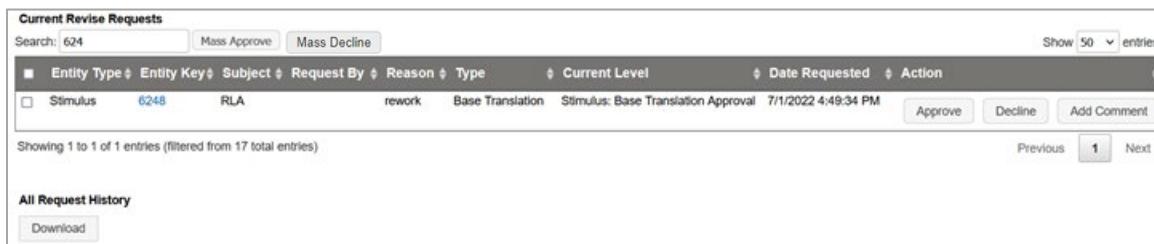
Viewing Pending Requests

If you submit a request to edit an item or stimulus, the request is displayed in the Current Revise Requests table in the **Revise Requests** tab of the **Home** page. If you wish to cancel or revert your revise request, click **Cancel** for that request.

If you are logged in as a Review Administrator and requests for editing items or stimuli that are in locked status have been submitted, a **Requests** button appears in the banner along with an item badge displaying the number of pending requests.

1. Click the **Requests** button. The pending requests are displayed in the Current Revise Requests table, while a complete review history for the pending requests is displayed in the Request History table.
 - If multiple requests are displayed, you can filter the requests by entering keywords in the *Search* text box.

Figure 6. Home Page: Viewing Pending Requests



2. To manage your pending requests, do the following as necessary:

- To approve a revise request and allow edits, click **Approve**. Once you approve, the locked content gets unlocked and becomes editable. Please note that when you unlock content, any child content that had been previously approved and locked is also unlocked and must be reviewed and approved again.
 - You can also mass-approve pending requests by marking the checkboxes next to them and clicking **Mass Approve**.
- To deny the change request, click **Decline**.
 - You can also mass-decline pending requests by marking the checkboxes next to them and clicking **Mass Decline**.
- To add comments (for example, to request additional clarification), click **Add Comment**, then enter your comments.

3. *Optional*: To download your request history in Excel (XLSX) format, click **Download**.

About the Banner

The banner ([Figure 7](#)), which appears at the top of all the pages in ITS, provides information about the item bank to which you are logged in and your current user role, along with some menus and controls.

Figure 7. Banner



Note that the menus in the banner vary depending on your current user role. For example, the *Content Rater* menu displays only when you are logged in with a content rater role. Not all controls are shown in [Figure 7](#).

- **Home**: This button takes you to the landing page for your role. For many roles, this is the *Home* page described in [About the Home Page](#).
- **Item**: This menu displays links for performing item-related tasks, such as creating, viewing, and editing items. For information, refer to [Managing Items and Stimuli](#).
- **Stimulus**: This menu displays links for performing stimulus-related tasks, such as creating, viewing, and editing stimuli. For information, refer to [Managing Items and Stimuli](#).
- **Review**: This menu displays links that enable you to search for and review existing items and stimuli. For information, refer to [Reviewing Items and Stimuli](#).
- **Assessment**: This menu displays links for performing assessment-related tasks, such as managing publications. For information, refer to [Managing Assessment Tools](#).

- **Content Rater:** This menu displays links that enable you to rate item content. For information, refer to [Rating Item Content](#).
- **Form & Test Engineering:** This menu displays links to content form workspaces, the test assembly tool, the scoring specification manager, and the blueprint manager. For information, refer to [Form and Test Engineering](#).
- **Report:** This menu displays links for generating reports. For information on the types of reports you can generate, refer to [Generating ITS Reports and Performing Other Actions](#).
- **Master Admin:** This menu contains a link to the **Manage Content Standards Repository with ITS** page where you can manage content standard publications, as described in [Managing Content Standard Publications](#).
- **Animation:** This menu contains links that enable you to manage animation requests created by item and stimulus writers in ITS, as described in [Managing Animation Requests](#).
- **Quick Search:** This text box at the upper-right corner enables you to search for a specific item, stimulus, form, or test existing in ITS, as explained in [Searching with the Quick Search Tool](#).
- **Help:** This button opens the *ITS Guide*.
- **Manage Account:** This dropdown list allows you to change your user role and the item bank you are logged in to. For information, refer to [Changing User Roles](#) and [Changing Item Banks](#).
- **Logout:** This button logs you out of ITS. For information, refer to [Logging out of ITS](#).

Searching with the Quick Search Tool

The banner ([Figure 7](#)) contains a search field at the upper-right corner ([Figure 8](#)) that enables you to quickly search for an item, stimulus, form, or test. When you enter an ID or key, all exact matches are displayed ([Figure 9](#)). You can click one to view it.

Figure 8. Search Field

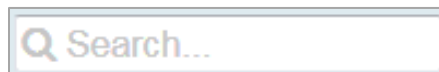


Figure 9. Search Field with Results

20

Item 20
Description: Datafolio Demo - Standard 3
Data Collection 3
Review Level: Locked Operational Pool

Stimulus 20
Description: G3 19-20 Cluster Students
Should Help In Their Town
Review Level: Initial Feedback and
Revision

Test 8381
Publication 8196
Form **20:** FL-ALT-SUM-UD-ELA-DF-4-
SEG3-FA21

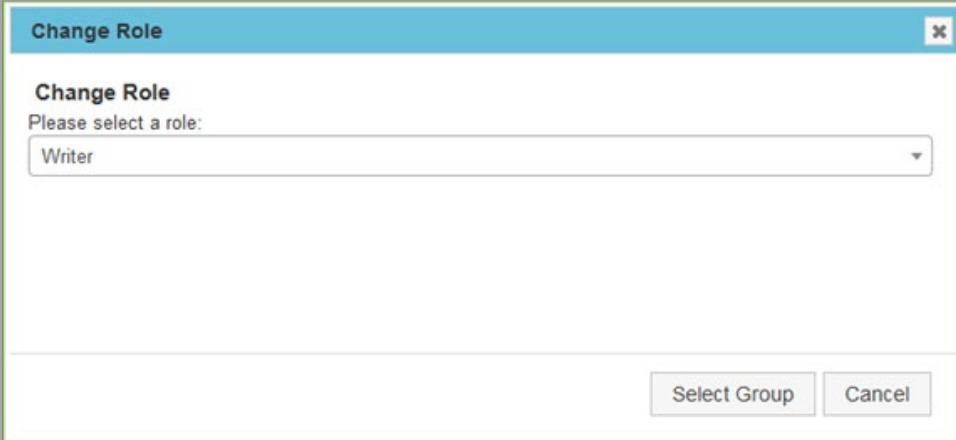
Test 8381
Publication 8196
Form **20:** FL-ALT-SUM-UD-ELA-DF-4-
SEG3-FA21

Changing User Roles

You can have more than one user role for an item bank. While you can only use one role at a time within ITS, you can switch between the roles without having to log out.

1. From the **Manage Account** dropdown list in the banner, click **Change Role**. A **Change Role** window appears ([Figure 10](#)).

Figure 10. Change Role Window



2. Make a selection from the list of the roles available to you.
3. Click **Select Group**. The selected role appears next to your username in the banner and you can perform tasks specific to that role.

Changing Item Banks

You can have access to more than one item bank. Once logged in to ITS, you can switch from one item bank to another without having to log out of ITS.

1. From the **Manage Account** dropdown list in the banner ([Figure 7](#)), click **Change Bank**. The **Item Bank Selection** page appears.
2. From the dropdown list, select an item bank. The landing page for your selected bank and role appears.

Logging out of ITS

For security purposes, it is strongly recommended that you log out of ITS when not using the system. This is to prevent unauthorized personnel from accessing your account and compromising data.

Click **Logout** in the banner. In the confirmation pop-up, click **OK**.

ITS also has automatic logout features. Each session is ended automatically at 4:00 a.m. UTC. When the session is ending in 15 minutes, an alert bar appears at the top of the screen to remind you to save your work and prepare to log out.

Also, if you are inactive for 55 minutes, a message appears, notifying you that you will be logged out after another five minutes.

- If you wish to continue working, click **Stay Logged In**.
- If you wish to log out, click **Log Out Now**.

If you do not specify what you wish to do, you will be automatically logged out after five minutes.

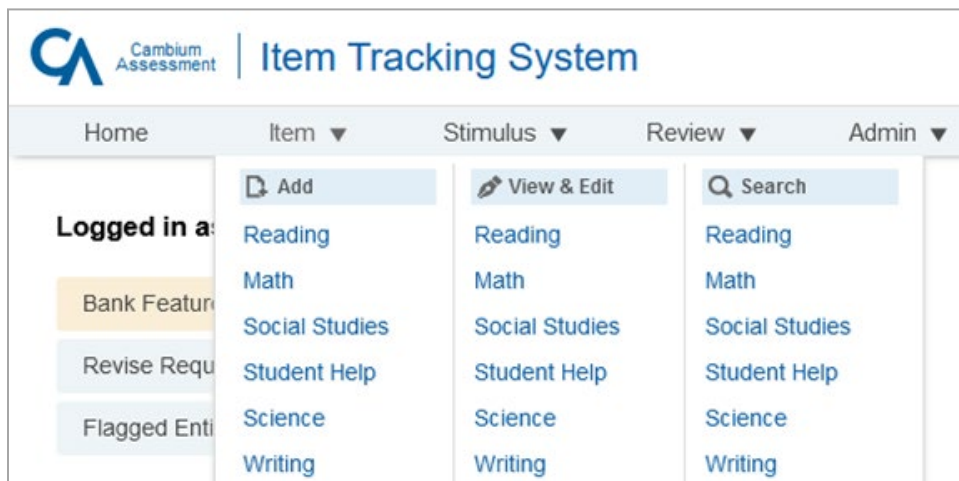
Managing Items and Stimuli

The processes for managing items and stimuli are similar. You can manage items and stimuli for an item bank using the links that appear when you hover over the *Item* and *Stimulus* menus in the banner.

Each of these menus is categorized into different task groups (as in the *Item* menu shown in [Figure 11](#)) that allow you to perform various item- or stimulus-related actions, such as creating, viewing and editing, and searching for them. The task groups available to your role and item bank consist of links for each of the subjects or domains available in that bank. You can perform tasks for a subject or domain by selecting the appropriate link. For example, to search for a Mathematics item, select the **Math** link from the *Search* task category.

The links may include the subject **Student Help**, which allows you to manage student aids; for more information, refer to [Adding Item-Item Associations](#).

Figure 11. Item Menu Expanded to Show Task Groups



Creating an Item or Stimulus

- Creating an item involves multiple steps. You need to specify an item description, set up the item attributes, compose the item's content, associate the item with one or more stimuli if necessary, and finally submit the item for review.

Depending on an item's attributes, an item may have additional content, such as braille files, text-to-speech (TTS) content, sign language content, and other secondary language content. Once an item's English content has been web-approved, you can work on these additional content requirements that are not dependent on each other concurrently. This feature of allowing users to create and review discrete item content in parallel ensures an efficient and quick item creation process.

An item can have different content creation tasks, also known as review lanes or swim lanes, running concurrently. The item template lane represents the topmost level of an

item. You can create each of the child components from the item template lane, although most users do not have the necessary permissions to do so. Once an item's English content is web-approved, the constituent child review lanes open. Each of these review lanes follows its own review process, and once approved and completed, they are merged into the main item content package.

- Creating a stimulus is similar. You need to specify the stimulus description, set up the stimulus attributes, compose the stimulus content, associate the stimulus with an existing item, and finally submit the stimulus for review.

To create an item or stimulus:

1. From the *Add* task group of the *Item* menu (shown in [Figure 11](#)) or *Stimulus* menu, select the subject for which you wish to create an item or stimulus. The **Add Item** or **Add Stimulus** page appears.

The **Item** or **Stimulus** radio button is selected and the subject is displayed in the dropdown list. You may choose different options if necessary.

2. In the *Enter Item Description...* or *Enter Stimulus Description...* field, enter the item or stimulus's name.

Note that entering a description is optional but recommended. If you provide a description, the description is added to the auto-generated item or stimulus ID. You can edit the description later if necessary, as described in [Viewing and Editing an Item or Stimulus](#).

3. Click **Save**. The **View\Edit Item** or **View\Edit Stimulus** page appears, displaying the new item or stimulus along with its ID and description. [Figure 12](#) shows the **View\Edit Item** page.

Figure 12. View\Edit Item Page

I want to View/Edit an

Item Stimulus in subject ELA

Item # 43023 - A Beautiful Day

Actions

- + Item Attributes
- + Content Files
- + Version History
- + Content Review History and Comments
- + Content Attributes
- + Comments
- + IAT Documentation
- + Content Standards
- + Attachment files
- + Associated Forms

4. Provide information for each of the relevant panels. For information on the different panels, refer to [About the Panels on the View/Edit Pages](#).
- When creating an item's content in the **Content Files** panel, you can create and submit content for review for the different review lanes in stages. Once an item's English content has been web-approved, you can create any additional content, such as TTS, braille, or sign language, and submit it for review when completed.
 - If you're creating a stimulus, submit the stimulus's English content for review. Once approved, additional review lanes are displayed per the stimulus attributes. Create content for the additional review lanes and submit when completed.

Note that once you submit item or stimulus content for any of the review lanes, you cannot view, edit, or resubmit the content unless you have access to subsequent levels of review or unless a request to edit the content is submitted by the reviewer. Please verify the content before submitting it.

About the Panels on the View/Edit Pages

The **View/Edit Item** page ([Figure 12](#)) and **View/Edit Stimulus** page have panels that allow you to set up the item or stimulus's attributes, create content, and manage other features and aspects of an item or stimulus. The available panels and the fields within the panels may vary from one item bank to another, and they differ somewhat between items and stimuli. [Table 1](#) describes the panels on these pages.

The page displays the ID and description of the item or stimulus you are viewing. You can edit the description, if necessary, by following the instructions in [Viewing and Editing an Item or Stimulus](#).

Table 1. Panels on the View/Edit Page

Panel Name	Description
Item and Stimulus Attributes	This panel consists of fields specifying the item or stimulus characteristics, such as the grade level for which the item or stimulus is applicable and the layout in which the item should be presented to the student.
Content Files	This panel allows you to create and view an item or stimulus's content, including braille, text-to-speech (TTS), item/stimulus associations, rubrics, and alignments in IAT. It provides information about the current review level of the item or stimulus and enables you to perform platform review.
Version History	This panel displays a history of all the versions created for the item or stimulus.
Content Review History and Comments	Displays the content's revision history along with reviewers' comments.
Platform Review History	Displays a history of the item or stimulus's platform review.

Panel Name	Description
Content Attributes	Displays attributes associated with the content. For item banks that share a centralized database, this panel displays information about whether the item/stimulus has been cloned to or from or shared to or from a different item bank. For more information, refer to Share/Clone to Other Bank . It also displays the last time the item or stimulus was updated in the source item bank, if applicable.
Comments	This panel includes any comments about the item or stimulus.
IAT Documentation	This panel allows you to create and view related documentation, such as graphic, animation, or simulation requests for an item.
Content Standards	This panel, available for items but not stimuli, enables you to view the content standards and SOCKs associated with the item.
Attachment Files	This panel enables you to upload and view attachments, such as PDFs, audio files, or video files. These attachments are for reference only and will not be displayed to a student as part of the item content. For audio or video to be displayed in the item content, you must directly add audio, video, and other applicable files through IAT.
Associated Forms	This panel provides information about the forms on which the item has been included. This is not relevant to creating items.
Common Item and Stimulus Alerts	This panel provides information about any flagged alerts that may exist for the item or stimulus. These alerts are usually generated if the item/stimulus has been cloned or shared from an item/stimulus that has been flagged at source.

Item and Stimulus Attributes

The **Item Attributes** ([Figure 13](#)) and **Stimulus Attributes** panels list the different attribute fields for an item or stimulus. An attribute is a characteristic or feature of an item or stimulus, such as the grade for which an item or stimulus is applicable, whether the item is a field test item or an operational item, whether the content is available in a secondary language, the point value of an item, and whether an item has alternate assessment content (known as AltDoc Content).

Figure 13. View/Edit Item Page: Item Attributes Panel

The screenshot displays the 'Item Attributes' panel for item # 43023 - A Beautiful Day. At the top, there is a dropdown menu for 'I want to View/Edit an' with 'Item' selected and 'Stimulus in subject' set to 'ELA'. Below this is a search bar for the item number and title. The main area is divided into two columns of attribute fields. The left column includes: Grade (dropdown), Subject (dropdown), DOK (dropdown), Stimulus Type (dropdown), Item Writer (text input), Paper Use (dropdown), Reporting Category (dropdown), Markup for FT (text input with a filter prompt), Additional Markup for Operational (text input with a filter prompt), and IAT Answer Key (text input with a filter prompt). The right column includes: 1996 Reporting Category (text input), 1996 SSS Benchmark Code (text input), 2007 Content Focus Code (text input), 2007 Content Focus Description (text input), 2007 Reporting Category Code (text input), and 2007 Reporting Category (text input). A vertical sidebar on the left contains an 'Actions' menu.

The attribute values provide details about the item or stimulus. For certain attributes, such as *Markup for FT* and *Additional Markup for Operational*, validation checks are set in place to ensure that an item cannot progress beyond a certain level and cannot be included in test packages until the item meets the necessary criteria. For example, if an item's attributes indicate that the item requires text-to-speech (TTS) and braille content, ITS ensures that an item cannot progress beyond a predetermined review level until the text-to-speech and braille content has been created and approved. If an item has alternate assessment content turned off, the Item Authoring Tool (IAT) does not allow that content to be created.

While some attributes are standard across all subjects and item banks, others vary based on the subject and item bank. For information about attributes specific to your item bank, please contact your project lead or the ITS Help Desk.

To specify the item or stimulus attributes:

1. From the available attribute fields, select or enter the required values as applicable. Some important things to note about item attributes are:
 - Attribute fields with asterisks are mandatory. The option **None** is not an acceptable value for mandatory attributes.
 - Depending on how an attribute is set up in ITS, you can select multiple values for some attribute fields.

- The values for the *Markup for FT* and *Additional Markup for Operational* fields are automatically populated based on the selected grade and subject. However, you may choose additional or different values if necessary. When selecting values for the *Markup for FT* and *Additional Markup for Operational* fields, ensure that you have selected all additional content requirements, such as Wordlist, TTS, and Paper. ITS's inbuilt validation checks will ensure that the item cannot progress beyond a certain level and cannot be included in test packages until the item meets the necessary criteria. Note that when selecting values for the *Additional Markup for Operational* field, you will only be able to select values that have not already been selected for the *Markup for FT* field.
 - If an attribute field is grayed out or displays "Auto," the value for the field will be automatically provided after the item content is created in IAT.
 - For items that have been imported into ITS from a legacy OpenOffice item bank, there may be legacy read-only attribute fields.
2. Click **Save** at the bottom of the attributes panel to save the specified attributes. A confirmation message appears, notifying you that the item or stimulus has been saved successfully. Click **OK**.

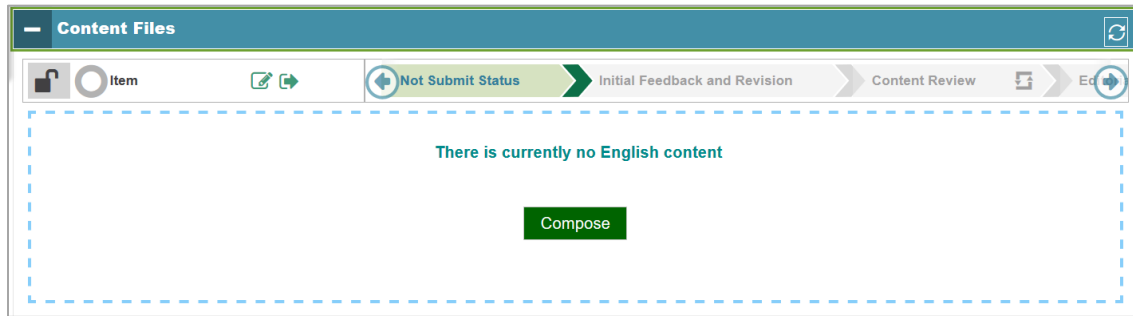
Content Files

You can create all content, including braille, text-to-speech (TTS), sign language, Wordlist, and rubrics, as well as align an item to associated content standards and Some Other Categories of Knowledge (SOCK), from the **Content Files** panel. When you first create an item or stimulus, this panel displays the **Compose** button that enables you to create content online using IAT.

The first step of creating an item's content is to create the item template. Once the item template has been approved, you can view the review lanes for creating additional content. For information on the key features of the **Content Files** panel, refer to [Content Files Panel Features](#).

1. To create an item or stimulus's template, click **Compose** ([Figure 14](#)). IAT opens in a new browser tab or window. Create and save content as described in the *IAT Guide*. After you've saved, the IAT tab or window closes.

Figure 14. View/Edit Item Page: Content Files Panel



The **View/Edit Item** or **View/Edit Stimulus** page updates to display “v1” in the Item or Stimulus lane, plus additional lanes. The active lanes contain buttons allowing you to perform actions such as web-previewing or viewing in IAT. [Table 2](#) describes the different buttons and symbols displayed in the **Content Files** panel.




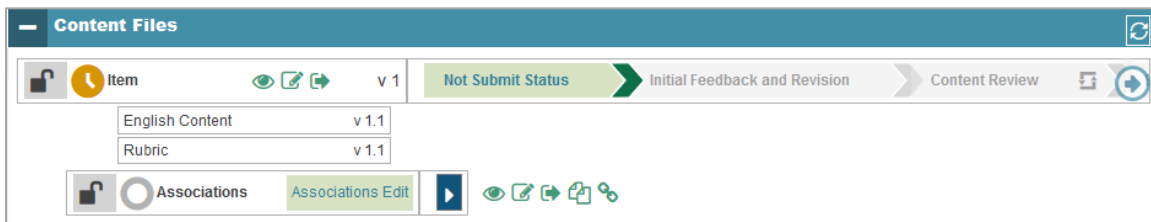
- You can edit the template by selecting the **IAT Editor**  icon. Note that if you need to edit an item or stimulus after it has been approved, you will have to select the **Revise Template**  icon to make any further edits. For more information, refer to [Editing and Revising an Item or Stimulus](#).
- You can revert to an earlier saved version using the revert button . For more information, refer to [Reverting an Item or Stimulus Lane to a Previously Saved Version](#).
- You can add item-stimulus and, on an item, item-item associations using the icons available in the Associations review lane, as described in [Adding Associations](#).

Figure 15. Item Content Files Panel After Item Content is Created




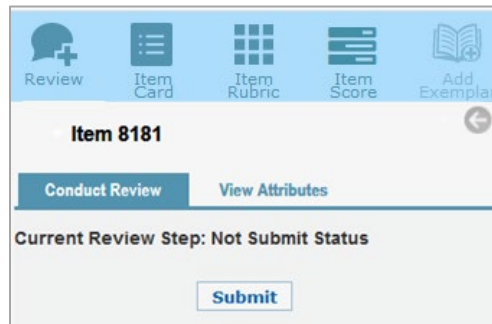
2. Once the template is completed and item-stimulus or item-item associations have been specified as necessary, submit the content for review as follows:
 - a. From the Item or Stimulus review lane, select the **Web Preview**  button. The web preview page for the item or stimulus opens in a new browser tab or window.
 - b. Select the **Review** tab and click the arrow to expand the item or stimulus information.

Figure 16. Web Preview Page: Review Tab with Unexpanded Item ID




- c. Enter a comment.
- d. Click **Submit** to submit the item or stimulus for review. A message appears, indicating whether the content has been successfully submitted.

Figure 17. Web Preview Page: Review Tab Displaying Review Controls



3. Click **OK** to close the message. Close the browser tab or window and return to ITS.

Click the refresh button  on the right side of the **Content Files** panel header to refresh the item or stimulus's status. The item or stimulus now appears at the next review level.

After reviewers review the item or stimulus's content through the different review levels and then web-approve it, additional review lanes or swim lanes are opened.

4. You can now create content as necessary for the available review levels and submit them for review.
5. Once an item reaches the Field Test Pool review level, you can add the item to an item batch from the Platform Review lane to allow reviewers to review the item on different platforms. For more information, refer to [Creating Exemplars for an Item](#).
6. Once the item or stimulus passes through all review levels, it is moved to the Locked Operational Pool and can be included in test packages to be administered to students.








Content Files Panel Features

Some key features of the **Content Files** panel are as follows:

- It displays the review level of an item and of its constituent review lanes.




















Figure 18. View/Edit Item Page: Content Files Panel Containing Item Review Levels



- The various review levels that have been configured for the item bank and that an item must go through before it can be included in any test package are displayed at the top of the panel, while the review levels of each content category, such as associations, braille, and rubrics, are displayed in their own review lanes.
 - Current and past review levels are highlighted in green. Future review levels are in paler gray.
 - You can use  on the right side of the **Content Files** panel header to refresh the page and retrieve the latest statuses.
 - You can use   to scroll through the different review levels.
 - You can use   at the end of a review lane to expand and collapse the review levels.
- The indentations of the review lanes indicate which tasks are dependent on each other. For example, the Braille, TTS, and Sign Language lanes are all dependent on the item's English Content lane. The Spanish Paper lane is dependent on English Paper, which is dependent on Paper Template.
 - The buttons available for each review lane indicate the tasks that can be carried out for that review lane's content. For example, the Item and Stimulus review lanes provide options to web-preview, edit English content in IAT, revert content, check out the item or stimulus, or submit a revision request. The options are displayed based on the status and type of review lane. For example, the **Revise Template**  icon is only displayed in the Item or Stimulus review lane when the template is in locked status. The **Item-Item Association**  icon is only displayed for the Associations review lane for an item.

[Table 2](#) describes the different icons and buttons associated with item and stimulus review lanes.

Table 2. Content File Panel Icons and Buttons

Icon	Description
	Indicates that no content has been created for this review lane.
	Indicates that content has been created for this review lane and is currently in progress.
	Indicates that content creation for this review lane has been completed and the content has been approved.
	Indicates that the item has missing content or that content is being revised and cannot proceed beyond this review level.
	Indicates that the content for this review lane is unlocked and is open for editing.
	Indicates that the content for this review lane is locked and content cannot be edited unless a request to revise the content is submitted and approved.
	Indicates that this step in the review lane includes sub-steps (sub-review levels) that the item needs to progress through. When you click this icon, the sub-review steps are displayed.
 	Displayed next to the Field Test review level to indicate whether the item has undergone platform review. The gray PR symbol means it has not and the green one means it has.
	Opens the content in IAT.
	Opens the Content Reversion window that allows you to revert item content.
	Allows you to submit a request for revising content that has already been approved or restart platform review for the item.
	Opens the web preview window to view the selected content.
	Checks out the content to prevent others from working on it simultaneously.
	Checks in the content to make the content available for others to edit.
	Opens a window in which you can associate the item with an existing stimulus.
	Opens a window in which you can associate the item with other existing items, such as cover page and checklist.
	Opens a window that lets you generate braille files.
	Unlocks an approved exemplar for reapproval or vice versa.

Editing and Revising an Item or Stimulus

If an item or stimulus's content has not yet been submitted for review, you can edit it any time. Once content has been locked, you can edit the content only if a revision request is submitted and approved.



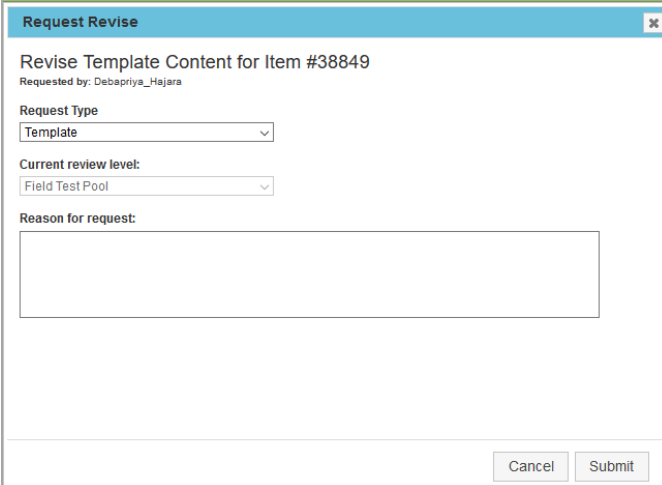

1. From the Item or Stimulus review lane, select **IAT Editor**  to open IAT in a new browser tab or window. Follow the instructions in the *IAT Guide*. After you save, the **View\Edit Item** or the **View\Edit Stimulus** page updates to increment the version number by 1.
2. If the content is locked, then from the Item or Stimulus review lane, select **Revise Template** . A **Request Revise** window appears ([Figure 19](#)), displaying the current status of the item content. Note that you can make requests for multiple items or stimuli simultaneously using the [Mass Revise Request](#) option in the [Action Center](#).

Figure 19. Request Revise Window



3. Enter a reason for requesting the change and click **Submit**. Your comment appears in the **Content Review History and Comments** section. When the item or stimulus is revised per your request, you will receive an automated email.
4. You can edit the content if the request is approved. For information on how to view and approve revise requests, refer to [Viewing Pending Requests](#).

Reverting an Item or Stimulus Lane to a Previously Saved Version

When a review lane is in an editable state, you can revert to any previously saved version using the revert button .

When you revert, the latest item-stimulus associations are always preserved, but all other content within the lane and sub-lanes, including item-item associations, gets reverted. You can edit the item-stimulus associations in the Associations lane as explained in [Adding Item-Stimulus Associations](#).


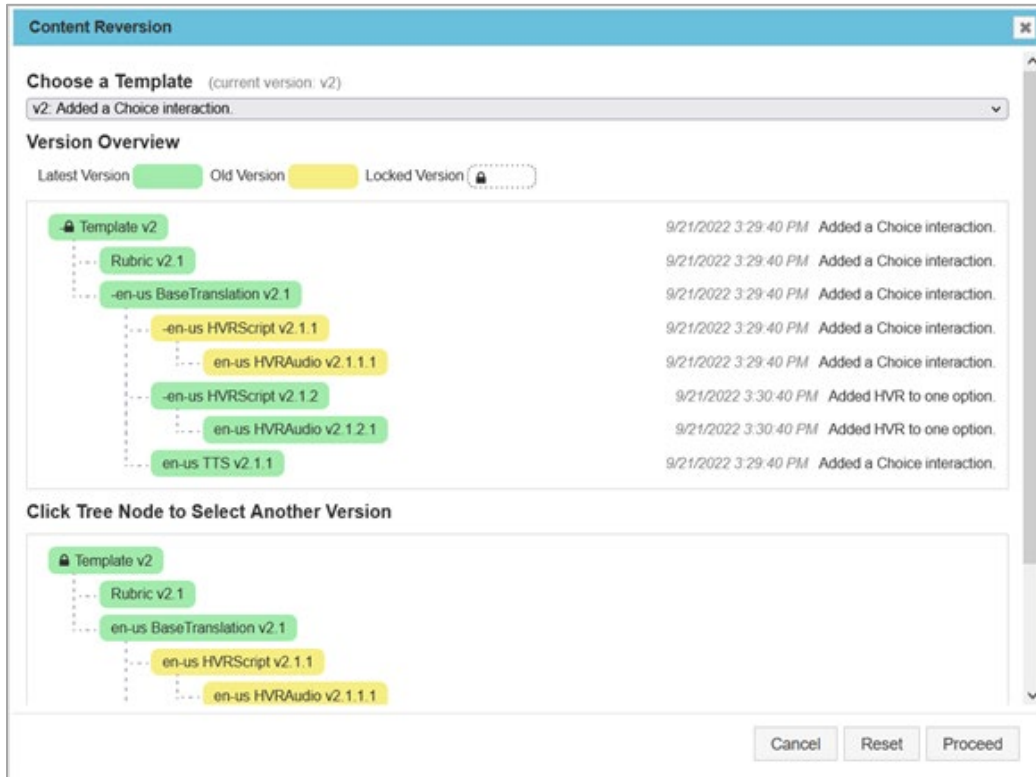
1. In any editable review lane, click the revert button . The **Content Reversion** window appears ([Figure 20](#)).

Figure 20. Content Reversion Window



2. If you're reverting from the item or stimulus template review lane, then select a version from the *Choose a Template* dropdown list. For other lanes, this dropdown is disabled.
3. Review the available versions in the *Version Overview* section, which displays a tree of nodes. You can click the nodes to collapse or expand their child nodes.

Nodes belonging to the latest version are highlighted in green and nodes belonging to older versions in yellow. A lock symbol appears on the left side of a node that is locked, for example, the Template node at the highest level in the hierarchy.

4. In the *Click Tree Node to Select Another Version* section, which displays a tree showing the selected version with the same color coding, click a node to select a different version of that node from a menu. A detailed summary of the proposed reversion appears below the two sections.
5. Review the version numbers, dates, timestamps, and comments or summaries on the selected versions to make sure you've selected the right ones.

To view a long comment or summary in the *Version Overview* section, hover over it.

Figure 21. Detail of Content Reversion Window

Reversion Summary:
 [rollback] en-us HVRScript (v2.1.2 => v2.1.1)
 [rollback] en-us HVRAudio (v2.1.2.1 => v2.1.1.1)

Alternative Save Comment?
 (reversion summary will be used as the save comment, unless an alternative is provided)

Reverted a mistaken edit.
 Reversion Summary:
 [rollback] en-us HVRScript (v2.1.2 => v2.1.1)
 [rollback] en-us HVRAudio (v2.1.2.1 => v2.1.1.1)

6. *Optional:* At the bottom of the window, select the **Alternative Save Comment?** checkbox and enter a comment to include on the revert you're saving. For example, you could write, "Reverted a mistaken edit" and paste in the detailed reversion summary for reference.

Leaving a comment can be useful for tracking and communicating changes. (Note that comments do not appear in the [Comments](#) panel of the item.) If you don't leave a comment, the detailed reversion summary is used.

7. *Optional:* To reset the selections in the *Click Tree Node to Select Another Version* section, click **Reset**.
8. Click **Proceed**. The **Content Reversion** window closes, and a new, reverted version saves. If you wish to revert again, all other versions will still be available.

To view all an item or stimulus's versions, including any reverts, refer to [Version History](#).

Adding Associations

Using the Associations lane, you can associate an item with an existing stimulus or Student Help item (depending on the item type), or you can associate a stimulus with an existing item.

Adding Item-Stimulus Associations


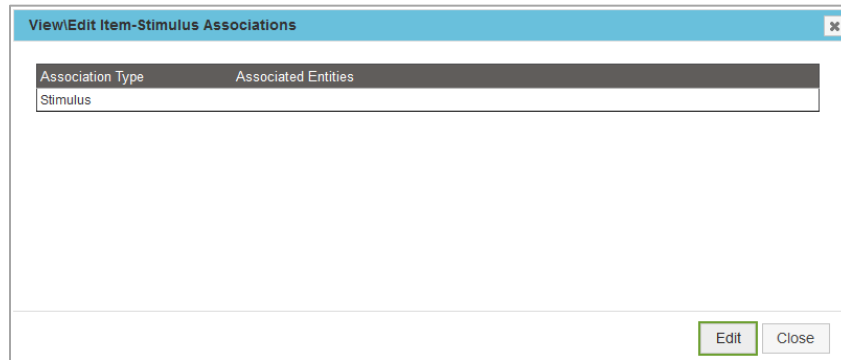
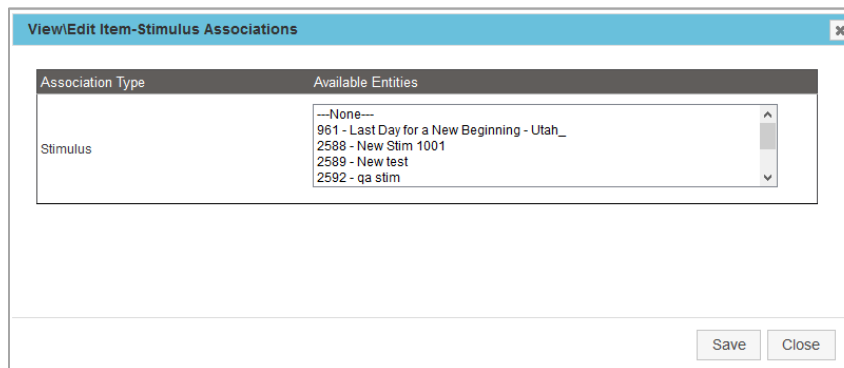
1. From the Associations lane, select . The **View\Edit Item-Stimulus Associations** window appears.

Figure 22. View\Edit Item-Stimulus Associations Window



2. Click **Edit**. The available items or stimuli are listed.

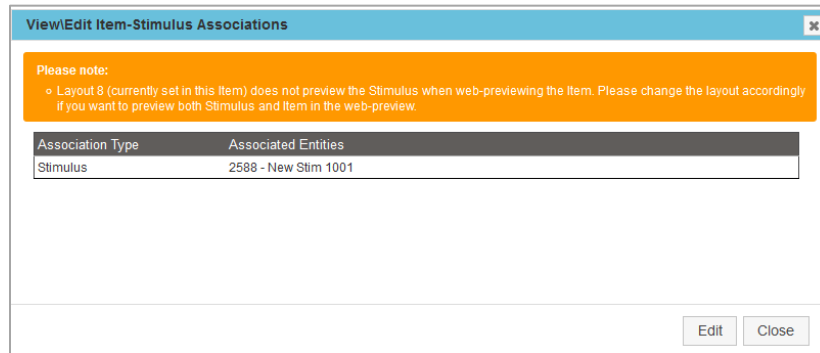
Figure 23. View\Edit Item-Stimulus Associations Window Listing Available Stimuli



3. Select the required item or stimulus and click **Save**. A confirmation message appears, indicating whether they have been associated successfully.
4. Click **OK**. The selected stimulus displays in the **View\Edit Item-Stimulus Associations** window.
5. Click **Close** to return to the **View\Edit Item** or **View\Edit Stimulus** page.

If there is any conflict in web-previewing a stimulus due to the item's layout, an alert displays in the **View\Edit Item-Stimulus Associations** window, as in [Figure 24](#). Close this window and fix the item layout if necessary.

Figure 24. View/Edit Item-Stimulus Associations Window Displaying Alert Message



Adding Item-Item Associations

Items can be associated with other items to assist students in understanding the item. The student aid item types may vary from one item bank to another.

Some student aids are associated with items through IAT. For detailed instructions on how to create or associate student aids in IAT, refer to the *IAT Guide*.

[Table 3](#) discusses the student aids that are created as items in the Student Help subject. If the subject Student Help is not configured for an item bank, these student aids cannot be created in that bank.

Table 3. Student Aids

Name	Description	Procedure
Tutorial	Either a text or an audio or video clip that provides practical information about how to respond to the item.	You can associate a tutorial with items for other subjects using IAT. All tutorials come from a dedicated tutorial bank and are available to other banks based on mappings. Item-level tutorials can be associated with items containing any interaction type(s). Interaction-level tutorials can be associated with interactions of specific types within items.
Checklist	A list of tasks the student can perform and check off before starting a test.	You can associate a checklist with items for other subjects through ITS using the Associations lane.
Cover Page	A cover page contains information necessary to the understanding of an item, but is not part of the item.	You can associate a cover page with a publication, not with an item, in ITS. Refer to Managing Cover Pages for instructions.

To associate an item with a tutorial or checklist:

1. Determine whether the student aid items with which you want to associate the item have been created.

2. If the student aid items have not been created, do the following.
 - To add a tutorial, place a request with your team manager to have one created in the dedicated bank. You can also place a request for edits.
 - To create a checklist, from the *Add* task group of the *Item* menu ([Figure 11](#)), select **Student Help**. Create the item and its content following the procedure described in [Creating an Item or Stimulus](#).

Submit the checklist item for review. Once the checklist item has been reviewed and approved, continue to step [3](#) to associate the checklist with the item for which it was created.


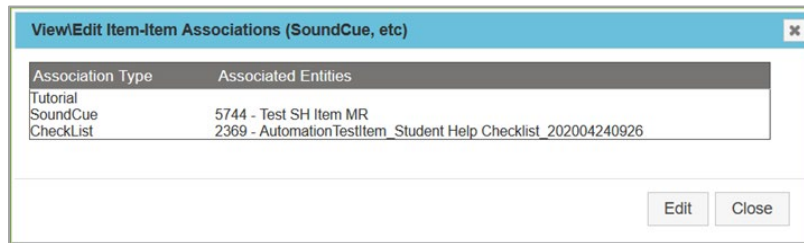
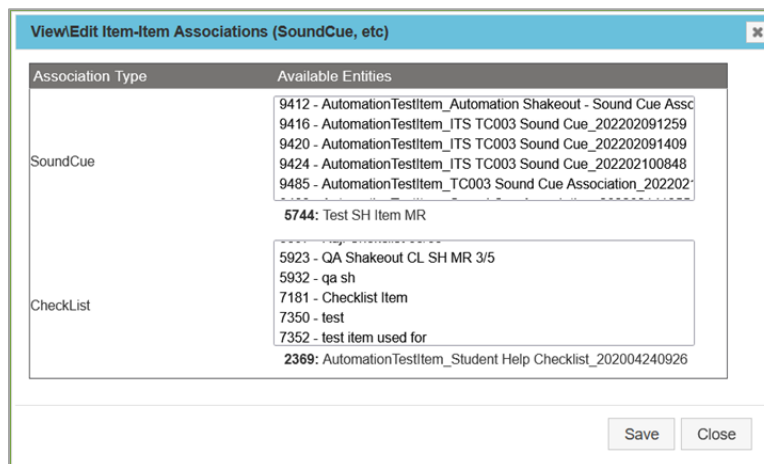
3. Depending on the type of student aid you wish to associate with the item, do one of the following:
 - To associate a checklist with an item:
 - i. From the Associations review lane, select . The **View\Edit Item-Item Associations** window appears ([Figure 25](#)).


Figure 25. View\Edit Item-Item Associations Window



- ii. Click **Edit**. The available items are listed, as in [Figure 26](#).


Figure 26. View\Edit Item-Item Associations Window Listing Available Items



- iii. Select the required items from the available categories and click **Save**. A confirmation message appears, notifying you that the association has been saved.
- iv. Click **OK**. The associated items are listed in the **View\Edit Item-Item Associations** window.
 - To associate a tutorial with an item, select  from the Association review lane. A new browser tab or window opens, displaying the item content in IAT. Follow the instructions in the *IAT Guide*, which are different for tutorials that are specific to an interaction and tutorials that are not. After you've made the association and saved, the selected tutorial is listed in the **View\Edit Item-Item Associations** window.


Creating Item Rubrics

Rubrics are assertions or scoring expressions that are used to machine-score items. You can create rubrics for an item using rubric editors available in IAT.

You can create item rubrics from the Rubric review lane that is displayed after an item's English content has been created. To create item rubrics, use the  button to open IAT in a new browser tab or window. Follow the instructions in the *IAT Guide*.

Creating Human Readable Rubrics (HRR)

Human Readable Rubrics (HRR) are rubrics that are created for hand-scored interactions, or to simply write out a supplementary readable version of the rubric for machine-scored interactions. You can use the HRR editor to enter the criteria used to score an item and to set the maximum score for an item.

You can create HRR for an item from the HRR review lane within the Rubric review lane. Use the  button to open IAT in a new browser tab or window. Follow the instructions in the *IAT Guide*.

Aligning Items to Content Standards and SOCKs

Content standards and SOCKs define the knowledge, concepts, and skills that a student should acquire. Content standards are published by state education departments or other authorized institutions. When creating an item, the item content is aligned to these content standards to measure a student's depth of knowledge.

You can align items to content standards and SOCKs through IAT from the Alignments review lane within the Rubric review lane. Use the  button to open IAT in a new browser tab or window. Follow the instructions in the *IAT Guide*.

Creating Exemplars for an Item

Exemplars are possible student responses to an item, with associated scores that are saved in ITS. Among other things, they help ensure that the item gets scored as expected.

Any user can create exemplars for an item from the item's web preview page. Note that you can only create exemplars after the rubrics and scoring assertions have been created.

To add exemplars:


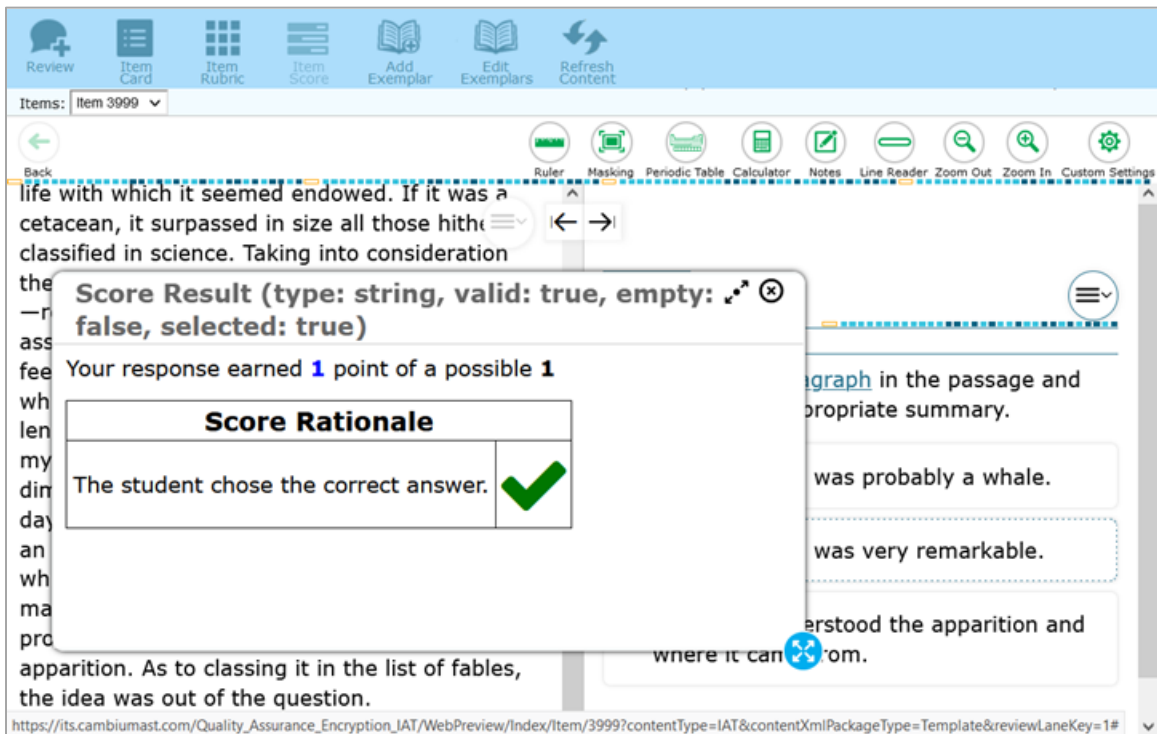
1. Select **Web Preview**  from any of the review lanes. The item opens in a new browser tab or window.
2. Select or enter a response for the item and click **Item Score**. The **Score Result** window appears, as in [Figure 27](#).

Figure 27. Item Web Preview with Score Result Window



3. Once the answer, score, and rationale are ready, click **Add Exemplar**. The **Add a New Exemplar** window appears ([Figure 28](#)).

Figure 28. Web Preview: Add a New Exemplar Window

Add A New Exemplar

Save the current response of the active item as an exemplar:

Item: 5484
Points: 1 out of 1

Name:

Long Description:

Edit View Insert Format Help

← → Paragraph | A1 | A² | A | A | B I U | [Table] | [Link] | [Quote] | [List] | [Indent]

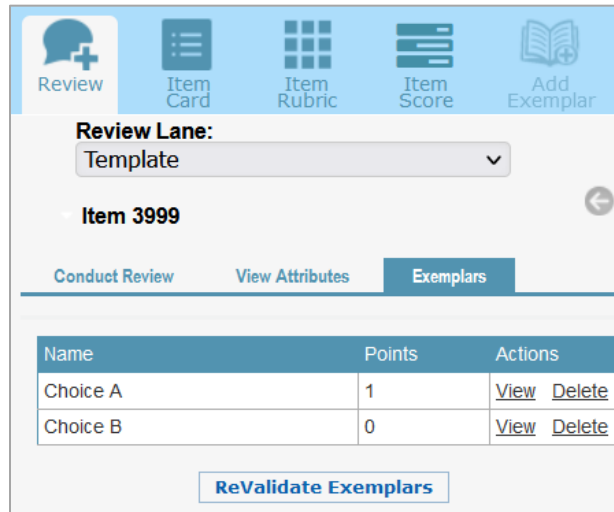
Type or paste your content here!

Use for Response Booklet

Save Cancel

4. Enter the exemplar information:
 - a. Enter a name for the exemplar.
 - b. *Optional:* Enter a description.
 - c. *Optional:* Include the exemplar in the response booklet by selecting **Use for Response Booklet**.
 - d. Click **Save**.
5. Repeat steps [2–4](#) until exemplars have been added for all the score points.
6. Click the **Exemplars** sub-tab ([Figure 29](#)) to view the existing exemplars. If any of the exemplars are invalid, warning icons are displayed next to the exemplar as well as listed in the issues box above the exemplar table.

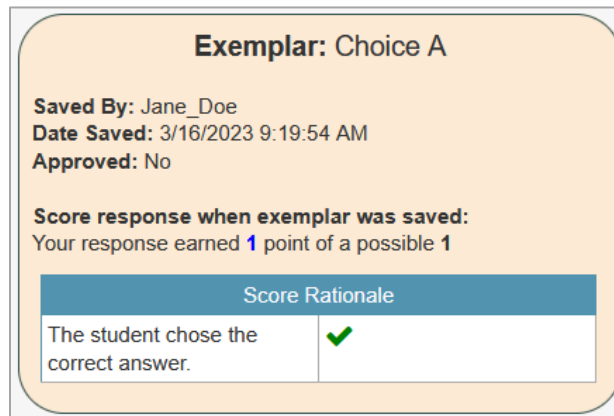
Figure 29. Web Preview: Review Tab: Exemplars Sub-Tab




7. Next, do any of the following:

- To web-preview the exemplar, as in [Figure 30](#), click **View**.

Figure 30. Web Preview: Review Tab: Exemplars Sub-Tab: Sample Exemplar




- To delete an exemplar, click **Delete**. In the confirmation pop-up, click **Yes**. Note that once an item's rubric has been approved, all exemplars existing at the time of the approval are also approved and cannot be deleted. To delete an approved exemplar, from the Rubric review lane, click  to unlock the exemplars. This will however require you to approve the item rubrics once again after exemplars have been deleted.
- To validate exemplars and ensure that they are correct, click **ReValidate Exemplars**. Note that an item's rubrics cannot be approved if the exemplars are not valid.

You can create new exemplars and delete them as necessary after the item rubric has been approved. To lock a new exemplar, you will need to reapprove the item rubrics.

Creating Paper Templates for an Item or Stimulus

Items and stimuli can be created for both online and paper administration. You can mark an item or stimulus as such through IAT. Paper items may be linked to the online/English content, in which case the item content will be identical to the online content. You may also create paper content that is not linked to the online content, in which case you can customize the item content that is displayed for paper.

Paper content in non-English languages can be created using a sub-lane of the Paper Template lane. Use the  button to open IAT in a new browser tab or window. Follow the instructions in the *IAT Guide*.

Recording Copyright Information for a Stimulus

It is always necessary for the Content and Permissions teams to record information on the rights to the material used in a stimulus, even if the material is public domain. The party obtaining the rights is typically the item bank owner, who is typically a CAI client. The information must be recorded and reviewed in the Copyright lane of the **View\Edit Stimulus** page. This record does not affect any copyright notice that may exist in the stimulus content itself.

Each piece of material included in the stimulus requires its own copyright set. You may upload multiple files pertaining to a single copyright set.

The Content team creates the initial copyright sets. Because both the Content and the Permissions teams must work on copyright information, the Content team can skip steps that apply only to the Permissions team and vice versa.


1. In the Copyright lane, click  to open the **View\Edit Copyright** window. The window initially contains a single copyright set. [Figure 31](#) shows the **View\Edit Copyright** window with some more copyright sets created.

Figure 31. View/Edit Copyright Window (Filled Out with Multiple Copyright Sets)

The screenshot shows a web application window titled "View/Edit Copyright". The window is divided into several sections:

- Copyright Set Name:** A text input field containing "Excerpt from 'The Waste Land,' by T. S. Eliot" with a character count of "55 characters remaining".
- Copyright Attributes:**
 - Contract Expiration Date:** A date picker set to "03 / 25 / 2025".
 - Permission Type:** A dropdown menu currently showing "Individual License".
 - Cost of License:** A text input field containing "\$30.00".
 - Source of Text:** A text input field containing "https://www.poetryfoundation.org/poems/47311/the-waste-land" with a character count of "1941 characters remaining".
- Copyright Attachments:**
 - An "Add File" button.
 - A "Remove" button next to a file named "Contract-Waste-Land-Eliot.txt".


On the left side of the window, there is a sidebar with a preview of the copyright set content, including an excerpt from "The Waste Land" and an image of "Nude Descending a Staircase, No. 2, by Marcel Duchamp". There are also buttons for "New Copyright Set" and a "+" icon.

At the bottom right of the window, there are "Save" and "Close" buttons.


2. In the *Copyright Set Name* field, the Content team enters a name for the copyright set. This is often the title of the passage.
3. In the *Contract Expiration Date* field, the Permissions team selects or enters the expiration date of the rights to the material. This field can be left blank if the material is public domain or generated internally. A stimulus cannot be used if a contract on any one of its copyright sets has expired.
4. From the *Permission Type* dropdown list, the Content team selects the type of permission to be obtained for the content; for example, **Copyright Clearance Center (CCC)**.
5. In the *Cost of License* field, the Permissions team enters the amount paid for rights to the material. If left blank, this field will be populated with N/A.
6. In the *Source of Text* field, the Content team explains where the material originated. If left blank, this field will be populated with N/A.
7. In the *Copyright Attachments* section, the Content team uploads the forms needed to request the rights to the material, and the Permissions team later uploads licenses and supporting documentation. These attachments are required for most permission types.

Note that other copyright-related files, such as the source itself and any marked-up PDFs showing edits to the source material, must be uploaded to the **Attachment files** section of the **View/Edit Stimulus** page.

- a. Click **Add File**.

- b. Click **Browse...** and select a file from your computer.
 - c. Repeat as needed and/or click **Remove** to remove uploaded files.
8. *Optional:* To add an additional copyright set, click the **+** button on the left. A new set appears. Follow steps [2–7](#) and repeat as needed. You can view any of the copyright sets by clicking the desired tab on the left.
 9. *Optional:* To remove the currently selected set, click **Remove This Set**.
 10. Click **Save**, then click **OK** in the confirmation pop-up. The information is recorded. You can return and edit it by clicking  again.


An expired contract date triggers an alert on the **View\Edit Stimulus** page. An alert also appears on the **Home** page.

The review process for the Copyright lane involves confirming that the party who is using the material has secured any necessary permissions. Depending on the review level, clicking the  button may open a read-only window.

Version History

This panel displays a history of all the versions created for an item or stimulus. To expand the component versions, click the **+** button. Click **WebPreview** to view the content for each version.

Figure 32. View\Edit Item Page: Version History Panel

Version History						
Package Version History						
Version	Action	Date	Comment	User		
1	Edit Template	10/14/2019 11:52:44 AM	Added MC item and options; Compose New Content	Demo User		WebPreview Template , Rubric , BaseTranslation

Content Review History and Comments

This panel displays a history of updates made to the item or stimulus's content along with comments made by reviewers when reviewing it.

Figure 33. View\Edit Item Page: Content Review History and Comments Panel

Content Review History and Comments						
Show 25 entries					Search: <input type="text"/>	
Review By	Review Lane	Review Level	Outcome	Comments	Date	
Demo_User	Template	Not Submit Status	Create new entity	Open review lane	10/08/2019	
Demo_User	Associations	Associations Edit	Validate from edit page	Open review lane	10/14/2019	

Showing 1 to 2 of 2 entries Previous **1** Next

Platform Review History

This panel displays a history of the item or stimulus's platform review. For more information on platform review, refer to [Performing Platform Review](#).

Figure 34. View/Edit Item Page: Platform Review History Panel

Platform Review History						
Show	25	entries	Search: <input type="text"/>			
Bank Key	Item Key	Review By	Review Level	Outcome	Comments	Date
10013	2838		Ready For Platform Review	Item Added to Batch	Batch 3430: Testbatch9/25	09/25/2020 10:19:26 AM
10013	2838		Ready For Platform Review	Item Added to Batch	Batch 4231: Test Grade 3	09/25/2020 05:58:58 AM
10013	2838		Ready For Platform Review	Item Added to Batch	Batch 4229: Batch_PR_9/24	09/24/2020 03:22:38 PM
10013	2838		Ready For Platform Review	Item Added to Batch	Batch 3386: Batch123_SC_5/15	05/15/2020 02:40:33 PM
10013	2838		Not Ready For Platform Review	WebApprove	Open review lane	05/15/2020 02:14:08 PM
10013	2838		Not Ready For Platform Review	WebApprove	Open review lane	05/15/2020 10:44:36 AM

Showing 1 to 6 of 6 entries Previous **1** Next

Content Attributes

The **Content Attributes** panel displays attributes related to the content. For item banks that share a centralized database, this panel also includes information about whether the item or stimulus has been cloned to or from/shared to or from a different item bank. For more information, refer to [Share/Clone to Other Bank](#).

Figure 35. View/Edit Item Page: Content Attributes Panel

Content Attributes	
Attribute	Attribute Value
Max Score	1
Missing Scorepoints	None
Interactions	Response Identifier: choiceInteraction_1.RESPONSE Type: choiceInteraction Response Type: QTI Scoring Type: QTI Sub Type: multipleChoice Online/Paper: None
Elements	Type: HtmlBlock Sub Type: HTML
Layout	Value:21
Has Paper	No

Comments

This panel allows you to enter and view comments about the item or stimulus.

Figure 36. View/Edit Item Page: Comments Panel

To enter item comments:

1. Enter your comments in the text box.
2. Click **Add**. The comments are displayed together with the username and timestamp in the table above. Multiple comments can be entered.

IAT Documentation

This panel enables you to create generic notes for the item or stimulus; to submit requests for creating graphics, animations, or simulations for the item or stimulus; or, if you are a teacher enrolled in an item writing workshop, to sketch out an outline of an item or cluster. It also enables you to access all these documents.

You can access IAT documentation without editing it using the Action Center, as described in the [View](#) subsection of [Action Center](#). The Action Center allows you to access multiple documents for multiple entities with fewer clicks.

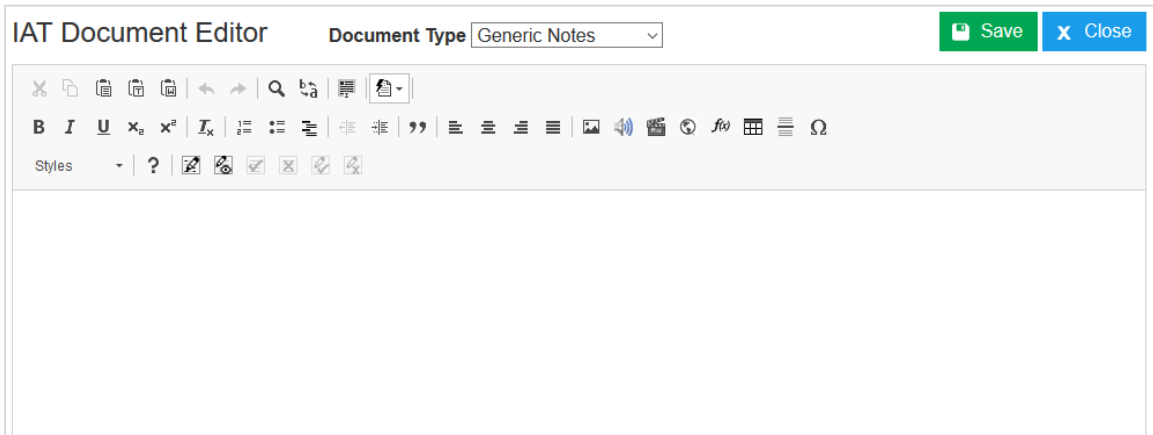
When you submit requests, an email containing the details you provided is automatically sent out to the applicable team. An applicable team member can log in to ITS, create what you requested, and close the request.

Figure 37. IAT Documentation Panel

To create a document or request:

1. In the **IAT Documentation** panel ([Figure 37](#)), click **Create Document**. A new browser tab or window opens, displaying the IAT Document Editor ([Figure 38](#)).

Figure 38. IAT Document Editor: Generic Notes Form



2. From the *Document Type* dropdown list, select the type of document you wish to create. The available options are as follows:
 - **Generic Notes:** This allows you to add generic notes for the item in a CKEditor, as in [Figure 38](#).
 - **Graphic Request:** This allows you to send a request to CAI’s Graphics team. They will create a graphic for the item.
 - **Animation Request:** This allows you to send a request to CAI’s Animation team. They will create an animation for the item.
 - **Simulation Request:** This allows you to send a request to CAI’s Animation team. They will create a simulation for the item.
 - **Item Template:** This allows a teacher to sketch out an outline of an item.
 - **Cluster Template:** This allows a teacher to sketch out an outline of a cluster.

3. Enter information. For help using the CKEditor, consult the *IAT Guide*.
 - If you’re submitting a graphic request, enter your request in the CKEditor.
 - If you’re submitting an animation or simulation request, as in [Figure 39](#), the following options are available, some of them within a CKEditor:
 - *Charge Code:* This mandatory field refers to the project to which the hours spent working on the request will be charged.
 - *Content Lead:* This mandatory field refers to the person responsible for reviewing the files after the request is completed.

- *Animation Title or Simulation Title*: Mandatory fields.
- *Dimensions*: These fields indicate the width and height in pixels or as a percentage (such as 250px or 75%) based on the item or stimulus layout.
- *Storyboard*: This section enables you to upload a storyboard (in PPTX format) detailing the request. Select **Upload**, then follow the **Resource Browser** instructions for inserting media found in the *IAT Guide*.
- *Language* (simulation only): The language(s) of the simulation. You must select at least one.
- *Behavior* (simulation only): The type of simulation.
 - **Interactive**: The simulation itself contains controls. The initial conditions are specified in the simulator input panel. The output panel contains a button that instructs the interactive simulation to send any output to the simulator.
 - **Timeline**: The simulation itself contains no controls. The simulation is started by a button in the simulator input panel. When it completes, it sends its output to the simulator. The timeline type also includes slideshows, in which a series of slides appears depending on the input. Each slide has a specified display time. Once the last slide appears, any output is returned to the simulator.
 - **Static**: The initial conditions are selected in the simulator input panel. The simulation displays a single image based on the inputs.
- *Links to Additional Online Resources*: Links to other similar animations or simulations.
- *Links to Existing Graphics*: Links to any existing graphics related to the request.
- *Inputs and Outputs* (simulation only): The inputs and outputs of the simulation.
- *Short Description*: A short description of the animation or simulation.

Figure 39. IAT Document Editor: Detail of Animation Request Form

IAT Document Editor Document Type: Animation Request Save Close

Charge Code: Content Lead:

Animation Title
provide a descriptive name for this animation

Dimensions
specify width in pixels or use % based on the layout (250px, 75%)
Width: Height:

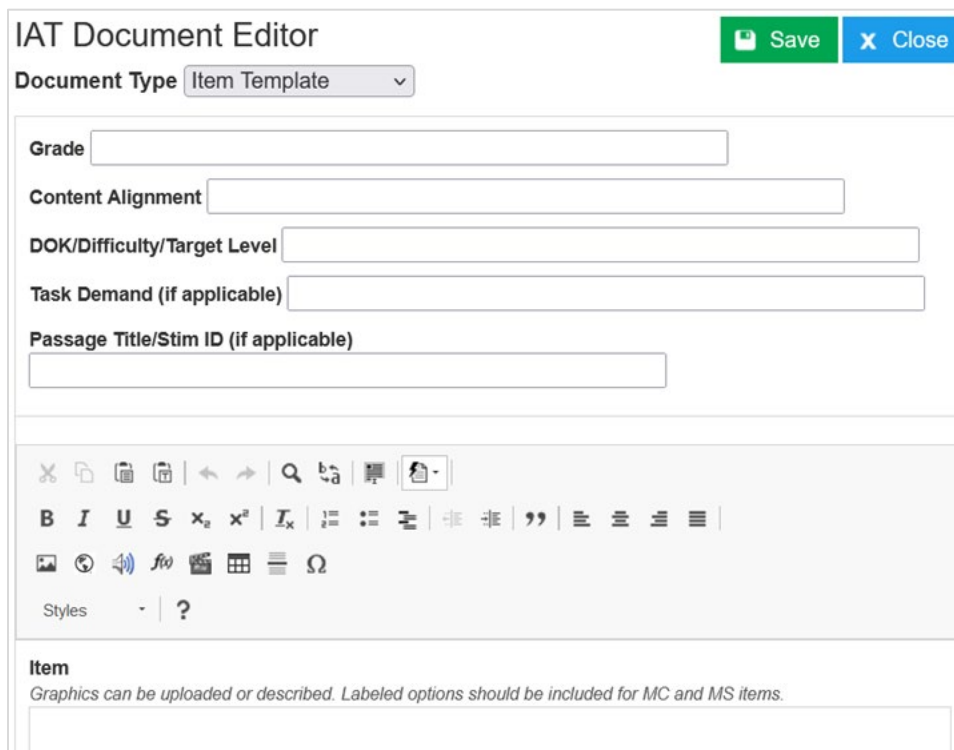
Storyboard
upload powerpoint storyboard document (accepted file types: pptx)

Upload Clear

CKEditor toolbar: Cut, Copy, Paste, Undo, Redo, Find, Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Image, Table, Table of Contents, Styles, Help.

- If you're creating an item template, as in [Figure 40](#), fill out the item information in the following text boxes, some of them within a CKEditor:
 - *Grade*
 - *Content Alignment*
 - *DOK/Difficulty/Target Level*
 - *Task Demand (if applicable)*
 - *Passage Title/Stim ID (if applicable)*
 - *Item*
 - *Scoring Assertion(s)*
 - *Exemplar*
 - *Rationales*
 - *Notes*

Figure 40. IAT Document Editor: Detail of Item Template Form



The screenshot shows the 'IAT Document Editor' window. At the top right, there are 'Save' and 'Close' buttons. Below the title bar, the 'Document Type' is set to 'Item Template'. The form contains several text input fields: 'Grade', 'Content Alignment', 'DOK/Difficulty/Target Level', 'Task Demand (if applicable)', and 'Passage Title/Stim ID (if applicable)'. Below these fields is a CKEditor toolbar with various icons for text formatting and editing. At the bottom of the form, there is an 'Item' section with a text area and a note: 'Graphics can be uploaded or described. Labeled options should be included for MC and MS items.'

- If you're creating a cluster template, as in [Figure 41](#), fill out the cluster information in the following text boxes, some of them within a CKEditor:
 - *Grade*
 - *Performance Expectation*
 - *DOK*
 - *Stimulus*
 - *Task Statement*
 - *Interactions*
 - *Scoring Assertion(s)*
 - *Exemplar*
 - *Notes*

Figure 41. IAT Document Editor: Detail of Cluster Template Form

IAT Document Editor Save Close

Document Type Cluster Template

Grade

Performance Expectation

DOK

Rich text editor toolbar with icons for Bold, Italic, Underline, Strikethrough, Text Color, Background Color, Bulleted List, Numbered List, Indent, Outdent, Link, Unlink, Undo, Redo, and Help.

Stimulus
 Include the information that the student uses to answer the questions. Graphics can be uploaded or described. If necessary, begin with a phenomenon statement.

4. Click **Save**.
5. In the window that appears, provide a name for your document if applicable, enter a comment if desired, and click **Save**. If you edit later, your comment will be replaced.
6. When a confirmation message appears, notifying you that the document or request has been created, click **OK** to return to the **IAT Document Editor** page.
7. Click **Close** to return to the **View\Edit Item** page. The document is listed in the **IAT Documentation** panel and additional action icons are displayed.

Figure 42. View\Edit Item Page: IAT Documentation Panel

IAT Documentation				
Create Document Refresh				
Generic Notes				
Name	Comment	Status	More	
Generic_Note_#1	None	v1 created by Debapriya_Hajara 2/25/2020 6:58:49 AM		
Graphic Request				
Name	Comment	Status	User Action	More
GraphicRequest1	None	v1 created by Debapriya_Hajara 2/25/2020 7:00:31 AM	<input type="button" value="Submit to APG"/>	



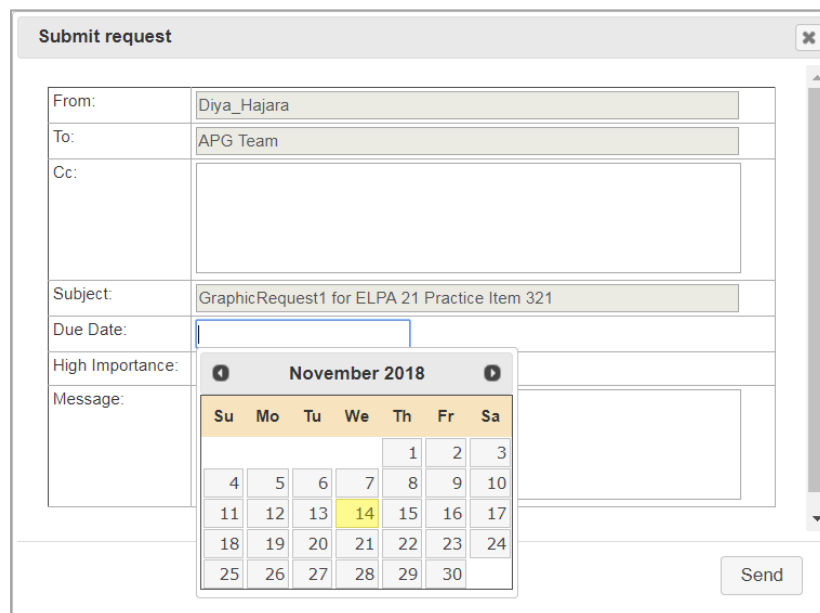
8. Do one of the following:
 - To edit the document or request, click . The IAT Document Editor opens in a new browser tab or window, displaying your document or request. Make updates as necessary and save.
 - To delete the document or request, click . Click **OK** in the confirmation pop-up that appears.
9. If you created a request type of document and you need to submit the request to the appropriate team, click **Submit** on the User Action column for the request. The button name varies depending on the team to which the request is being submitted. A **Submit request** window appears.

Figure 43. Submit Request Window



The screenshot shows a 'Submit request' dialog box with the following fields and values:

- From:** Diya_Hajara
- To:** APG Team
- Cc:** (empty)
- Subject:** GraphicRequest1 for ELPA 21 Practice Item 321
- Due Date:** (calendar open, 14th selected)
- High Importance:** (checkbox)
- Message:** (empty)

A calendar for November 2018 is overlaid on the 'Due Date' field, showing the 14th as the selected date. The calendar grid is as follows:

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	

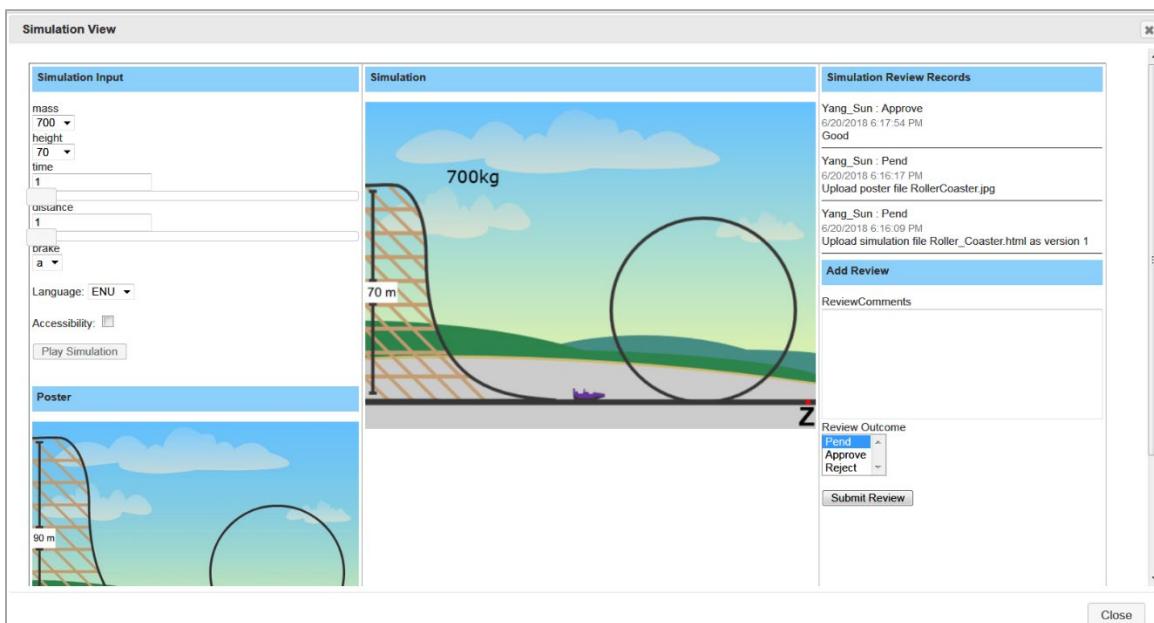
A 'Send' button is located at the bottom right of the dialog box.

10. In the **Submit request** window, do the following:
 - a. *Optional:* Edit the *Cc* field to include anyone who should be copied on the request. Start typing to get a dropdown listing possible recipients.
 - b. In the *Due Date* field, specify the date by which the item is due.
 - c. *Optional:* To prioritize the request, mark the **High Importance** checkbox.
 - d. In the *Message* field, enter a message for the recipient team if desired.
 - e. Click **Send**. An email is sent to the appropriate team and the **Submit request** window closes.

11. Review and mark the request as complete or request additional updates in the following manner:

- For animation or simulation requests:
 - i. Once the request is submitted, the User Action column displays “N/A”. After the animation team uploads the requested file, the **View** and **Mark as Complete** buttons are displayed in the User Action column.
 - ii. To review the request, click **View**. The **Animation View** or **Simulation View** window appears.

Figure 44, Simulation View Window



- iii. View the animation or enter simulation parameters and click **Play Simulation** to play the simulation as applicable.
- iv. To submit a review, do the following:
 - (1) In the *Review Comments* field, enter review comments.
 - (2) Next, from the **Review Outcome** dropdown list, select the desired review outcome.
 - (3) Click **Submit Review**.
 - If you reject the file, the request will again be sent to the relevant team.

- If you approve the file, a notification is sent to the appropriate team. You cannot make any further edits to the request. If edits are required, a new request needs to be submitted.
- v. Once the request is completed and approved, you can add the animation or simulation file to your item and click **Mark as Complete** to mark the request as completed.
- For graphic requests:
 - i. Once the request is submitted, the User Action column displays the **Edits Completed** and **Mark as Closed** buttons ([Figure 45](#)).

Figure 45. Graphic Request Panel Post-Request Submission

Graphic Request				
Name	Comment	Status	User Action	More
GraphicRequest1	None	v1 submitted to APG team by Debapriya_Hajara 2/25/2020 7:04:14 AM	Edits Completed	Mark as Closed


- ii. If you wish to update the original request or if you wish to request changes to the graphic created by the Graphics team:
 - (1) Click  to make edits or enter review comments in the IAT Document Editor.
 - (2) Once you have updated the request, click **Edits Completed** to indicate that all further requests have been entered. The **Complete request** window appears.

Figure 46. Complete Request Window

Complete request ✕

From:


To:

Cc:

Subject:

Message:

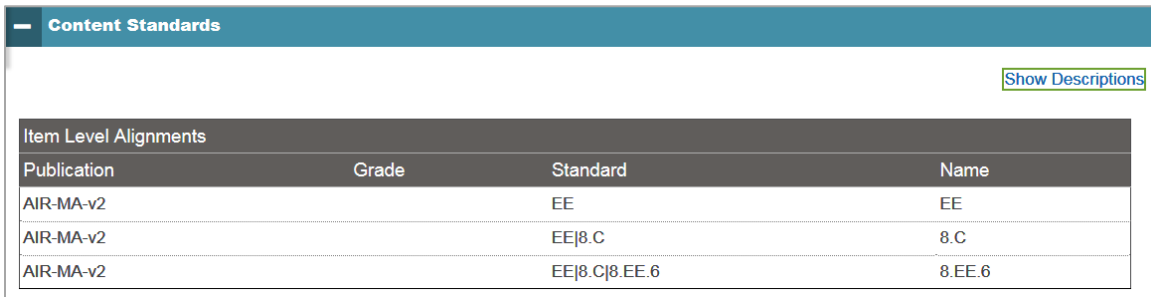
- (3) Enter the necessary information and click **Send**.

- (4) Once you are satisfied with the graphic, click **Mark as Closed** to close the request.
 - (5) In the confirmation pop-up, click **Confirm**.
 - (6) Once the request is closed, the User Action column displays N/A. You can no longer edit the request. You can view the request by clicking .
12. Once the request is marked completed, you can add the graphic, animation, or simulation file to your item.
 13. To create a new request, follow the steps above. The documents and requests are displayed in separate sections in the **IAT Documentation** panel.

Content Standards

On an item, this panel allows you to view the content standards and SOCKs that the item has been aligned to in the **Content Files** panel. For information on how to add content standards, refer to [Aligning Items to Content Standards and SOCKs](#).

Figure 47. Content Standards Panel



Item Level Alignments			
Publication	Grade	Standard	Name
AIR-MA-v2		EE	EE
AIR-MA-v2		EE 8.C	8.C
AIR-MA-v2		EE 8.C 8.EE.6	8.EE.6

By default, the long descriptions of the content standards are not displayed. To view the detailed descriptions, click **Show Descriptions**. You can revert to the short descriptions by clicking **Hide Descriptions**.

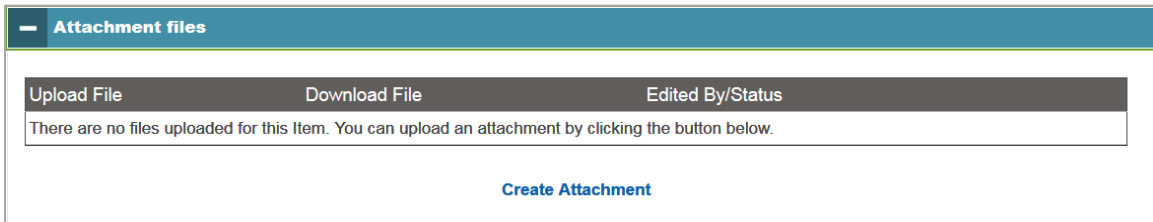
Attachment Files

This panel enables you to view item attachments for legacy items or items that have been converted from OpenOffice and imported into an item bank. Attachments may include audio or video files, slideshows, animation files, PDFs, or HTML files.

You can also use this panel to upload attachments, such as PDFs, for an item. Before you can upload an attachment, you will need to first create a folder in which to store it.

Note that for items created in IAT, you must add the audio, video, and other files that are part of each item directly through IAT, rather than using this panel. For information on how to add attachments to items in IAT, refer to the *IAT Guide*.

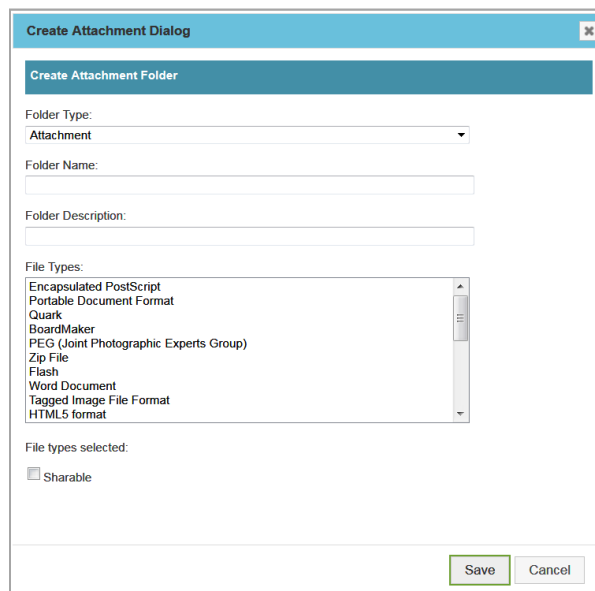
Figure 48. Attachment Files Panel



To create an attachment for an item:

1. In the **Attachment Files** panel, click **Create Attachment**. The **Create Attachment Dialog** window for creating the attachment folder appears ([Figure 49](#)).

Figure 49. Create Attachment Dialog Window



2. From the *Folder Type* dropdown list, select the appropriate folder type. For example, for sound files, select **Ogg Sound**; for American Sign Language videos, select **American Sign Language**.
3. Depending on the type of folder selected, additional fields may be displayed. Enter or select appropriate values for the fields. The different field options are:
 - *File Set/Type*: From the list of available file sets, select the required file set. For example, the available file sets for OGG Sound folder type are Wav and M4A.
 - *Folder Name*: Enter the folder name, which must be unique within ITS. An error message will appear if you try to save a folder with a duplicate name.
 - *Folder Description*: Enter a brief description of the folder.

- *File Types*: From the list of available file types, select the file type of the attachment that will be uploaded to the folder. You can also select multiple file types simultaneously, if applicable.

**Note: About Attachments**

- You can only store one attachment for each file type in a folder. If you try to upload a second attachment of the same file type, the first attachment is overwritten by the second. If you need to create two attachments of the same file type for an item, create a new folder.
 - You can only upload attachments that belong to the file types specified for the folder. For example, if the file types selected for the folder are PDF and PNG, you cannot upload an EPS attachment into the folder.
4. If you wish to share the attachment with other items, mark the *Sharable* checkbox.
 5. Click **Save**. A message appears, notifying you that the folder has been successfully created.
 6. Click **OK**. The folder is displayed in the **Attachment files** section ([Figure 48](#)) in a tabular format consisting of three columns:
 - Upload File: Consists of links that enable you to upload files.
 - Download File: Displays the file extension as a link that you can use to download the file. This column remains blank until you upload the attachments.
 - Edited By/Status: Displays the person who last edited the file, the date the file was last edited, and the current status of the item.
 7. From the Upload File column, click the folder name. A window appears, allowing you to upload your attachment(s).

Figure 50. File Upload Dialog Window

File Upload Dialog

Upload file(s) for Folder PDF #1

Folder Name:
PDF #1

Folder Description:
Item Summary

Sharable:
False

Please click on browse and select PDF file:

No file selected.

Comments:

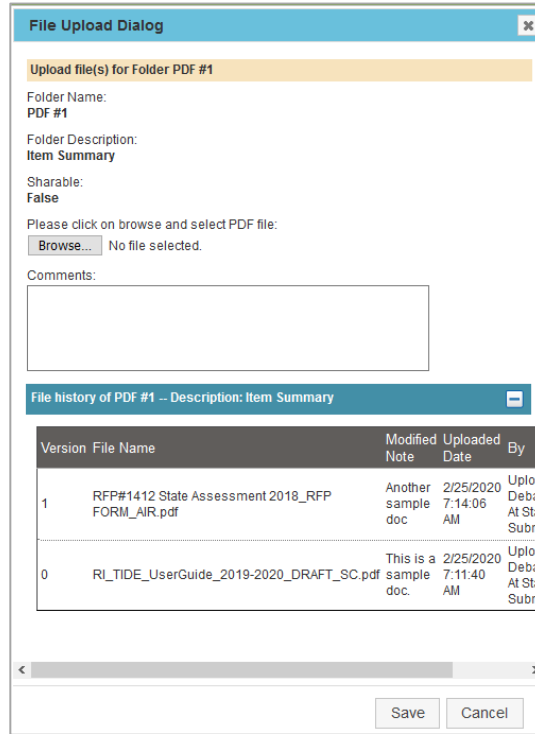
File history of PDF #1 -- Description: Item Summary				
Version	File Name	Modified Note	Uploaded Date	By

8. Click **Browse**. From the window that appears, select the file that you wish to upload from your computer. Ensure that the file extension matches the file type specified for the folder. If you select a file with an incorrect file type, an error message is displayed.
9. Enter comments. Comments are mandatory.
10. Click **Save** to upload the attachment. A message appears, notifying you that the file has been uploaded.
11. Click **OK**. The file extension is displayed in the Download File column.



Note: About Downloading Attachments

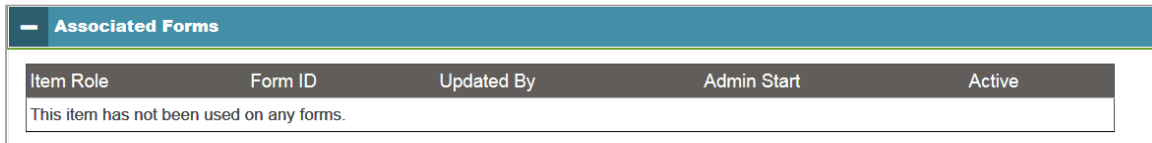
- To download the latest version of an attachment, click the file extension in the Download File column. Your browser allows you to open or save the file.
- To view earlier versions of an attachment, click the folder name in the Upload File column. This opens the **File Upload Dialog** box that displays the existing versions of the file.



Associated Forms

This panel provides information about the forms on which the item has been included. You can add an item to a form using the **Add Item(s) to Form** link under the Forms category on the Action panel.

Figure 51. Associated Forms Panel



However, since an item can only be associated with a form after it has been reviewed and approved, this section is not applicable when creating items.

Common Item and Stimulus Alerts

The **Common Item Alerts** and **Common Stimulus Alerts** panels provide information about the alerts that exist for the item or stimulus. These alerts are generated if the item/stimulus has been cloned or has been shared from a different bank and the source item/stimulus has been flagged as being rejected, released, or having other issues.

In addition to being displayed in the **Common Item Alerts** panel, the alert is also displayed in the Currently Flagged Items table on the **Home** page and an error message is displayed on top of the **View\Edit Item** page for that item. You can also generate a Summary Report to determine if flags exist for the items and stimuli included in the report by selecting the CommonBankAlert attribute when setting up the report. For information on how to generate a Summary Report, refer to [Manage Input Sets](#).

Figure 52. View\Edit Item Page: Common Item Alerts Panel

Common Item Alerts				
Currently Flagged Entities				
Review Level	Common Bank	Common Entity Id	Common Review Level	Comments
Preliminary Review	Ohio Online IAT	33732	Released	<input type="button" value="Comment"/> <input type="button" value="Acknowledge"/>

Flagged Entity History							
Review Level	Common Bank	Common Entity Id	Common Review Level	Reviewer	Reviewer Comment	Date Completed	Comments

To acknowledge that you are aware of the existing issue and remove the flag:

1. Click **Acknowledge**. A pop-up appears.

Figure 53. View\Edit Item Page: Flag Acknowledgment Pop-Up

There is a discrepancy with this entity in other banks regarding rejected, released, or interim status.

- Item Attributes
- Content Files
- Content Attributes
- Version History
- Content Review History and Comments
- Comments
- IAT Documentation
- Content Standards
- Attachment Files
- Associated Forms
- Common Item Alerts

Please enter your comment:

Currently Flagged Entities				
Review Level	Common Bank	Common Entity Id	Common Review Level	Comments
Preliminary Review	Ohio Online IAT	33732	Released	<input type="button" value="Comment"/> <input type="button" value="Acknowledge"/>

Flagged Entity History							
Review Level	Common Bank	Common Entity Id	Common Review Level	Reviewer	Reviewer Comment	Date Completed	Comments

2. Enter a reason or comment pertaining to your acknowledgment and click **OK**.

The pop-up closes. The alert is moved from the Currently Flagged Entities table to the Flagged Entity History table on both the **View\Edit Item** page and the **Flagged Entity** tab of the **Home** page. The error message at the top of the **View\Edit Item** page is also removed.

You can also add a comment for the item by clicking **Comment** in the common alerts panels or from the Currently Flagged Items table on the **Home** page. Adding a comment does not remove the flag.

Viewing and Editing an Item or Stimulus

Depending on your user role, you can view and edit items and stimuli in ITS.

The **Actions** panel available on the **View\Edit Item** or **View\Edit Stimulus** page allows you to perform additional actions.

To view and edit an item or stimulus:

- From the *View & Edit* task group of the *Item* menu ([Figure 11](#)) or *Stimulus* menu, select the subject associated with the item or stimulus that you wish to view. The **View\Edit Item** or **View\Edit Stimulus** page for the selected subject appears.
 - If you are not authorized to edit items or stimuli, the *View & Edit* task group is labeled the *View* task group.

Figure 54: View\Edit Item Page



- From the *Please choose Item* or *Please choose Passage* dropdown list, select the required item or stimulus. You can scroll through or filter the list by typing the ID or description. The selected item or stimulus appears.
- To edit the description, do the following:
 - Click  next to the description. The **Edit Description** window appears.

Figure 55. View\Edit Item Page: Edit Description Window



- b. Enter the new description in the text box and click **Save**. A message appears, indicating that the description has been updated successfully.
 - c. Click **OK** to close the message. The new description is displayed.
4. View or edit other sections as permitted by your user role. For information on the different sections on the **View\Edit Item** page, refer to [About the Panels on the View\Edit Pages](#).

Note that if you are not authorized to edit, you cannot add comments, but you can view data for the other sections.

5. To perform other actions, such as generating item reports or web-previewing the stimulus:
 - a. Click  to expand the floating **Actions** panel on the left side of the page.
 - b. Click an action category, such as **View** or **Content**, to expand the available links. Select the link you want. For detailed instructions on performing these actions, please refer to [Action Center](#).

Cloning an Item or Stimulus Within an Item Bank

You can clone items or stimuli within an item bank in ITS, then modify their attributes or content. This is an efficient way of creating items or stimuli that are similar in nature, especially items that have multiple parts, so you don't have to create them all over again.

You can also share/clone to a different item bank, as described separately in [Share/Clone to Other Bank](#).

To clone an item or stimulus:

1. Retrieve the item or stimulus you want to clone by following the procedure in the section [Viewing and Editing an Item or Stimulus](#).


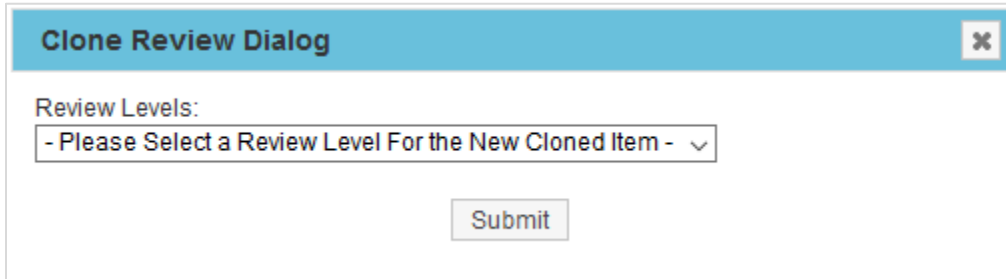
2. On the **View\Edit Item** page ([Figure 12](#)) or **View\Edit Stimulus** page, click  on the left to expand the floating **Actions** panel, then click **Clone**. The **Clone Review Dialog** window appears.

Figure 56. Clone Review Dialog Window



3. From the **Clone Review Dialog** window, select the review level for the cloned item or stimulus and then click **Submit**.
4. A confirmation pop-up appears. Click **OK** to clone the item or **Cancel** to cancel the cloning process.
5. If you clicked **OK** to proceed with cloning, another message appears, notifying you that the item has been successfully cloned and to provide the item ID/key for the cloned item. Click **OK** to close the message.
6. Retrieve the cloned item by item ID using the search field at the upper-right corner (refer to [Searching with the Quick Search Tool](#)) or by following the procedure in the section [Searching for an Item or Stimulus](#). Then edit the item or stimulus as needed.

Searching for an Item or Stimulus

ITS enables you to search for items and stimuli in the item bank and perform different actions on them depending on your user role.

The **Actions** panel available on the search results pages allows you to perform additional actions.

To search for an item or stimulus:

1. From the *Search* task group of the *Item* menu ([Figure 11](#)) or *Stimulus* menu, select the subject associated with the item or stimulus that you are searching for. The **Item Search** ([Figure 57](#)) or **Stimulus Search** page appears.

Figure 57. Detail of Item Search Page

The screenshot shows the 'Item Search' interface. On the left, there is an 'Item Search' sidebar with an 'Actions' panel containing 'Search' and 'Reset' buttons, and a 'Criteria' panel showing 'Subject: ELA'. The main 'Items Search' panel includes several filters: 'Entity Type' (Item), 'Subject' (ELA), 'Review Status*' (checkbox checked), 'Sub-Review Status' (checkbox checked), 'Pending Status' (radio buttons: 'All items in selected status' selected), 'Review Lane' (checkbox checked), 'Lane Status' (checkbox checked), and an 'ID' input field.

2. Enter or select your search criteria. [Table 4](#) describes the different search fields.
 - Some fields, such as *Review Status*, allow you to select all options using the button on the right side. You can clear all by clicking the button again.
 - To remove existing search criteria, click **Reset** in the **Actions** panel.
3. From the **Actions** panel, click **Search**. The **Search Results** page appears, displaying the matching items or stimuli.

Figure 58. Search Results Page

The screenshot shows the 'Search Results' page. On the left, there is an 'Actions' panel with 'Modify Search', 'New Search', and 'Refresh Results' buttons, and a 'Criteria' panel showing 'Subject: ELA', 'Review Levels: Field Test Pool', and 'Pending status: All items in selected status'. The main area displays a table of search results with columns for 'Item ID', 'Description', 'Current Status', 'Grade', 'Interaction', 'Max Score', and 'More Info | Preview | History'. The table shows 15 entries, with a search bar at the top right and a pagination bar at the bottom.

Item ID	Description	Current Status	Grade	Interaction	Max Score	More Info Preview History
14062	test MS5 Item 06/10testingTesting	Field Test Pool	4			[Info] [Preview] [History]
21611	The Foreman	Field Test Pool	10			[Info] [Preview] [History]
23277	Should the Penny Be Retired? - Common_Core	Field Test Pool	5			[Info] [Preview] [History]
23292	Mangrove Conservation and Restoration - Common_Core	Field Test Pool	10			[Info] [Preview] [History]
23323	Natural Ability or Hard Work? - Common_Core	Field Test Pool	10			[Info] [Preview] [History]
23413	Physical and Personal Space - Common_Core	Field Test Pool	10			[Info] [Preview] [History]
24716	Precipitation, Terrain, and Winds - Common_Core	Field Test Pool	8			[Info] [Preview] [History]
24716	Precipitation, Terrain, and Winds - Common_Core	Field Test Pool	8			[Info] [Preview] [History]
24717	Precipitation, Terrain, and Winds - Common_Core	Field Test Pool	8			[Info] [Preview] [History]
24718	Precipitation, Terrain, and Winds - Common_Core	Field Test Pool	8			[Info] [Preview] [History]
24871	Ursa Major - Common_Core	Field Test Pool	9			[Info] [Preview] [History]
24872	Ursa Major - Common_Core	Field Test Pool	9			[Info] [Preview] [History]
24873	Ursa Major - Common_Core	Field Test Pool	9			[Info] [Preview] [History]
24974	To Tackle an Invasive Weed, Bringing in the Hooved Pros - Common_Core	Field Test Pool	10			[Info] [Preview] [History]
25227	Sneeze - Common_Core	Field Test Pool	9			[Info] [Preview] [History]

Showing 1 to 15 of 774 entries

4. To work on the retrieved items or stimuli, do one of the following:
 - To view information about an item or stimulus, use one of the available buttons/links next to it. [Table 5](#) describes the buttons/links.

- To perform actions on one or more items or stimuli, mark the checkboxes beside them and, from the **Actions** panel, select the appropriate link. For detailed instructions on performing these actions, please refer to [Action Center](#).
 - To sort the items or stimuli, select a column header. By default, they are sorted by ID.
5. To perform another search, do one of the following:
- To modify your search criteria, click **Modify Search**. The search page reappears, displaying the previously entered search criteria. You can modify the necessary search criteria and perform a different search.
 - To enter new search criteria, click **New Search**. The search page reappears. Enter or select search criteria to perform a new search.
 - To refresh the search in order to retrieve any new matching items, click **Refresh Results**.

[Table 4](#) describes the search fields on the *Item Search* and *Stimulus Search* pages.

Table 4: Item and Stimulus Search Criteria




Panel	Field	Description
Item Search	<i>Entity Type</i>	Indicates the entity type you are searching for. You can choose to search for Item or Stimulus from the dropdown list.
	<i>Subject</i>	Indicates the subject whose entities you are searching for. You can select a different subject if required from the dropdown list.
	<i>Review Status</i>	Indicates the review status of the entities you are searching for. You can either enter or select one or more review statuses from the dropdown list. The review statuses that are available for selection are based on your user role.
	<i>Sub-Review Status</i>	Indicates the sub-review status of the entities you are searching for. Similar to <i>Review Status</i> , you can select or enter multiple sub-review statuses simultaneously.

Panel	Field	Description
	<i>Pending Status</i>	<p>These radio buttons enable you to specify the type of entities you wish to view. You can only select one radio button at a time. The available radio buttons are as follows:</p> <ul style="list-style-type: none"> • All items in selected status: Displays all the entities that belong to the selected review statuses. • Only pending items in selected status: Displays only entities that are marked as pending for the selected review statuses. • Without pending items in selected status: Displays all entities that belong to the selected review statuses excluding those marked as pending.
	<i>Review Lane</i>	Refers to the review lanes (swim lanes) that an item or stimulus goes through during its lifecycle before it gets to the operational pool and is ready to be included on test forms. This field is used in conjunction with the <i>Lane Status</i> field below.
	<i>Lane Status</i>	Indicates the entity's review level or levels within the lane or lanes specified in the <i>Review Lane</i> field above.
	<i>ID</i>	Indicates the item or stimulus ID. You can only enter one ID at a time.
	<i>Description</i>	Searches the description of the entity. You can only enter one description or partial description at a time.
IAT Content	IAT-specific attributes	Refers to the item or stimulus attributes that are automatically generated from the content created in IAT, such as interaction type and scoring type. Select the required values from the different attribute fields.
Share/Clone Info	<i>Shared From</i>	Enables you to search for entities that have been shared from another item bank. You can select one item bank at a time. For more information, refer to Share/Clone to Other Bank .
	<i>Shared To</i>	Enables you to search for entities that have been shared with another item bank. You can select one item bank at a time. For more information, refer to Share/Clone to Other Bank .
	<i>Cloned From</i>	Enables you to search for entities that have been cloned from another item bank. You can select one item bank at a time. For more information, refer to Share/Clone to Other Bank .
	<i>Cloned To</i>	Enables you to search for entities that have been cloned to another item bank. You can select one item bank at a time. For more information, refer to Share/Clone to Other Bank .

Panel	Field	Description
Item Attributes	Subject-specific attributes	Refers to the different attributes of an item (such as grade, standard, topic, and benchmark) or stimulus (such as grade, word count, length, and author) that are set up in ITS. Select the required values from the different attribute fields. You may select multiple values simultaneously for some of the attribute fields. For example, you may select the values 3 , 4 , and 5 simultaneously for the grade attribute.
Content Standards / Socks	Subject-specific content standards and SOCKs	This section only appears in item search, not stimulus search. Refers to the different content standards and SOCKs specified for the attributes. You can select the required contents from the respective content standard and SOCKs categories.

[Table 5](#) describes the buttons/links for viewing item or stimulus information on the **Search Results** page.

Table 5. Buttons/Links on the Search Results Page

Link Name	Description
ID	The ID link opens the View/Edit Item page (Figure 12) or View/Edit Stimulus page in a new browser tab or window.
	This button opens a new browser tab or window with a summary of the entity's attributes, content standards, and item/stimulus associations.
	This button opens a new browser tab or window that shows how the entity is displayed to the student in the TDS. You can use the buttons and action items available on the web preview page to review or approve content. You can web-preview multiple entities simultaneously using the links in the Actions panel (as described in Action Center).
	This link opens a new browser tab or window that displays a history of the edits made to an entity's attributes.

For detailed instructions on performing actions in the **Actions** panel, please refer to [Action Center](#).

Performing Platform Review

Once an item or stimulus is web-approved, users can perform platform review to ensure that it works as expected on all supported platforms.

The platform review process consists of the following phases:

1. **Batching:** A Platform Review Administrator submits the item or stimulus for review as part of a batch. A batch is a set of items/stimuli, typically ones that are similar to each other; for example, they may all be intended for the same subject and grade. The admin sets the platforms and accommodations that need to be tested. Then they can either assign the batch to particular Platform Review - Temp Users, or make it available to all users with that role.
2. **Testing:** Platform Review - Temp Users test the item or stimulus on the required platforms with the required accommodations. Different Temp Users may have access to different platforms.
 - When Temp Users determine that an item or stimulus works correctly across all required accommodations and platforms, the entity passes platform review, ending the process.
 - However, if any Temp User determines that an item or stimulus has failed in some regard, it is not moved to a new status, and the batch is not completed.
3. **Further Review:** If an item or stimulus has failed Temp User review in some regard, it requires further review by a Platform Review - PR Reviewer (or by a Platform Review Administrator or another high-level administrator). This user can view the item or stimulus's whole review history and choose a resolution. The item or stimulus may be approved, thus passing platform review, or may be moved into the Platform Review Failed-Triage status.

Understanding the Platform Review Page

To view the **Platform Review** page, set your role to one that has access. For help, refer to [Changing User Roles](#).

Depending on your role, either the **Platform Review** page appears, or you can navigate to it by opening the *Admin* menu and selecting **Platform Review Administrator**.

- The *Create a batch* section ([Figure 59](#)) displays a table of items and stimuli. The columns to the right of the item/stimulus name column represent review lanes, and a green check mark ✓ indicates that a lane is approved for the item or stimulus. You can open the **View\Edit** page for an entity by clicking its name.

Figure 59. Platform Review Page: Create a Batch Section

Name	Subject	Grade	Passage	Share	Source Bank	Source ID	Source Review Level (Template)	English	HVRScript	SignLanguage	TTS	Wordlist	SpanishTranslation	SpanishTTS	HVRRecording	ComprehensionMeasurement	SpanishComprehensionMeasurement
Item 20	Math			No				✓			✓						
Item 50	Science		5	No				✓			✓						
Item 51	Science			No				✓			✓						
Item 71	Reading	11	8	No				✓			✓						
Item 459	Science	8	112	No				✓			✓	✓		✓			
Item 463	Science	8	113	No				✓			✓	✓		✓			
Item 527	Science	8	124	No				✓			✓						
Item 727	Science	3	162	No				✓			✓	✓		✓			
Item 730	Science		163	No				✓			✓						
Item 731	Science		163	No				✓			✓						
Item 732	Science		163	No				✓			✓						
Item 829	Science		176	No				✓			✓						
Item 830	Science		176	No				✓			✓						
Item 847	Science		176	No				✓			✓						
Item 900	Science	8	186	No				✓			✓						

You can click **Rescan Bank** to completely refresh items and stimuli in the *Create a batch* section with the correct information. This is helpful when an item or stimulus is actually in the Ready for Platform Review level but still appears to be in a Not Ready level.

- Depending on your role, the *Entities Failed Platform Review* section (Figure 60) may appear, displaying a table of any items and/or stimuli that have failed platform review. Click the name or ID of any entity or batch to view it.

Figure 60. Platform Review Page: Entities Failed Platform Review Section

Batch	Batch Name	Entity	Subject	Grade	Status	Failed Content	Comments	Reviewed By	Actions
3436	test	Item 4395	ELA	5	Platform Review Failed-Triage		QA TEST		Review
3512	Raji batch 04/30	Item 6638	ELA	3	Platform Review Failed-Triage		need resolution, Pend, test		Review
4252	0Batch	Stimulus 837	ELA	3	Platform Review Failed-Triage				Review
4312	QA Ni 1/31_PR9	Item 12534	ELA	3	Platform Review Resolution				Review
12753	stimulusonlybatch3/22	Stimulus 1713	ELA	3	Platform Review Failed-Triage		C		Review



- The *Review Batches* section (Figure 61) displays a table of batches to be reviewed. A green check mark icon ✓ appears in the Ready column to indicate that a batch has passed platform review, and a yellow alert icon ⚠ appears to indicate that a reviewer has found issues.

Figure 61. Platform Review Page: Review Batches Section

#	Batch	Total Items	ChromeOS	iPadOS	Linux	macOS	Windows 8	Windows 10	Windows Take A Test	Ready	Progress	Review
4140	Big batch	33	2	0	--	--	--	0	0		Abandoned	View
3763	r	10	0	0	0	0	0	0	0		Complete	View
4214	QABatch	10	--	--	--	--	--	--	--	✓	Abandoned	View
4227	Test Batch 10	10	--	--	--	--	--	--	--	✓	Abandoned	View
3425	Batch 10	10	0	0	0	0	0	0	0		2 of 9 Items 1 of 1 Passages	View
4219	Test Batch 10	10	--	--	--	--	--	--	--	✓	Abandoned	View
4230	Test batch 10	10	--	--	--	--	--	--	--	✓	Abandoned	View
3495	QAtestPR	9	0	0	0	0	0	0	0		5 of 8 Items 1 of 1 Passages	View
4270	WZ Batch E 1202	9	0	0	0	0	0	0	0		Abandoned	View
4228	Batch 10	9	--	--	--	--	--	--	--	✓	Abandoned	View
3457	Raji 11/19	9	7	6	5	4	4	6	4		6 of 7 Items 2 of 2 Passages	View
4217	Raji Batch	9	--	--	--	--	--	--	--	✓	Abandoned	View
4218	Raji Batch	9	--	--	--	--	--	--	--	✓	Abandoned	View
4238	Wei Batch 1	8	--	--	--	--	--	--	--	✓	Abandoned	View
3580	wz batch 4/28	8	0	0	0	0	--	0	--		2 of 7 Items 0 of 1 Passages	View

In addition to submitting and reviewing batches, some users can use the **Platform Review** page for the following tasks:

- You can use the **Filter** button at the upper-right corner of any table to filter lists of batches or entities. More detailed instructions on filtering can be found later in this section.
- You can export any table to an Excel (XLSX) file by clicking the **Export** button in the upper-right corner. Any filters applied to the table are also applied to the export.
- For analysis purposes, some users can export an Excel (XLSX) report on all the items and/or stimuli that either have the Completed status or have had their platforms reviewed. Click **Download Details Report**. A pop-up appears. Optionally, click **Upload** and upload a file containing a subset of item/stimulus IDs to include. Click **Download** to download the report.
- Some users can view a snapshot of review progress. Administrators may find this useful when dividing up review work. Click **Progress Snapshot Dashboard** to open a window displaying the number of items or stimuli in each level of platform review.

When you mark the checkboxes, the counts are divided up into columns based on different attributes. You can change the order in which the columns are nested using the up and down arrow buttons   to the right of each option.

- As a Platform Review - PR Reviewer (or an administrator with platform review permissions), you can view a graph charting the number of items/stimuli each Platform Review - Temp User has reviewed. Click **User Review Throughput**. The window that appears allows you to select users with the Temp User role in this bank and, optionally, the time range in which the work was completed. You may find this useful for coordinating Temp User work. You can also export using the following two buttons:
 - **Export**: Downloads an Excel (XLSX) file listing the information currently displayed in the graph.
 - **Export All Users All Banks**: The same as **Export**, except it draws from all banks.

Submitting Items and/or Stimuli for Platform Review

To be submitted, an item or stimulus must have the status Ready for Platform Review. You can verify its status in the Platform Review swim lane of the **Content Files** panel on the **View\Edit** page. If it has the status Not Ready for Platform Review, that means the required Markup for FT (for example, Text-to-Speech (TTS)) has not been approved.

To begin, set your role to Platform Review Administrator (or another high-level administrator role). For help, refer to [Changing User Roles](#).

Depending on your role, either the **Platform Review** page appears, or you can navigate to it by opening the *Admin* menu and selecting **Platform Review Administrator**.

Upload Batches

As an alternative to creating a batch manually, you can upload sets of items or stimuli to include in batches. This is useful when you want to create multiple batches at once.

1. Click **Upload Excel** at the top-right corner of the *Create a batch* table. The **Upload Excel** window appears.
2. Select the client name from the first dropdown list.
3. From the dropdown lists below, select the test families that the batch will be associated with.
4. Select the platforms that the batch items and/or stimuli must be tested and approved for.
5. Select the accommodations that must be available to the batch items and/or stimuli.
6. Click **Download** to download an Excel (XLSX) template.
7. Fill out the template, save it to your computer, and use the **Browse...** button to select it.

8. Click **Create**. A pop-up appears, listing any errors that arose during batch creation. ITS sends a report on the same errors to your email address. Click **Close**. ITS generates a new publication and config file of the content. The config file in the Assessment Publications module is labeled “Platform Review” to help distinguish it from other configuration files.

The batch appears in the *Review Batches* section ([Figure 61](#)). The configuration is pushed to the TDS team.

9. *Optional*: Click **View** in the *Review Batches* table to open the **Platform Review Batch** window, then do either of the following:
 - To edit the settings for a batch, click **View** in the *Review Batches* table to open a pop-up, then click **Batch Settings**. A settings page opens in the **Platform Review Batch** window, displaying the same settings that were available in the **Create Batch** window. Edit as necessary. Click **Save Settings** or **Cancel**, as desired, to return to the main page of the **Platform Review Batch** window.
 - When a batch is not yet approved, abandon all items and stimuli that have not completed platform review by clicking **Abandon Batch**, then clicking **OK** in the confirmation pop-up. When you’ve done this, the batch is dissolved, and the items and stimuli become available to be added to a different batch.

Create a Batch Manually

1. In the *Create a batch* section, select the items or stimuli that you wish to add to the batch by marking the checkboxes. Only items or stimuli that are in the Ready for Platform Review level and are not active in another batch are available to be added to a new batch.
 - You can search the list by entering an item or stimulus ID (or partial ID) in the *Search by Entity ID* field.
 - You can also click **Filter** to open the **Filter Entities** window ([Figure 62](#)). The filters take effect on the items and stimuli in the table when you close the window.
 - The first checkbox allows you to set a range of dates between which the items/stimuli are ready for platform review.
 - The second checkbox allows you to click in the text field and select review levels. The **Select FT and OP** button automatically selects Field Test Pool and Locked Operational Pool.
 - The *Type*, *Subjects*, *Grades*, and *Content* checkboxes allow you to filter by item and stimulus attributes.
 - The *Forms* and *Configs* controls allow you to filter by specific forms and/or configs. To add one, enter its ID in the appropriate field and click **Add**.

Figure 62. Filter Entities Window

The screenshot shows the 'Filter Entities' window with the following content:

Please select which entities you wish to see:

Only items ready for PR between 01/01/2020, 12:01 AM and 05/05/2023, 08:43:03 AM

Only items in this review level:

Type	Subjects	Grades	Content	Forms	Configs
<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All	<input checked="" type="checkbox"/> All
<input checked="" type="checkbox"/> Item	<input checked="" type="checkbox"/> ELA	<input checked="" type="checkbox"/> [Blanks]	<input checked="" type="checkbox"/> English	<input type="text"/> <input type="button" value="Add"/>	<input type="text"/> <input type="button" value="Add"/>
<input checked="" type="checkbox"/> Passage	<input checked="" type="checkbox"/> Math	<input checked="" type="checkbox"/> 10	<input checked="" type="checkbox"/> HVRScript		
	<input checked="" type="checkbox"/> Science	<input checked="" type="checkbox"/> 11	<input checked="" type="checkbox"/> SignLanguage		
	<input checked="" type="checkbox"/> Student Help	<input checked="" type="checkbox"/> 12	<input checked="" type="checkbox"/> TTS		
		<input checked="" type="checkbox"/> 3	<input checked="" type="checkbox"/> Wordlist		
		<input checked="" type="checkbox"/> 4	<input checked="" type="checkbox"/> SpanishTranslation		
		<input checked="" type="checkbox"/> 5	<input checked="" type="checkbox"/> SpanishTTS		
		<input checked="" type="checkbox"/> 6	<input checked="" type="checkbox"/> HVRRecording		
		<input checked="" type="checkbox"/> 7	<input checked="" type="checkbox"/> HawaiianTranslation		
		<input checked="" type="checkbox"/> 8	<input checked="" type="checkbox"/> HawaiianTTS		
		<input checked="" type="checkbox"/> 9	<input checked="" type="checkbox"/> SpanishWordlist		
		<input checked="" type="checkbox"/> A	<input checked="" type="checkbox"/> PortugueseTranslation		
		<input checked="" type="checkbox"/> F	<input checked="" type="checkbox"/> PortugueseTTS		
		<input checked="" type="checkbox"/> G	<input checked="" type="checkbox"/> PuniabiTranslation		

- After selecting the items and/or stimuli, click **Create Batch**. The **Create Batch** window opens ([Figure 63](#) and [Figure 64](#)).

Note that as you use this window, orange alert messages may appear to let you know that an item or stimulus does not have the correct grade or subject in FlightPlan. Once the item or stimulus has a grade and subject that match the test from FlightPlan, the alert message disappears.

Figure 63. Create Batch Window (Scrolled to Top)

3. In the *Batch Name* field, enter a name for the batch of items/stimuli.
4. Select the client name from the first dropdown list.
5. From the dropdown lists below, select the test families with which the batch will be associated.
6. Select the platforms for which the batch items and/or stimuli must be tested and approved.
7. Select the accommodations that must be available to the batch items and/or stimuli.

Figure 64. Create Batch Window (Scrolled to Bottom)

8. Under *Temp Users*, select either **All Temp PR Users can access the batch** or **Only the following Temp PR Users can access the batch**. If you select the latter, click in the text field and select the users you want to grant access to.
9. *Optional*: Under *Content*, deselect any items or stimuli you don't want to include in the batch.
10. *Optional*: In the *Special Instructions* field, enter any instructions you want to give to batch reviewers.
11. Click **Create**. If discrepancies exist between FlightPlan and the platform review configuration for the selected client, an error message lists the issues. You will need to fix the discrepancies before you can add the items or stimuli to a batch.

A confirmation message appears when a batch is successfully created.

12. Click **OK** to close the confirmation. The **Platform Review** page displays a status of Creating Batch while ITS generates a new publication and config file of the content. The config file in the Assessment Publications module is labeled "Platform Review" to distinguish it from other configuration files.

The batch appears in the *Review Batches* section ([Figure 61](#)). The configuration is pushed to the TDS team.

13. *Optional*: Click **View** in the *Review Batches* table ([Figure 61](#)) to open the **Platform Review Batch** window, then do either of the following:
 - To edit the settings for a batch, click **Batch Settings**. A settings page opens in the **Platform Review Batch** window, displaying the same settings that were available in the **Create Batch** window. Edit as necessary. Click **Save Settings** or **Cancel**, as desired, to return to the main page of the **Platform Review Batch** window.
 - When a batch is not yet approved, abandon all items and stimuli that have not completed platform review by clicking **Abandon Batch**, then clicking **OK** in the confirmation pop-up. When you've done this, the batch is dissolved, and items and stimuli become available to be added to a different batch.

Platform-Reviewing an Item or Stimulus

You can platform-review an item or stimulus using the *Review Batches* or *Entities Failed Platform Review* sections.

1. Select your user role. The Platform Review - Temp User role performs a review of the platforms and accommodations. The Platform Review - PR Reviewer role (or the Platform Review Administrator role, or another high-level administrator role) can review the results of the Temp Users' work. For help, refer to [Changing User Roles](#).

Depending on your role, either the **Platform Review** page appears, or you can navigate to it by opening the *Admin* menu and selecting **Platform Review Administrator**.

2. *Optional*: To find a batch in the *Review Batches* section, do either of the following:
 - Enter a keyword in the *Search* field to search for a batch name or ID.
 - Click the **Filter** button to open the **Filter Batches** window ([Figure 65](#)). You can filter by selecting a date range, statuses, and/or whether batches are archived. Closing the window applies the selected filters to the list.

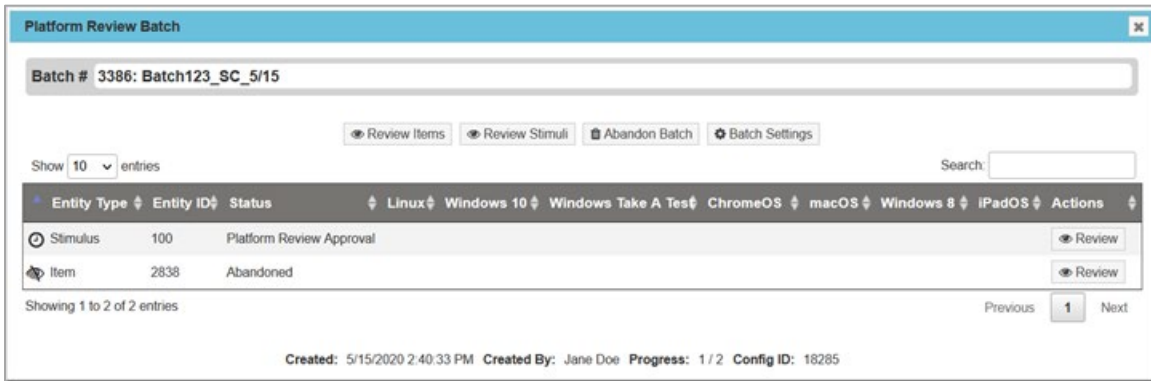
Figure 65. Filter Batches Window

3. *Optional:* To find an item or stimulus in the *Entities Failed Platform Review* section, do either of the following:
 - Enter a partial or complete entity ID in the *Search* field to filter the list.
 - Click the **Filter** button to open the **Filter Failed Entities** window. You can filter by selecting a date range, review levels, and/or other attributes, such as which lanes failed platform review. Closing the window applies the selected filters to the list.

Figure 66. Filter Failed Entities Window

4. If you're using the *Review Batches* section, click the **View** button that appears beside the batch, as in [Figure 61](#). The **Platform Review Batch** window appears ([Figure 67](#)), displaying a table of the items and stimuli in the batch. If you're using the *Entities Failed Platform Review* table, skip this step and proceed to step [5](#).

Figure 67. Platform Review Batch Window



5. Click **Review** beside an item or stimulus. ITS web preview opens in a new browser tab or window. If a batch consists of more than one item or stimulus, you can click **Review Items** or **Review Stimuli** at the top of the table to web-preview them together.
6. Open the **Review** tab in the web preview window and view the **Conduct Review** sub-tab. [Figure 68](#) shows the sub-tab as viewed by a Platform Review - Temp User and [Figure 69](#) shows detail of the sub-tab as viewed by an administrator.
 - As a Platform Review - Temp User, you can use the **Review History** button at the bottom left to open a window that details the history of each review lane.

Figure 68. Web Preview Window: Review Tab: Conduct Review Sub-Tab

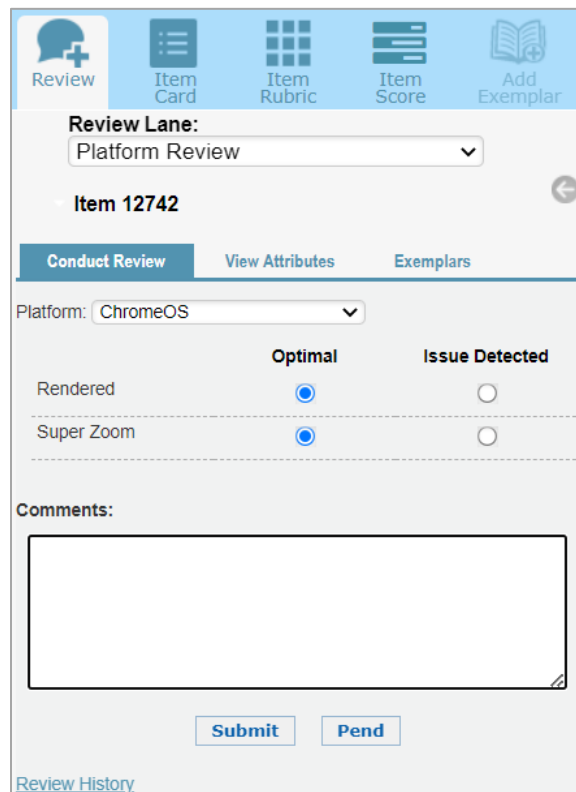


Figure 69. Detail of Web Preview Window: Review Tab: Item Panel: Conduct Review Sub-Tab

Review Level	Outcome	Comments	Review By	Date
Ready For Platform Review	Item Added to Batch	Batch 3646: qapr		3/9/2023 4:46:39 PM

Current Review Step: Platform Review Approval

Review Comments [Expand](#)

[Pend](#) [Approve](#) [Needs Resolution](#)

7. Depending on your role, review by doing one of the following:

- If you are a Platform Review - Temp User, test whether the rendering and any tools or accommodations listed work correctly for the mandatory platforms. Using the dropdown list, select a platform, then make selections from the radio buttons in the table. Enter comments in the *Comments* text box. Click **Submit**. Each platform must be tested and the results submitted by a Temp User.
- If you are a Platform Review - PR Reviewer (or administrator), examine the results of the Temp Users' reviews, including any comments. Enter comments in the *Review Comments* text box. Click the appropriate button.

If the **Copy Options** button appears, you can use it to copy an item's multiple-choice or multiple-select options into your comment. A list of the options appears wherever you placed your cursor in the text field. This is helpful when you want to discuss individual options.

If you specify that an item or stimulus requires resolution, it is marked as having failed platform review.

A confirmation message appears, indicating that your response and comments have been saved. Click **OK**.

The Platform Review Reset Administrator role (and some other high-level admin roles) can reset platform review for a list of items or stimuli. To do so, click **Reset platform review** on the **Platform Review** page. In the window that appears, select either **Items** or **Stimuli**. Click **Browse...** and then upload a text file of IDs from your computer. Click **Reset**. The items or stimuli are moved to the Ready for Platform Review level.

When review is completed, if you have the **Platform Review Batch** window open ([Figure 70](#)), it displays the platform review status of the item or stimulus. The batch is marked Complete in

the Progress column of the table on the **Platform Review** page. Note that even if an item or stimulus is marked as having failed platform review, that column says Complete.

Figure 70. Platform Review Batch Window

Platform Review Batch

Batch # 3386: Batch123_SC_5/15

Review Items Review Stimuli

Show 10 entries Search:

Entity Type	Entity ID	Status	Linux	Windows 10	Windows Take A Test	ChromeOS	macOS	Windows	iPadOS	Actions
Stimulus	100	Platform Review Approval								Review
Item	2838	Abandoned								Review

Showing 1 to 2 of 2 entries Previous 1 Next

Created: 5/15/2020 2:40:33 PM Created By: Suzanne_Delage Progress: 1 / 2 Config ID: 18285

Once platform review is approved for an item or stimulus, the Platform Review swim lane on the **View/Edit** page displays a check mark to indicate that platform review has been completed. However, if an item or stimulus's content is updated, this status is reset, the entity is abandoned from the batch, and users will need to perform platform review for it again. Note that even if an item or stimulus has an approved platform review status, a user can restart platform review at any time by editing it.

If a test form includes any items or stimuli that have failed platform review, a warning message appears when you try to generate a test configuration that includes these entities, as in [Figure 71](#). Before you can proceed, you must mark the acknowledgment checkbox to confirm that you understand.

Figure 71. Publication Page: Configuration Tab

Publications - Publication 1618974 - TestConfig

Choose a different publication

Name	Date	Year	Season	TestCount	FormCount
TestConfig	11/20/2019 12:00:00 AM	2017-2018	Summer	1	1

Attributes Item Properties Tests Cover Page Configurations Config Reports Update From Simulation

Configurations

I acknowledge that the items below are rejected at Platform Review and that I would like to generate a config file that includes these items despite their rejected status: Item 43027, Item 43032

Generate Configuration Draft config Compare to: Pick a config

Show 10 entries Search:

Config ID	Date Generated	Generated By	Status	Download (Excel)	Validation Log	Download Content	Compare To:
20805	2/26/2020 3:00:26 PM	Ezra Auerbach	Succeeded	Download	Download	Content Log	Choose
20000	11/18/2019 10:30:37 AM	Sriatha Cherakoori	Failed		Error: Cannot insert the value NULL into column 'ScorePoints', table 'ITS_TDS_CONFIGURATION_TEST.dbo.tblItems': column does not allow nulls. INSERT fails. Please contact the ITS Helpdesk if this persists.		
19993	11/13/2019 12:56:23 PM	Wei Zhu	Succeeded	Download	Download	Content Log	Choose

Showing 1 to 3 of 3 entries Previous 1 Next

Reviewing Items and Stimuli

Each item and stimulus in ITS goes through a predetermined review sequence. The review process varies from one item bank to another, but always consists of revision, editing, approval within CAI, and approval by the client and appropriate committees. The purpose of the review process is to ensure that items and stimuli are aligned with the test specifications, are appropriate for the students who will be assessed, and fully reflect client content standards.

After an item or stimulus has been thoroughly reviewed and all reviewing parties are satisfied with the product, it is placed in a locked status in ITS. Items in locked status produce a pool of error-free items that meet test and item specifications and can be used on test forms.

You can review items and stimuli using the links that appear when you hover over the *Review* menu in the banner ([Figure 72](#)).

Figure 72. Review Menu Task Groups



Note: The *Review* menu also allows you to perform different actions, such as print reports, web-preview items and stimuli, and move items and stimuli. The actions that you can perform depend on your user role and may vary from one item bank to another. For information on the different types of actions you can perform for items and stimuli, refer to the section [Action Center](#).

After an item or stimulus's English content has been created, it is submitted for review. The item then passes through different review levels in sequential order until the English content is web-approved. Once this happens, additional review lanes are opened to create more content, for example, text-to-speech (TTS), braille, sign language, and rubrics. Content for these additional review lanes can be reviewed in parallel.

Each review lane has its own review levels that need to occur in a set order. The combination of review lanes and review levels is used to determine the current overall review level of an item.

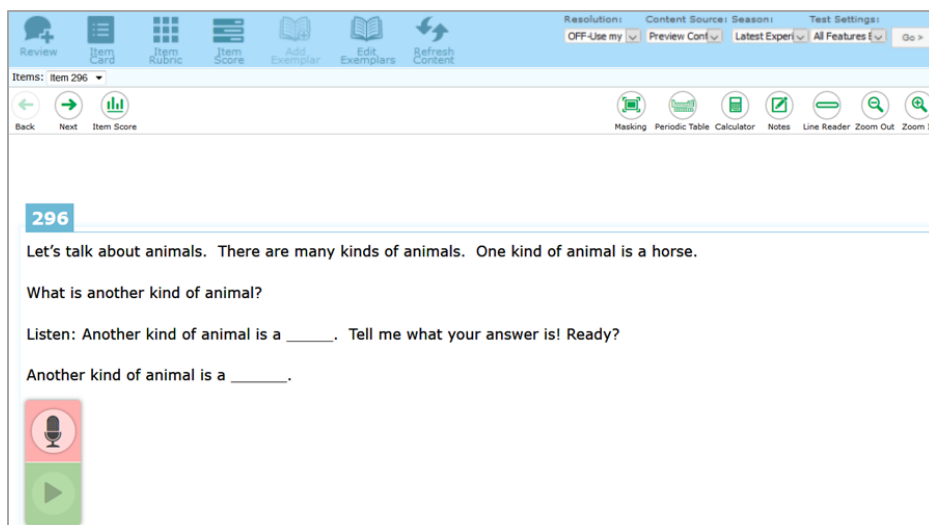
To review an item or stimulus:

1. From the *Item Search* or *Stimulus Search* task group of the *Review* menu, select the subject associated with the item or stimulus you wish to review. This takes you to the ***Item Search*** page ([Figure 57](#)) or the ***Stimulus Search*** page.
2. Search for the items or stimuli you wish to review in the same way that you would search for them from the *Item* or *Stimulus* menu. For information on how to search, refer to [Searching for an Item or Stimulus](#).

Note that the *Review Status* field only displays statuses that are appropriate to your user role. For example, if you are logged in as a Preliminary Reviewer, you can only search for items that are in the Preliminary Review status. However, if you are logged in with the Reviewer Group user role, you can search for all review statuses.

3. From the list of retrieved items or stimuli, select the ones you wish to review by marking the checkboxes next to them.
4. From the **Actions** panel, click **View** and then click **Web Preview**. The selected items' or stimuli's content is displayed in the **Web Preview** window in chronological order.

Figure 73. Item Web Preview Window




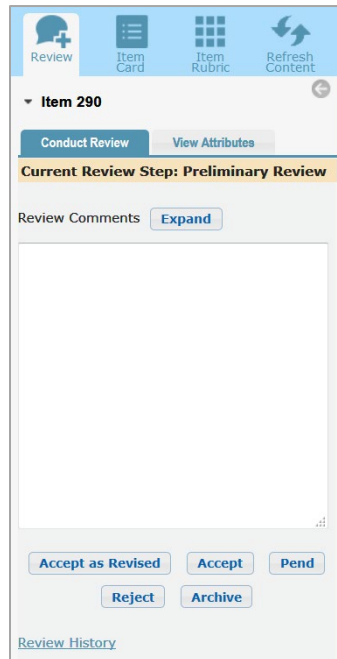
5. Click  to open the Review panel and then click the arrow next to the item or stimulus ID to expand it as shown below.

Figure 74. Review Panel: Conduct Review Tab



6. Do any of the following:
- To view the item or stimulus's attributes, click the **View Attributes** tab.
 - To enter comments about the item or stimulus, use the available text box. Alternatively, to view a larger version of the text box in a pop-up, click **Expand** on the top of the box.
 - To review the item or stimulus's review history, click **Review History** at the bottom of the panel. The **Review History** window appears, displaying previous review comments about the item or stimulus.
7. To select the review outcome, click the appropriate button from the review panel. The buttons that are available may vary from one review level to another and from one item bank to another, as they are configured according to the needs of the project. Available buttons may include the following:
- **Accept:** Indicates that the item or stimulus will be moved to the next level of review without any changes.
 - **Accept as Revised:** Indicates that the item or stimulus will be moved to the next level of review with the modifications made to it.

- **Pend:** Indicates that the item or stimulus will stay at the current level of review until the reviewer selects an option to move the item to the next level.
 - **Reject:** Indicates that the item or stimulus will be moved to the rejected pool and will not be shown to users at subsequent levels of review.
 - **Archive:** Indicates that the item or stimulus will be archived for historical purposes and will not be available at subsequent levels of review.
8. When you select an outcome, a confirmation message appears. Click **OK** to close the message and proceed to the next item or stimulus that you wish to review.

Once you have reviewed an item or stimulus, you will no longer be able to access its content unless you have appropriate review privileges for the level to which it has been moved.

Form and Test Engineering

Once items and stimuli have been created, you can manage test forms, as described in [Managing Forms](#). Once tests and forms have been created, you can assemble tests, as described in [Assembling Tests](#). You can set scoring specifications, as described in [Managing Scoring Specifications](#). And once scoring specifications have been created, you can create blueprints, as described in [Managing Blueprints](#).

You can access the pages for these tasks using the *Form & Test Engineering* menu in the banner.

Managing Forms

From the **Content Form Workspaces** page, depending on your user role, you can create, edit, and review forms, as well as export form workspaces. A form consists of an ordered list of approved items, grouped if necessary into blocks, with a status that indicates what stage it's reached in the review process. A form workspace is where forms are viewed and edited.

The Content Development team performs most of the tasks in this section. The Psychometrics (Tech) team sets technical constraints, as described in [Setting and Referring to Technical Constraints](#), and sometimes other constraints, as described in [Setting and Referring to Other Constraints](#).

Note that many of the steps in the following instructions are not applicable to adaptive tests, only to fixed-form ones.

Using the Content Form Workspaces Page

To get started, hover over the *Form & Test Engineering* menu in the banner and select **Content Form Workspaces**. The **Content Form Workspaces** page appears, listing the available form workspaces within expandable grades and subjects, as in [Figure 75](#).

Figure 75. Content Form Workspaces Page

Name	Workspace Key	Last Updated	Review Level	Edited By	Checked Out By	Flagged from Test Assembly comments	Actions
▼ ASCQ ME (2)							
▼ Grade 1 (1)							
ASCQME_G1_FixedForm_ENU_Online_Fall18-19_	1314	5/30/2023 6:40:27 PM	Form Building	Suzanne_Delage			Open View Archive Duplicate Export
▼ Grade 3 (1)							
ASCQ ME G3 FixedForm ENU Online Fall 22-23 STest3	1441	10/28/2023 12:47:07 AM	Form Building	P_Porlock			Open View Archive Duplicate Export
▼ ELA (130)							
▲ Grade 1 (7)							
▲ Grade 1,2 (4)							
▲ Grade 2 (4)							
▲ Grade 3 (96)							
▲ Grade 4 (18)							
▲ Grade NA (1)							
▲ Math (2)							

- You can search the list using the field in the upper-right corner.
- You can filter the list by clicking **Filter** to open the filter pop-up, selecting the form attributes you want to filter for, and then clicking outside the pop-up to close.

In the filter pop-up, you can sort attributes within a category using the two sort buttons, one alphabetical **AA↓** and one by item count **#↓**. To search for attributes within a category, click in the category header and start typing. To select more than one attribute from a category, use the **Ctrl** or **Shift** key. To clear filters, click the **x** button at the top of a category or click **Clear All** in the upper-right corner.

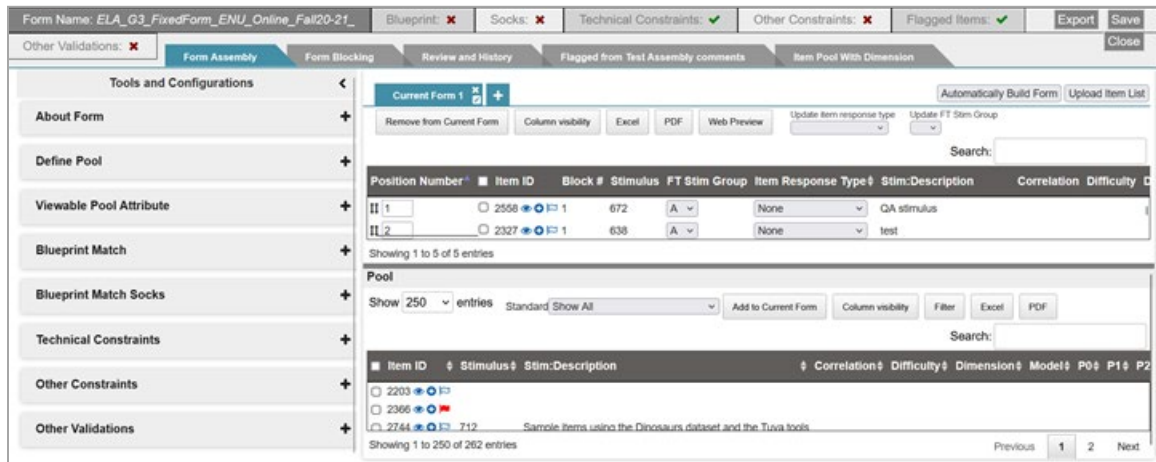
- To archive or un-archive a workspace, click the **Archive** or **Un-Archive** button beside it. Archived workspaces are hidden by default, and you can show them by selecting the **Show archived workspaces?** checkbox. You may want to archive workspaces that are not currently being worked on.
- To export a workspace, including the currently selected form (but no other forms), click **Export** beside it. An Excel (XLSX) file downloads. You may want to do this in order to share the workspace for review.
- To change which columns are visible, click **Column visibility** and select or deselect options from the pop-up that appears. Click outside the pop-up to apply your changes.
- To export the entire list, excluding columns hidden using **Column visibility**, click **Excel** (for XLSX) or **PDF**.
- To duplicate a workspace, expand the list to find it and click **Duplicate** beside it. The duplicate workspace opens. You'll need to edit its name, as described in [Setting Basic Form Attributes](#), before you can save it. You may want to do this when you're reusing one of last year's forms with minor edits.

Creating a New Form Workspace

You can create a new form workspace from the **Content Form Workspaces** page described in [Using the Content Form Workspaces Page](#). A form workspace always contains at least one form. It can contain more than one, but it must contain only one when it is reviewed and advanced to a new status.

1. Click **Create New Workspace**. The **Content Form Workspace** page appears, opened to the **Form Assembly** tab, as in [Figure 76](#).

Figure 76. Content Form Workspace Page: Form Assembly Tab Containing One Form, with Items



2. Perform or have other users perform the tasks in the following sections, saving as in step [3](#) when necessary:
 - a. [Setting Basic Form Attributes](#): This is done in the **About Form** panel.
 - b. [Defining the Pool of Items](#): This is done using the **Define Pool** panel. It defines the pool of items that are eligible to be included in forms. The item attribute columns can be customized in multiple ways.
 - c. [Commenting on a Workspace Item](#): Optionally, an item within the workspace can have one comment to be shared among the users working on the workspace.
 - d. [Flagging a Workspace Item as Do Not Use](#): You can optionally flag an item in a workspace as Do Not Use (DNU).
 - e. [Comparing a Fixed Form to Its Associated Blueprint](#): This is done in the **Blueprint Match** and **Blueprint Match Socks** panels.
 - f. [Setting and Referring to Technical Constraints](#): Psychometrics (Tech) team members set these constraints in the **Technical Constraints** panel and Content Development team members refer to them as they work.
 - g. [Setting and Referring to Other Constraints](#): Content Development team members, as well as Psychometrics (Tech) team members in some cases, set other constraints in the **Other Constraints** panel. Content Development team members refer to these constraints as they work.
 - h. [Referring to Other Validations](#): This is done in the **Other Validations** panel.

- i. [Creating and Deleting Forms Within a Workspace](#): You can optionally create new forms manually or automatically, drawing on the pool of items you defined in step [b](#) above.
- j. [Adding and Removing Items](#): You may optionally add items to a form from the pool you defined in step [b](#) above, as well as remove them. As you add and remove items, you may need to refer back to the blueprint comparisons and constraints to make sure you conform to them.

To view more item dimensions than are displayed in the form and item pool tables, refer to [Viewing Multiple Dimensions of an Item](#).





- k. [Updating Multiple Choice Item Response Type](#): You can update the item response types for Multiple Choice (MC) items on the form.
 - l. [Setting Field Test Stimulus Groups](#): You may set field test (FT) stimulus groups for items on a form.
 - m. [Setting Blocks](#): Some forms require blocks, which are set in the **Form Blocking** tab.
3. Click **Save**. In the pop-up that appears, enter a comment describing the changes you made, and include any information that may be relevant or helpful to others. Click **OK**. The whole workspace saves.

Viewing and Editing a Form

You can view and edit forms from the **Content Form Workspaces** page described in [Using the Content Form Workspaces Page](#).

To open a form workspace, expand the list and click **Open** beside it (or **View** to view without making edits). The **Content Form Workspace** page appears, displaying a form or forms. If more than one form is present, select the form tab you want to view and/or edit. Proceed to edit as described in steps [2–3](#) of [Creating a New Form Workspace](#).

- Alongside the form workspace name at the top, the page indicates with green check marks or red Xes whether the current form matches the blueprint standards and SOCKs, whether it meets the technical constraints and other constraints, whether any of its items are flagged, and whether it passes other validations.
- The form workspace is initially open to the **Form Assembly** tab, which contains a tab for each form (the first default one being **Current Form 1**). To the right of the **Form Assembly** tab are the **Form Blocking**, **Review and History**, **Flagged from Test Assembly comments**, and **Item Pool With Dimension** tabs.

- If the form has been flagged during the test assembly process, a red warning icon appears on the **Flagged from Test Assembly comments** tab. The tab displays the flagger's comment explaining the issue that needs to be addressed. Note that saving the workspace automatically deletes the flag and comment.
- To expand and collapse one of the panels, use the **+** and **-** buttons. To change it to fullscreen display and back, use the  and  buttons. To undock and redock it, use the  button. You can also click and drag the panels into a different order.
- To edit the name of the current form, click  to the right of the existing name. Enter the new name in the window that appears. Then click **Update Name**.
- To download the contents of either of the item tables within a form tab under the **Form Assembly** tab, click **Excel** (for XLSX) or **PDF** above the table. The downloaded file includes all the viewable pool attributes except for those hidden using **Column visibility**.
- To export the workspace, including the current form but no other forms, click the **Export** button in the upper-right corner. An Excel (XLSX) file downloads. You may want to do this in order to share a form and its workspace for review.
- To preview the form content in a new browser tab or window, click **Web Preview** above the table of items.
- To close the workspace, click **Close**.

Setting Basic Form Attributes

1. To edit the basic details of all forms in the workspace, expand the **About Form** panel by clicking the expand button **+**, then click **Edit**.

Figure 77. Content Form Workspace Page: About Form Panel (Editable)

The screenshot shows the 'About Form' panel with the following fields and values:

- Subject: Math
- Grade: 4
- Style: FixedForm
- Season: Fall
- Year: 2024-2025
- Form Language: ENU
- Form Mode: Online
- Form Name Modifier: (empty)
- Test Key: 122918 - (AIR)AIR-GEN-PR-UD-MA-ITSX-4-Fall-2020-...
- Reference Tests: 122918 - (AIR)AIR-GEN-PR-UD-MA-ITSX-4-Fall-2020-20...
- Reference Forms: 2310 - PR_242_118_Mathematics_4_ENU_PR2 G4 Math...
- Reference Workspaces: (empty)

At the bottom, there is a checkbox labeled 'Don't filter by Subject and Grade' and two buttons: 'Save' and 'Cancel'.

- In the editable **About Form** panel ([Figure 77](#)), select dropdown list options and fill out the fields.
 - Note that any text optionally entered in the *Form Name Modifier* field will appear at the end of the workspace's and form's automatically generated name.
 - From the *Test Key* dropdown list, select the test key that the form(s) will be using. The test key defines the blueprint.

Later, you will be able to compare any selected form to the test key using the **Blueprint Match** and **Blueprint Match Socks** panels. Also, at the top of the workspace, to the right of the form workspace name, the "Blueprint" and "Socks" flags indicate whether the current form matches the blueprint standards and SOCKs with green check marks or red Xes.

- Optional:* Use the *Reference Tests* field, then the *Reference Forms* and/or *Reference Workspaces* fields. A reference form is a form, usually from a prior administration, that uses the same technical constraints as the current form. You will be able to view a comparison of the reference form with the current form in the **Technical Constraints** panel.

The *Reference Tests* field filters the fields below it to include only the forms found on the selected test(s).

The available reference tests and forms are restricted by the subject and grade selected, unless you mark the **Don't filter by Subject and Grade** checkbox.

To use these fields, click inside them and make selections from the dropdown list that appears, or start typing to search. Repeat to select more or deselect, or click the remove button (X) to remove one of the options.

3. Click **Save**. The automatically generated form name (for example, "ELA_G12_FixedForm_ENU_Online_Spring21-22_test-form") appears in the upper-left corner.

Defining the Pool of Items

The pool of items you define will be available to add to any form in the workspace.

1. Click **+** to expand the **Define Pool** panel, as in [Figure 78](#).

Figure 78. Content Form Workspace Page: Define Pool Panel

2. Click **Item Search**. The **Pool Item search** window appears ([Figure 79](#)). It closely resembles the **Item Search** page described in [Searching for an Item](#).

Figure 79. Pool Item Search Window

3. Follow the instructions in [Searching for an Item](#), steps [2–5](#).

4. To close the ***Pool Item search*** window and load the search results in the Pool table, click **Add Results to Pool**.
5. *Optional*: Select **Include items with active parent standards**. When this checkbox is marked, if any part of a standard to which a matching item is aligned is active on the test, the item will be included in the pool.

For example, suppose a matching item is aligned to the standard A|1|1, and the standard A|2 is active on the test but A|1|1 is not. If the checkbox is marked, the item will be included because the two standards share a parent (A). The item will *not* be included if the checkbox is cleared, because the standard to which it is aligned is not identical to any standard active on the test.

6. *Optional*: To narrow down the pool results to a specific item ID list:
 - a. Select **Filter item pool by a fixed list of items**.
 - b. Click **Upload Item List**.
 - c. In the window that appears, click **Browse...** and select your saved text file from your computer.
 - d. If the ***Items Not In Pool*** window appears, read the message to learn which items are omitted from the pool. Close the ***Items Not In Pool*** window.

In the **Define Pool** panel, the *Items that will appear in the pool* field displays the item ID list, as in [Figure 80](#). This list includes all items included in the upload, even if omitted from the pool.

Figure 80. Content Form Workspace Page: Define Pool Panel (Pool Defined by Search and Filtered by Item List)

Define Pool

SearchCriteria:
Subject: ELA Review Levels: Alignments Approve
Pending status: All items in selected status


Item Search

Include items with active parent standards.
 Filter item pool by a fixed list of items

Items that will appear in the pool:



151
153

Update filter list: Upload Item List

Once you've defined a pool, you can use the preview button  beside each item ID to preview the item in a new browser tab or window. This button will also be available on items you add to forms.

There are two ways to filter the Pool table, apart from the *Search* field:


- Click the **Filter** button. Select the item attributes you want to filter for, then click outside the pop-up.




In the filter pop-up, you can sort attributes within a category using the two sort buttons, one alphabetical  and one by item count . To search for attributes within a category, click in the category header and start typing. To select more than one attribute from a category, use the **Ctrl** or **Shift** key. To clear filters, click the **x** button at the top of a category or click **Clear All** in the upper-right corner.

- Use the *Standard* dropdown list. You may choose to view only those standards that fall below the blueprint minimum, only those that fall above the blueprint maximum, or all standards.

Commenting on a Workspace Item



You can add or edit a comment on any item in a workspace. Comments persist across the pool and forms within the workspace. Each item can have one comment, which can be viewed and edited by anyone viewing the workspace.

To add a new comment, click  beside the item and enter your comment in the window that appears. A helpful comment might mention, for example, that the item was used previously.

Click **Save**. The add button icon  changes to an edit icon . To view, edit, and/or delete an existing comment, click  to reopen the window.

Flagging a Workspace Item as Do Not Use

You can flag an item in a workspace as Do Not Use (DNU) when the workspace is editable. The Do Not Use flag persists across the pool and forms within the workspace.

You can flag an item by clicking the blue and white flag button  beside it. The flag button turns red . Click again to unflag it.

At the top of the workspace ([Figure 76](#)), to the right of the form name, the “Flagged Items” marker has a green check mark if no flagged items are present on the current form, or a red X if flagged items are present on it.

Customizing Columns in the Item Tables

You can customize the non-essential columns displayed in the forms and item pool in multiple ways. You will want to do this to better understand the items you are placing on the form. Note that essential columns, such as *Item ID*, cannot be hidden even temporarily, nor can they be reordered.

To display a different set of columns across the item pool and forms:


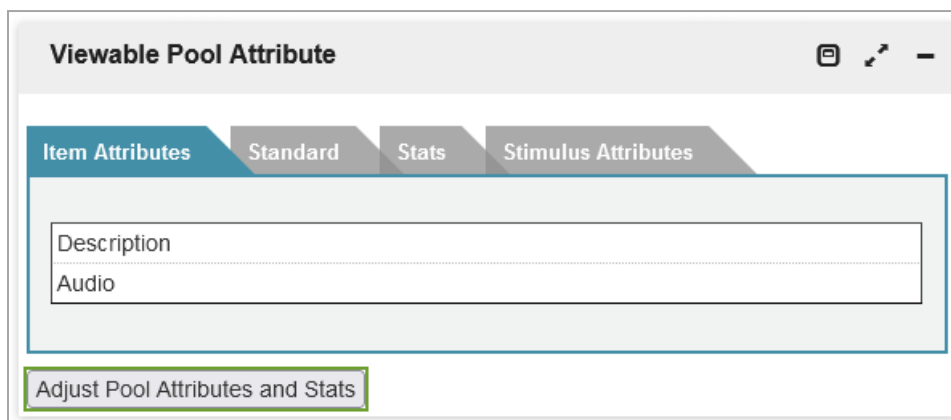
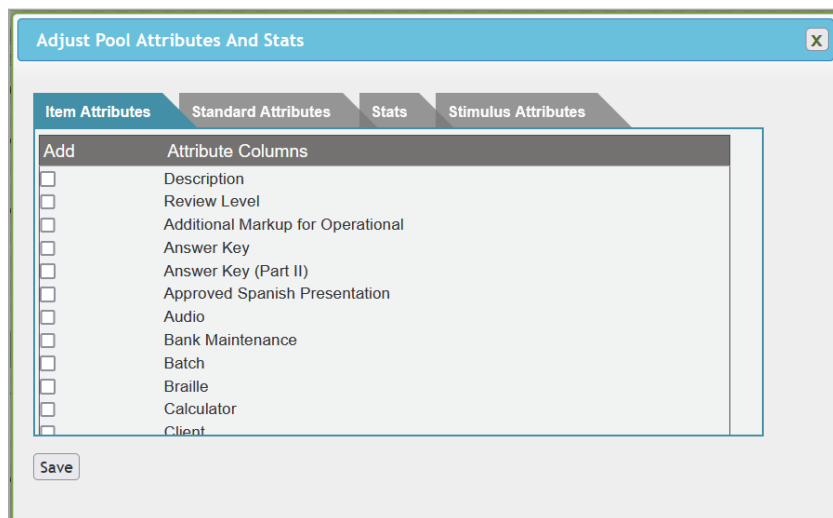
1. Click  to expand the **Viewable Pool Attribute** panel, as in [Figure 81](#). The currently displayed attributes and stats are listed in the **Item Attributes**, **Standard**, **Stats**, and **Stimulus Attributes** tabs.

Figure 81. Content Form Workspace Page: Viewable Pool Attribute Panel



2. Click **Adjust Pool Attributes and Stats** at the bottom of the panel. The window that appears ([Figure 82](#)) contains four similar tabs. Use the checkboxes in these tabs or click the **Add All** or **Remove All** buttons below the lists. Click **Save**. The window closes and the columns adjust across the item pool and all forms in the workspace. This customization can be saved with the workspace.

Figure 82. Adjust Pool Attributes And Stats Window: Item Attributes Tab



To temporarily hide non-essential columns in one of the tables, click **Column visibility** above the table and deselect some columns from the pop-up, then click outside it. You can open the pop-up again and reselect columns. This customization applies to a single table, and it persists only until you access a different form or close the workspace.

You can reorder non-essential columns by dragging and dropping the column headers in either the current form or the item pool. The order of those columns is shared across the item pool and all forms in the workspace. This customization can be saved with the workspace.

All these customizations are reflected in exports.

Comparing a Fixed Form to Its Associated Blueprint

Almost all fixed forms will need to be compared to their associated blueprints.

To determine how well the currently selected form matches the blueprint you selected when [setting basic form attributes](#), click **+** to expand the **Blueprint Match** and/or **Blueprint Match Socks** panels, as in [Figure 83](#) and [Figure 84](#). The two panels are very similar, except that the first one lists standards and the second lists SOCKS.

Figure 83. Content Form Workspace Page: Blueprint Match Panel

Test Object	Level	Min	Max	Current	Pool Count
Total Items					
	0		3		452

Showing 1 to 1 of 1 entries

Figure 84. Content Form Workspace Page: Blueprint Match Socks Panel

Test Object	Level	Min	Max	Current
AIR-ELA-v2:DOK1	1	0	0	0
AIR-ELA-v2:DOK2	1	0	0	0
AIR-ELA-v2:DOK3	1	0	0	0

Showing 1 to 3 of 3 entries

- The Test Object column displays a list of the standards or SOCKs in the blueprint.
 - The Level column displays the level of the standard or SOCK in the hierarchy.
 - The Current column displays the number of units (items or points) aligned to each standard/SOCK.

- In the **Blueprint Match** panel, the Pool Count column displays the number of units (items or points) in the whole workspace that are aligned to each standard.
 - The Min and Max columns represent the blueprint parameters defining the minimum and maximum number of units (items or points) that should align to each standard/SOCK.
- If the blueprint does not contain SOCKs, then no SOCK data are available.
 - To search all columns in the list of standards or SOCKs in a table, type in the *Search* field above it.
 - Rows are color-coded red or yellow if the standards/SOCKs have too few or too many items for the blueprint parameters. To view only the too-high or too-low standards/SOCKs, select **Too High** or **Too Low**. Click **All** to view all.
 - At the top of the workspace, to the right of the form name, the “Blueprint” and “Socks” flags indicate whether the form matches the blueprint standards and SOCKs with green check marks or red Xes.

Refer to these tables to help your form stay within blueprint parameters. You will likely go back and forth between consulting these tables and adding or removing items as described in the section [Adding and Removing Items](#).

Setting and Referring to Technical Constraints

Technical constraints are constraints on statistical item properties that take real number values. Psychometricians can [set constraints](#) in the **Technical Constraints** panel, and the Content Development team can [refer to these constraints](#) in order to make forms meet them using the instructions in [Adding and Removing Items](#).

To get started, click  to expand the **Technical Constraints** panel ([Figure 85](#)).

The panel contains a table of the constraints present, followed by some graphs and sometimes other tables that display technical information about the current form.

Figure 85. Content Form Workspace Page: Technical Constraints Panel (Unpopulated with Constraints and Scrolled to Top)

Constraints can be on single values, theta statistics, or proficiency levels. [Table 6](#) lists the types of theta statistics that appear in the graphs and can be constrained. You can view and constrain both difference (diff) and non-difference theta statistics. The non-diff statistics represent statistical calculations derived from the current form, and the diff statistics compare current form items to reference form items.

Table 6: Types of Theta Statistics

Type	Description
Test Characteristic Curve (TCC)	A Test Characteristic Curve shows the relationship between the ability score estimated by the model (IRT3pl, IRT3pln, IRTPCL, IRTGPC, IRTGRL, IRTComposite) and the expected score, which is calculated differently for each model.
Standard Error of Measurement (SE or SEM)	Standard error of measurement is the amount of uncertainty expected for a given set of items and theta level.

Type	Description
Information	Test Information Function (TIF) is the sum of the Item Information Function (IIF) for all items. The IIF describes how well or precisely an item measures at each level of the trait that is being measured by a given test (theta). In item response theory (IRT), the term "information" is used to describe reliability or precision of an item or a whole instrument.

Setting Technical Constraints

You can set three types of technical constraints: [theta](#), [single value](#), and [proficiency level](#).

Theta Constraints

1. Click **Add Theta Constraint**. The **Add Theta Constraint** window appears ([Figure 86](#)).

Figure 86. Add Theta Constraint Window: TCC Simple

The screenshot shows a dialog box titled "Add Theta Constraint". It has a light blue header bar with a close button (X) on the right. Below the header, there is a text input field labeled "Name:" containing the text "TCC". Underneath, there are three radio button options: "TCC Simple" (which is selected with a blue dot), "TCC Split Range", and "Each Theta". Below these options is a text input field labeled "Max TTC Difference:" containing the number "0". At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

2. Select either **TCC Simple**, **TCC Split Range**, or **Each Theta**.
 - If you selected **TCC Simple**, as in [Figure 86](#), enter the maximum TCC difference that will be tolerated for any theta.

This is a constraint on the allowed absolute difference in Test Characteristic Curve (TCC) of the reference form and current form for a range of theta values. The same tolerance is applied throughout the entire range of data.

- If you selected **TCC Split Range**, as in [Figure 87](#), drag one of the handles on the **Split at Theta** range tool. The other handle automatically moves to the position with the same absolute value and the range is split into three sections. Then enter the maximum TCC difference for each section in the fields. The upper and lower sections always have the same value.

As with the **TCC Simple** option, this is a constraint on the allowed absolute difference in Test Characteristic Curve (TCC) of the reference form and current form for a range of theta values. Unlike with **TCC Simple**, different tolerances are applied for different ranges of data.

Figure 87. Add Theta Constraint Window: TCC Split Range

- If you selected **Each Theta**, as in [Figure 88](#), follow the steps below.
 - From the *Constraint on* dropdown list, select what the constraint is intended to constrain.
 - Enter values in either or both of the two tables.
 - In the first table, you can enter values for the minimum and maximum theta cutoffs.
 - In the second table, you can enter custom thetas and their minimum and maximum cutoff values; if the custom table contains the same thetas as the first table, the custom values for those thetas override the ones in the first table. Use the **Add Row** button to add a new row at the bottom. Use **Remove Row** to remove the last row in the table.

Figure 88. Add Theta Constraint Window: Each Theta

3. *Optional*: Edit the name of the constraint as desired.
4. Click **Save**. The **Add Theta Constraint** window closes. The theta constraint appears in the table, which indicates whether or not the constraint is met with a green check mark or red X.

To edit or delete the theta constraint, select the row and click **Edit** or **Delete**. You can also use the **Add / Edit** button below each graph to add or edit whichever constraint corresponds to that graph.

To disable the constraint, clear the checkbox in the Enabled column.

Single-Value Constraints

1. Click **Add**. The **Add/Edit Technical Constraint** window appears ([Figure 89](#)).
2. Enter a meaningful name for the constraint. For example, Average Difficulty, Average P-Value, or Correlation Minimum .23.
3. From the *Attribute* dropdown list, select the item statistic for the constraint, such as **Difficulty**, **PValue**, or **Correlation**.
 - Note that difficulty for polytomous items is computed as the average of the IRT difficulty parameters for the item.
4. From the *Base* dropdown list, select either **Item Based** or **Point Based**. Note that the base option is relevant only for averages, not for sums, minimums, or maximums, which work the same way regardless of base. The base determines whether an average statistic will be multiplied (weighted) by the items' points. The points are taken from the item parameters or, if statistics are not available, from the IAT Max Score in the rubric.
5. From the *Grouping Operator* dropdown list, choose the function that is applied to the item statistics for the set of items selected on the form.

- **Avg:** Takes the (weighted) average of the item statistics. For example, you could constrain the average difficulty of items on the form. If the constraint is item-based, the denominator is the number of items. If the constraint is point-based, the denominator is the sum of the score points over items.
 - **Sum:** Takes the sum of the item statistics. For example, you could constrain the total number of points attainable on the form by selecting the item statistic **Points** and the function **Sum**.
 - **Min:** Takes the minimum of the item statistics, for example, the item with the lowest difficulty.
 - **Max:** Takes the maximum of the item statistics, for example, the item with the highest difficulty.
6. *Optional:* Clear the **Is Strict Constraint** checkbox to indicate that the constraint need not necessarily be met.
7. Enter the target value and tolerance. Technical constraints are specified with a target value and a tolerance that specifies the allowed deviation from the target. A tolerance of 0 means the constraint has to be met exactly, which is not realistic for real-valued constraints but may be for integer-valued ones. The target and tolerance values can be translated into a minimum and maximum acceptable value as follows:

$$\text{min}=\text{target}-\text{tolerance}$$

$$\text{max}=\text{target}+\text{tolerance}$$

Sometimes the user may want to specify a technical constraint directly as a minimum and/or maximum value. Right now, this is not supported, but minimum and maximum values can be translated into target and tolerance values as follows:

$$\text{target}=(\text{min}+\text{max})/2$$

$$\text{tolerance}=\text{max}-\text{target}$$

Or, equivalently:

$$\text{tolerance}=(\text{max}-\text{min})/2$$

$$\text{target}=\text{min}+\text{tolerance}$$

For example, the constraint that the minimum p-value is .1 can be specified as follows:

$$\text{target}=(.1+1)/2=.55$$

$$\text{tolerance}=1-.55=.45$$

Or, equivalently:

$$\text{tolerance} = (1 - .1) / 2 = .45$$

$$\text{target} = .1 + .45 = .55$$

Note that, because there is no real maximum constraint on the p-value in this case, the highest possible value is used for the maximum ($p=1$).

Figure 89. Add/Edit Technical Constraint Window: Minimum P-Value .1

As another example, an average difficulty constraint could have a target of 0 and a tolerance of .1.

8. Click **Save**. The **Add/Edit TCC Constraint** window closes. The new constraint appears in the table, with the actual form value listed in the Current column beside the target and tolerance values.

To edit or delete a constraint, select the radio button in the rightmost column of the table and click **Edit** or **Delete**. To disable the constraint, clear the checkbox in the Enabled column.

Proficiency Level Constraints

A proficiency constraint sets the maximum number of points by which proficiency level raw cut scores can differ between the current form and the reference form.

For example, suppose the raw cut score for level 2 (separating it from level 1) is x on the reference form and $x+9$ on the current form. If a proficiency constraint specifies a maximum difference of 8 points for level 2, the form will not meet the constraint. Likewise, if the current form's level 2 raw cut score is $x-9$, it will not meet the constraint.

1. Click **Add Proficiency Constraint**. The **Add Proficiency Level Constraint** window appears.

Figure 90. Edit Proficiency Level Constraint Window

Name:

Enter the maximum difference allowed when points transition to a new proficiency level:

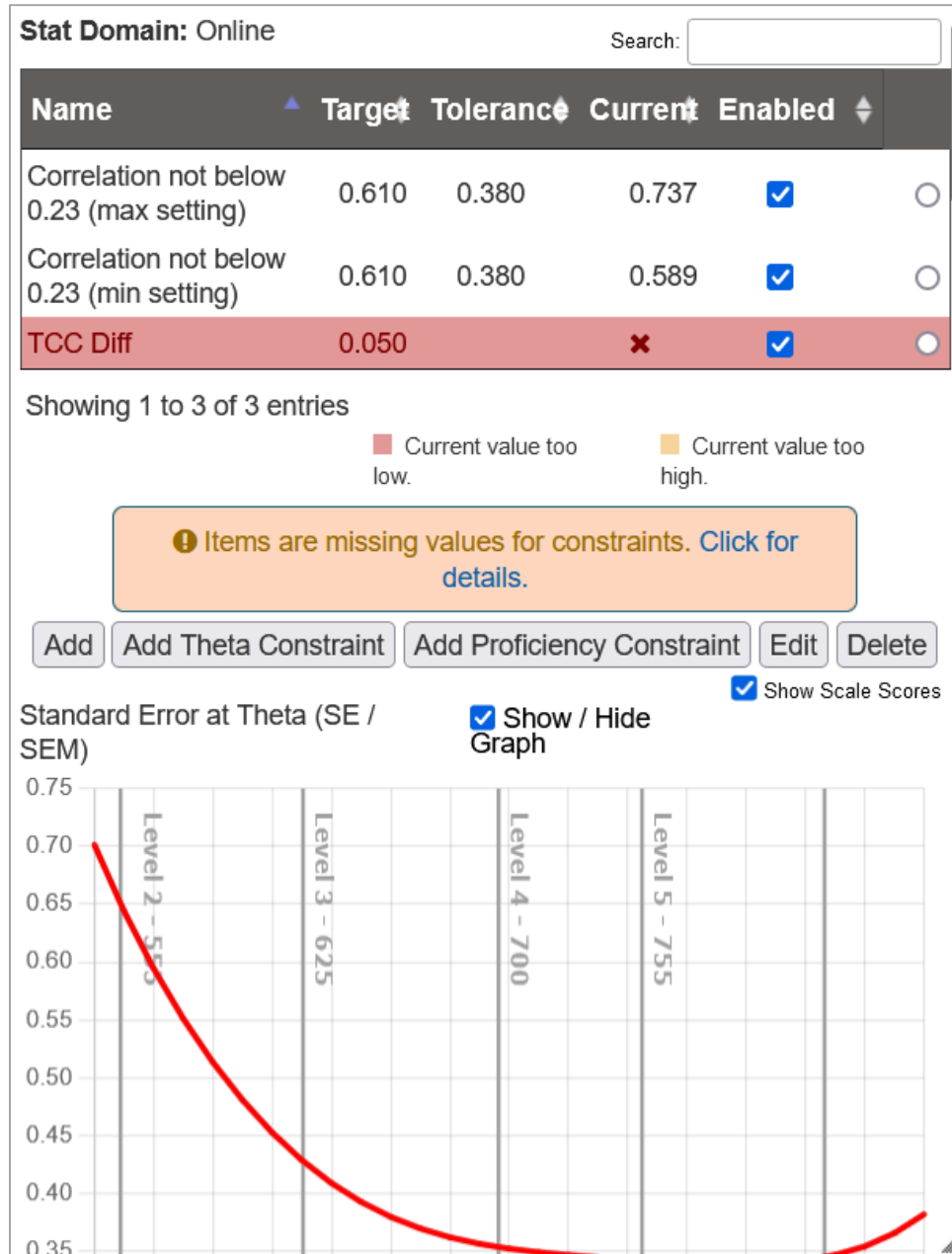
Level	Max Difference
2 - On grade	8

2. Enter a meaningful name for the constraint.
3. In the blank table row provided, select a proficiency level from the dropdown list and enter the maximum difference between the current and reference form raw cut scores for that level.
4. *Optional:* To add more levels below, select **Add Row** and repeat step [3](#).
5. *Optional:* To delete the last row in the table, select **Remove Row**.
6. Select **Save**. The **Add Proficiency Level Constraint** window closes. The new constraint appears in the table, which indicates whether or not the constraint is met with a green check mark or red X.

To edit or delete a constraint, select the radio button in the rightmost column of the table and click **Edit** or **Delete**. To disable the constraint, clear the checkbox in the Enabled column.

Referring to Technical Constraints

Figure 91. Content Form Workspace Page: Technical Constraints Panel (Populated and Scrolled to Top)



Once items have been added to the form following the instructions in [Adding and Removing Items](#), you will be able to determine whether technical constraints are met.

- The first table (shown at the top of [Figure 91](#)) displays the target, tolerance, and current values. A theta constraint is too complex to be represented by a single current value, so a green check mark or red X in the Current column indicates whether the constraint is met. The table rows are color-coded red or yellow if items on the form have values too low or too high to meet the constraints. To search all columns in the table, type in the *Search* field above it.
- At the top of the workspace ([Figure 76](#)), to the right of the form name, the “Technical Constraints” flag has a green check mark or red X to indicate whether or not all the constraints are met.

Sometimes a constraint cannot be applied because some items lack certain attributes; for example, a difficulty constraint cannot be applied if one of the items lacks the difficulty attribute. In such a case, a message appears below the constraint table explaining this and allowing you to open a window containing more details.

Below the constraint table are multiple graphs and in some cases more tables. You can hide a graph by clearing the **Show / Hide Graph** checkbox above it, or show it by marking the checkbox. Note that if there are no reference form items, the difference (diff) graphs are hidden entirely. Each graph shows performance level cutoffs. To view the scale score associated with each cutoff, select **Show Scale Scores** at the top right corner of the first graph.

The graphs and tables are as follows:

- **Standard Error at Theta (SE / SEM)** (graph, shown in part at the top of [Figure 91](#)): Standard error for a range of theta values. The gray line represents the reference form and the colored line represents the current form.
- **Standard Error Difference at Theta (SE / SEM)** (graph): Difference between standard error at theta on the current form and on the reference form.
- **Expected percent correct at Theta (TCC)** (graph): Expected percent correct for a range of theta values (this is the Test Characteristic Curve (TCC) divided by the total number of raw score points on the test). The gray line represents the reference form and the colored line represents the current form.
- **TCC Difference** (graph): The difference between the normalized Test Characteristic Curves of the reference form and the current form.
- **Information at Theta** (graph): The sum of the information on each item in the current form. The gray line represents the reference form and the colored line represents the current form.
- **Information Diff at Theta** (graph): The sum of the information on each item in the current form minus the same sum for the reference form.

- **Scale Score & Conversion Table (Figure 92):** If this table is not displayed by default, select **Show Conversion Table** to display it. A comparison of the reference form to the current form based on scale scores and performance levels. It can be very helpful if a client has special rules about where a form's raw score cuts fall and how different they are from the reference form.

Note that when a proficiency level constraint is present and there is no reference form, the conversion table displays the reference form numbers as infinite, but the constraint is regarded as valid.

To search all columns in the table, type in the *Search* field above it.

Figure 92. Content Form Workspace Page: Technical Constraints Panel: Scale Score & Conversion Table

Reference Test				Current Form			
Raw Score	Theta Score	Scale Score	Performance Level	Raw Score	Theta Score	Scale Score	Performance Level
0	-4.9176	-4	Below Scale	0	-3.6041	-3	Below Scale
1	-4.1004	-3	Below Scale	1	-2.9902	-2	Below Scale
2	-3.3595	-2	Below Scale	2	-2.1967	-1	Below Scale
3	-2.9031	-2	Below Scale	3	-1.7120	-1	Below Scale
4	-2.5644	-2	Below Scale	4	-1.3856	0	On grade
5	-2.2890	-1	Below Scale	5	-1.1241	0	On grade
6	-2.0534	-1	Below Scale	6	-0.9034	0	On grade
7	-1.8447	-1	Below Scale	7	0.7107	0	On grade
8	-1.6554	-1	Below Scale	8	-0.5382	0	On grade
9	-1.4808	0	On grade	9	-0.3808	1	On grade
10	-1.3171	0	On grade	10	0.2353	1	On grade
11	-1.1624	0	On grade	11	-0.0989	1	On grade
12	-1.0149	0	On grade	12	0.0302	1	On grade
13	-0.8729	0	On grade	13	0.1634	1	On grade
14	-0.7359	0	On grade	14	0.2719	1	On grade
15	-0.6029	0	On grade	15	0.3867	1	On grade
16	-0.4733	1	On grade	16	0.4985	1	On grade
17	-0.3465	1	On grade	17	0.6052	2	Above Grade
18	-0.2223	1	On grade	18	0.7164	2	Above Grade
19	-0.1001	1	On grade	19	0.8235	2	Above Grade
20	0.0203	1	On grade	20	0.9302	2	Above Grade
21	0.1393	1	On grade	21	1.0369	2	Above Grade

- **Summary Table (Figure 93):** This customizable table provides additional information comparing the current form to the reference form based on specified criteria. To display this table, select a table name from the dropdown list.

Users with permissions to create technical constraints can also configure summary tables for the bank. If no table exists in the dropdown list, or if you wish to create a new one or edit an existing one, click **Configure** and follow these steps in the pop-up that appears:

- Either select an existing table from the dropdown list at the top right, or click **Create New Table**. If creating a new table, enter a name in the *Name* field.
- To add a blank row, click **Add Row**.
- Edit any row by choosing a sequential row number, entering a meaningful criterion name (for example, "Total Items" or "Average Difficulty"), and selecting an attribute and function from the dropdown lists.
- Optional:* To delete a row, click **Delete** beside it.
- Optional:* To delete the selected table, click **Delete Table**. Click **OK** in the confirmation pop-up that appears.

- f. Repeat the steps above as necessary. Click **Save**. The pop-up closes and the new or edited table is available to view.

Figure 93. Content Form Workspace Page: Technical Constraints Panel: Summary Table

Summary Table: Another New Table Configure		
Name	Reference Form	Current Form
Total Items	37	14
Max Points	61	17
Avg Difficulty	-0.014375	0.001451
Min Difficulty	-2.130250	-1.273560
Max Difficulty	2.059230	0.715390
Avg PValue	0.613557	0.542281

Setting and Referring to Other Constraints

Other constraints are not based on a blueprint, SOCKs, or statistics. In the **Other Constraints** panel, you may [add as many or as few other constraints as necessary](#), then [refer back to them](#) in order to make the form meet them using the instructions in [Adding and Removing Items](#). These constraints are set primarily by the Content Development team and sometimes by the Psychometrics (Tech) team.

To get started, click **+** to expand the **Other Constraints** panel.

The panel contains a table. Before other constraints are set, the table is unpopulated, as in [Figure 94](#).

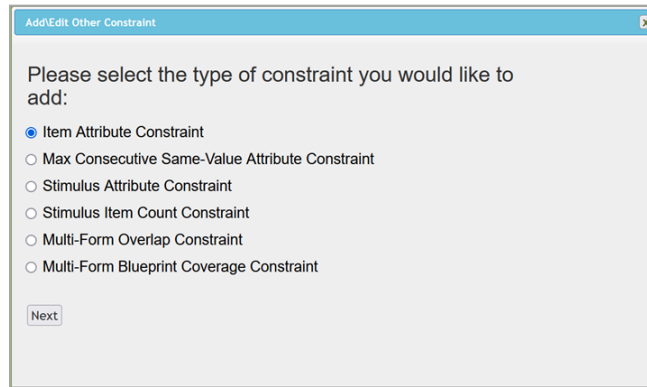
Figure 94. Content Form Workspace Page: Other Constraints Panel (Unpopulated with Constraints)

Other Constraints					
Search: <input type="text"/>					
Name	Min	Max	Current	Enabled	Pool Matching
No data available in table					
Showing 0 to 0 of 0 entries					
			■ Current value too low.	■ Current value too high.	
<input type="button" value="Edit"/> <input type="button" value="Delete"/> <input type="button" value="Add"/>					

Setting Other Constraints

1. Click **Add** to add a constraint. The **Add/Edit Other Constraint** window appears ([Figure 95](#)).

Figure 95. Add/Edit Other Constraint Window



2. Select the type of constraint and click **Next**. Enter a descriptive name for the constraint, for example, Choice Interaction Type and Grade 3. Set the constraint as described in the following sections:
 - [Setting an Item Attribute Constraint](#)
 - [Setting a Max Consecutive Same-Value Attribute Constraint](#)
 - [Setting a Stimulus Attribute Constraint](#)
 - [Setting a Stimulus Item Count Constraint](#)
 - [Setting a Multi-Form Overlap Constraint](#)
 - [Setting a Multi-Form Blueprint Coverage Constraint](#)
3. When you've finished setting up your constraint, click **Save**. The **Add/Edit Other Constraint** window closes and the new constraint appears in the table. [Figure 96](#) shows a set of constraints.

Figure 96. Content Form Workspace Page: Other Constraints Panel (Populated)

Name	Min	Max	Current	Enabled
Blueprint Coverage Constraint	100%	100%	100%	<input checked="" type="checkbox"/>
Item DOK = 1	3	3	0	<input checked="" type="checkbox"/>

Showing 1 to 2 of 2 entries

■ Current value too low.
 ■ Current value too high.

You can edit or delete the constraint by selecting the row and clicking **Edit** or **Delete**. You can disable the constraint by clearing the checkbox in the Enabled column.

Repeat these steps as needed.

Setting an Item Attribute Constraint

An Item Attribute Constraint ([Figure 97](#)) limits the number of items on the form that meet certain criteria.

Figure 97. Add/Edit Other Constraint Window: Item Attribute Constraint

Add/Edit Other Constraint

Item Attribute Constraints limit the number of items on the form that meet certain criteria. Specify the min and max number of items that need to have, or not have, specified attribute values (you can select item Attributes, IAT Attributes, Statistical values and CSR Standards).

Constraint Name: Choice Interaction Type and Grade 3

Item Attributes:

- NOT AND OR Add rule Add group
- IAT Interaction Type equal choiceInteraction Delete
- Grade equal 3 Delete

Strict Constraint: Is Strict Constraint

Base: Item Based

Value: Raw Value

Min: 1

Max: 1

Save Cancel

1. Create the constraint logic using the controls in the *Item Attributes* section. For example, you can specify that the constraint applies to items for which IAT Interaction Type equals choiceInteraction AND Grade equals 3. For help creating constraint logic, refer to [Creating Constraint Logic](#).
2. *Optional*: Clear the **Is Strict Constraint** checkbox to indicate that the constraint need not necessarily be met.
3. From the *Base* dropdown list, select a base.
4. As an example, if you select **Point Based** for a constraint on Grade equaling 3, then each item with a Grade of 3 contributes to the constraint based on its maximum number of points, with a 3-point item weighted by three and a 1-point item by one. But if you select **Item Based**, Grade of 3 contributes based on the number of items, with a 3-point and a 1-point item having the same weight.

Other options automatically set the *Value* dropdown list below to **Average**. For example, the **PValue** option constrains the average *p* value to fall within the minimum and maximum values set below.

5. If necessary, from the *Value* dropdown list, select a value. This will determine what the minimum and maximum values mean, below.
6. Set the minimum and maximum value of items/points that must meet the criteria created in the *Item Attributes* section.

For example, if you selected **Item Based** and **Raw Value**, you can specify that only up to three items may meet these criteria, with a minimum of zero (that is, no minimum). Or if you selected **Point Based** and **Percent Value**, you can specify that the criteria must be met for 50–90% of earnable points. Likewise, if you selected **PValue** (and **Average**), you can specify that the average *p* value of the items meeting these criteria must be 1–5.

Setting a Max Consecutive Same-Value Attribute Constraint

A Max Consecutive Same-Value Attribute Constraint ([Figure 98](#)) limits the number of consecutive items on the form that can have the same attribute value. The consecutive items may appear anywhere on the form.

Figure 98. Add/Edit Other Constraint Window: Max Consecutive Same-Value Attribute Constraint

The screenshot shows a window titled "Add/Edit Other Constraint" with a close button (X) in the top right corner. The window contains the following text and controls:

Max Consecutive Item Attribute Constraints limit the number of consecutive items on the form that have the same attribute value.
Specify the attribute, value and max number of consecutive items (you can select item Attributes, IAT Attributes, Statistical values and CSR Standards).

Constraint Name: Max of 3 Consecutive Items with Key A

Item Attributes: A section with a yellow background containing a "NOT" checkbox (unchecked), an "AND" button, and a logic builder. The logic builder shows a double-headed arrow icon, a dropdown menu with "Answer Key" selected, a dropdown menu with "equal" selected, and a dropdown menu with "A" selected.

Max Consecutive Items: 3

Buttons: Save, Cancel

For example, you may want to prevent a form from containing more than three consecutive multiple-choice items that all have the same correct answer. If the items contain up to four options each, you will need to create a constraint for each possible answer key, that is, one with the Answer Key attribute equaling A, one with the same attribute equaling B, one for C, and one for D.

1. Create the constraint logic using the controls in the *Item Attributes* section. In the example described above, you would select **Answer Key**, **equal**, and **A**, and leave the **NOT** checkbox cleared. After saving the constraint, you would proceed to create constraints for the B, C, and D answer keys. For help creating constraint logic, refer to [Creating Constraint Logic](#).
2. Enter a number in the *Max Consecutive Items* field. This is the maximum number of consecutive items on the form that match the constraint logic. For example, you can enter 3 to allow up to three such items in a row.

Setting a Stimulus Attribute Constraint

A Stimulus Attribute Constraint ([Figure 99](#)) limits the number of passages on the form that meet certain criteria.

Follow the instructions in [Setting an Item Attribute Constraint](#). The only difference is that you will not be selecting base or value.

Figure 99. Add/Edit Other Constraint Window: Stimulus Attribute Constraint

Stimulus Attribute Constraints limit the number of stimuli on the form that meet certain criteria. Specify the min and max number of Stimuli that need to have, or not have, specified attribute values.

Constraint Name:

Stimulus Attributes:

NOT AND OR

.....

Strict Constraint: Is Strict Constraint

Min:

Max:

Setting a Stimulus Item Count Constraint

A Stimulus Item Count Constraint ([Figure 100](#)) limits the number of items belonging to any one passage that are aligned to the same standard.

1. From the *Specify Blueprint Level* dropdown list, select the level of the standards in the hierarchy. For example, **1** represents top-level standards.
2. Set a minimum and maximum number of items that can be aligned to the same standard.
3. *Optional:* Create constraint logic to determine which stimuli and items the constraint will apply to. For example, you could apply the constraint only to passages for which Braille equals BRF and only to items that have a minimum score of 0. For help creating constraint logic, refer to [Creating Constraint Logic](#).

Figure 100. Add/Edit Other Constraint Window: Stimulus Item Count Constraint

Setting a Multi-Form Overlap Constraint

A Multi-Form Overlap Constraint ([Figure 101](#)) limits how many items on the form can overlap with the items of other forms.

Figure 101. Add/Edit Other Constraint Window: Multi-Form Overlap Constraint

1. Enter or select the minimum and maximum number of items that can overlap.
2. Click in the *Forms* field and/or *Workspaces* field, then make selections from the dropdown lists that appear. Repeat to add multiple forms and/or workspace blocks. Note that you must add at least one form or workspace block.

Setting a Multi-Form Blueprint Coverage Constraint

A Multi-Form Blueprint Coverage Constraint ([Figure 102](#)) ensures that all standards that are active on the test are accounted for among a set of forms.

Figure 102. Add/Edit Other Constraint Window: Multi-Form Blueprint Coverage Constraint

1. Select a standard level. For example, **1** represents top-level standards.
2. Click in the *Forms* field and/or *Workspaces* field, then make selections from the dropdown lists that appear. Repeat to add multiple forms and/or workspace blocks. Note that you must add at least one form or workspace block.

Creating Constraint Logic

Some other constraints require you to create potentially complex constraint logic. This means creating one or more groups of one or more rules, all under a single top-level group, with each group governed by AND, OR, and/or NOT operators. Each rule consists of a statement about an item or stimulus, for example, that Depth of Knowledge equals 1.

This section describes how to create item attribute constraint logic; the process is very similar when creating logic for stimulus attribute constraints or stimulus item count constraints.

The top-level group is created for you and contains a single blank rule, as in [Figure 103](#). Here, the rule pertains to an item attribute; elsewhere, it may pertain to an attribute of a stimulus.

Figure 103. Add/Edit Other Constraint Window: Item Attribute Constraint: Item Attributes Section

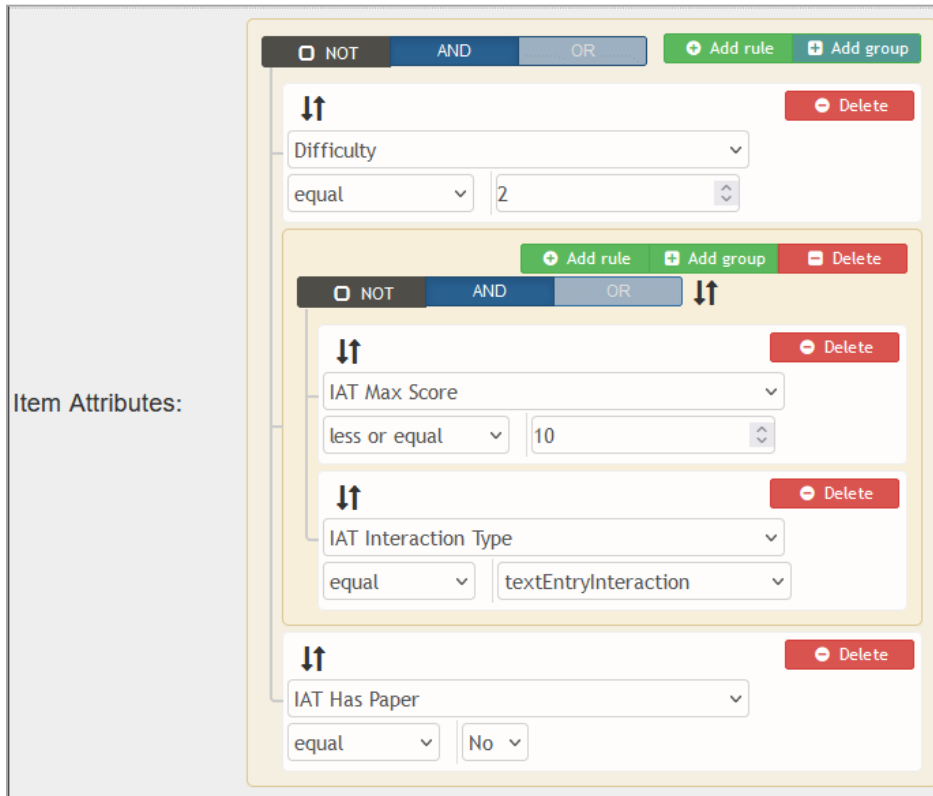
- Set each rule to specify what kinds of entities you want the rule to apply to. For example, from the first (attribute) dropdown list, select **Difficulty**. From the second (operator) dropdown list, select **equal**. From the third (value) dropdown list, select **2**. This rule, shown in [Figure 104](#), applies to items that have a Difficulty of 2.

Figure 104. Add/Edit Other Constraint Window: Item Attribute Constraint: Item Attributes Section

The screenshot shows a window titled 'Item Attributes'. On the left, the text 'Item Attributes:' is visible. The main area contains a rule configuration interface. At the top, there are three buttons: 'NOT' (selected), 'AND', and 'OR'. To the right of these are two green buttons: 'Add rule' and 'Add group'. Below this, a rule is defined. It starts with a handle consisting of two vertical arrows (one pointing up, one pointing down). To the right of the handle is a dropdown menu with 'Difficulty' selected. To the right of the dropdown is a red 'Delete' button. Below the dropdown menu is another dropdown menu with 'equal' selected. To the right of this is a text input field containing the number '2'.

- Different attributes are available for items and stimuli.
 - The operators available vary depending on the attributes. Common operators are **equal**, **not equal**, **more**, **less**, **begins with**, **ends with**, **is empty**, and **is not empty**. Those last two do not take values, so no value field or dropdown list will appear.
- You can select **NOT** for the group in order to ban all entities that match the rules.
 - To add a new rule after the existing ones, click **Add rule**. When you have multiple rules, the top-level group's **AND** and **OR** buttons become active.
 - To set the logic that governs multiple rules in a group, select either **AND** or **OR**.
 - To add a new group of rules below an existing group, click **Add group** to the right of the parent group's header.
 - To move a rule or group to a different location in the hierarchy, click and drag the handle with the up and down arrows **↕**. This handle is located to the left of each rule and to the right of each group's header.

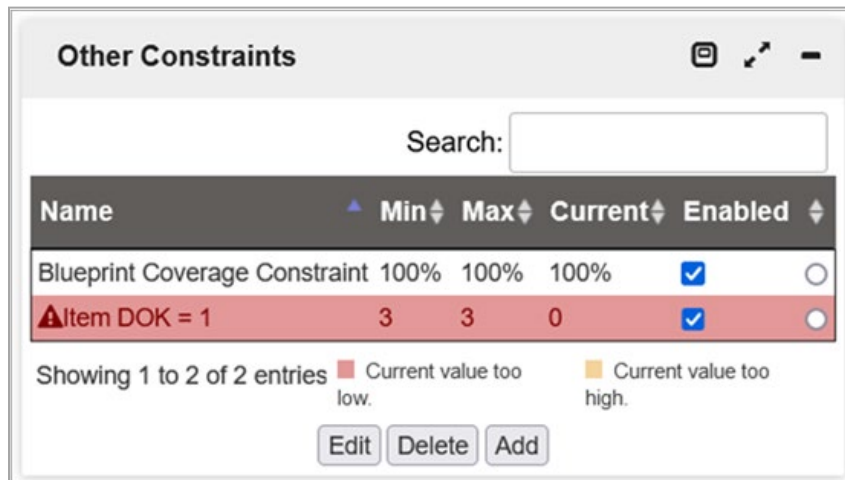
Figure 105. Add/Edit Other Constraint Window: Item Attribute Constraint: Item Attributes Section



- To delete a rule or group, click **Delete** beside it.

Referring to Other Constraints

Figure 106. Content Form Workspace Page: Other Constraints Panel (Populated)




Once items have been added to the currently selected form, you can determine whether other constraints are met.

- As shown in [Figure 106](#), the table displays the minimum, maximum, and current values. For stimulus constraints, green check marks and red Xes in the Current column indicate whether the constraints are met. The table rows are color-coded red or yellow if items on the form produce values too low or too high to meet the constraints. When a constraint cannot be met using any of the items/stimuli in the whole workspace (not just the current form), a red warning icon appears beside the constraint name.
- At the top of the workspace, to the right of the form name, the “Other Constraints” flag is marked with a green check mark or red X to indicate whether or not all the constraints are met.

To search the list of constraints in the table, type in the *Search* field above it. The search applies to all the columns.

Referring to Other Validations

Once items have been added to the currently selected form, you can determine whether other validations are met.

- Click the **Other Validations** panel on the left to view the details. These validations are pass/fail. Hover over the  icon beside a validation to learn more.
- At the top of the workspace, to the right of the form name, the “Other Validations” flag is marked with a green check mark or red X to indicate whether or not all the validations are met.

Creating and Deleting Forms Within a Workspace

You can create new forms within a workspace in two ways, manually and automatically.

Manually Creating Forms

To create a new form manually, click the + button to the right of the currently existing form tabs.

Automatically Generating Forms

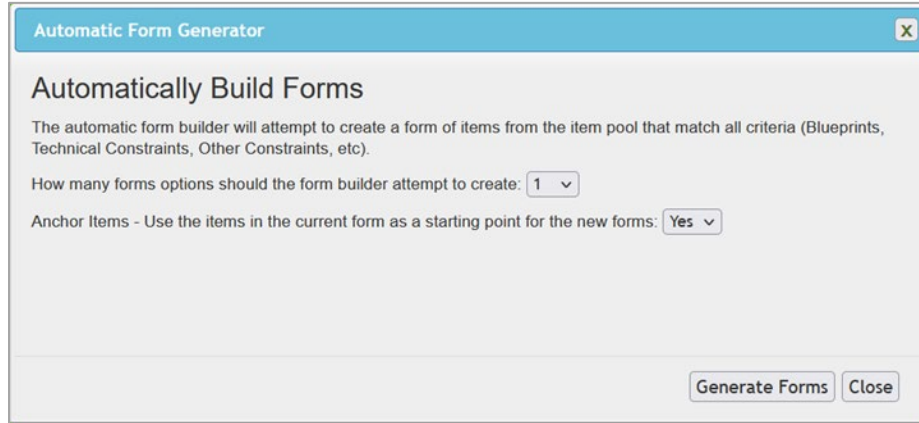
You can use the Automatic Form Generator to create a form or forms based on the item pool. The Automatic Form Generator attempts to create a form that meets all the criteria set in earlier steps.

You can build forms automatically as an alternative to adding items manually or uploading item lists (as described in [Adding and Removing Items](#)), or you can combine different approaches. If you have an existing form in your workspace, you can use its items as anchor items, that is, make them the basis for your new form or forms.

1. In a saved workspace with a pool of items, click **Automatically Build Form** at the upper-right corner. The **Automatic Form Generator** window appears ([Figure 107](#)).

This window sometimes contains an alert (not shown) explaining potential issues with auto-generation, such as items that are missing required values. An alert does not necessarily mean that auto-generation will fail.

Figure 107. Automatic Form Generator Window



2. From the first dropdown list, select the number of forms you want to create. You can create up to 10 at one time. There is no limit on how many forms can exist in a workspace. Note that you will need to remove all but one form before you can advance the status of the workspace.
3. If any items have been added to the current form, then from the second dropdown list, select **Yes** or **No** to determine whether those items will be used as anchor items, that is, as a starting point for the new forms.
4. Click **Generate Forms**.

If the form generation succeeds, click **OK**. The new forms appear. If the form generation takes a long time, you may choose to allow the process to run in the background and receive an email alerting you when it is complete.

If the form generation fails, a notification pop-up appears. Click **OK**. In case of failure, you will need to change the pool of items, the anchor items used, the blueprint, or the constraints.

Once you have automatically built a form, you can [add and remove items](#) or [set blocks](#).

Deleting Forms

To delete a form, click the remove tab button  on the right side of the form tab. In the confirmation pop-up, click **OK**. The workspace must always contain at least one form.

Adding and Removing Items

You can add items to a form from the pool defined in the section [Defining the Pool of Items](#). There are two ways to do this: adding items manually and uploading item lists.

Note that while items disappear from the Pool table when they are added to the currently selected form, they will still appear when another form tab is selected, unless they have been added to that form too.

To add items manually:

Select the tab of the form to which you want to add items. Mark the items' checkboxes in the Pool table and click **Add to Current Form**. The items move from the Pool table to the main table above. Note that marking the checkbox to select all items will only select the ones on the current page of the pool.

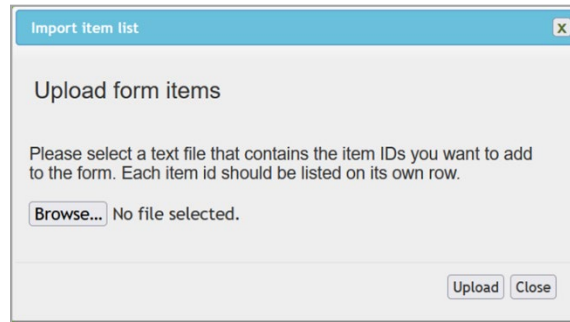
Figure 108. Content Form Workspace Page: Detail of Form Assembly Tab: Current Form 1 Tab with Item Tables (Form and Pool)

The screenshot displays the 'Current Form 1' workspace. At the top, there are tabs for 'Current Form 1' and '+'. Below the tabs are buttons for 'Remove from Current Form', 'Column visibility', 'Excel', 'PDF', 'Web Preview', 'Update FT Stim Group', and 'Search:'. The main table has columns: Position Number, Item ID, Block #, Stimulus, and FT Stim Group. A single row is visible with Position Number 1, Item ID 946, Block # 1, and Stimulus. Below this table, it says 'Showing 1 to 1 of 1 entries'. The 'Pool' section is below, with a 'Show 250 entries' dropdown, 'Standard Show All' dropdown, and buttons for 'Add to Current Form', 'Column visibility', 'Filter', 'Excel', and 'PDF'. The 'Pool' table has columns for Item ID and Stimulus. A single row is visible with Item ID 1292 and Stimulus 260. Below this table, it says 'Showing 1 to 1 of 1 entries'. At the bottom right, there are 'Previous', '1', and 'Next' navigation buttons.


To upload a list of items:

1. Compile a list of item IDs, each in its own row, in a TXT file.
2. Select the tab of the form to which you want to upload items.
3. Click **Upload Item List** at the upper-right corner, and in the **Import item list** window that appears ([Figure 109](#)), click **Browse...** Select the file from your device. (Alternatively, drag and drop the file onto the *No file selected* field.)

Figure 109. Import Item List Window



4. Review the resulting messages and click **Upload**. The items are moved from the Pool table to the form table above.

To reorder the items in the main table, drag and drop them using the reordering arrows  on the left. The position numbers beside the arrows update accordingly. This order determines the order in which items will appear on the test or in blocks. Note that if you have already [set blocks](#), reordering the items may change which blocks they are assigned to.

To remove items from the form, mark the checkboxes in the top table and click **Remove from Current Form**. The items move from the main table back to the Pool table.

To search either table, use the *Search* field at its upper-right corner. This field searches all viewable columns as set in **Viewable Pool Attribute**, including any temporarily hidden by the **Column visibility** feature.

To add or edit comments on items, refer to [Commenting on a Workspace Item](#).

Viewing Multiple Dimensions of an Item

When an item has multiple dimensions, the form and Item Pool tables in the **Form Assembly** tab display only the first dimension. You can use the **Item Pool With Dimension** tab ([Figure 110](#)) to view tables listing a breakdown of dimensions for each individual item, each dimension in its own row.

Figure 110. Content Form Workspace Page: Item Pool With Dimension Tab

Position Number	Item ID	Block #	Stimulus	FT Stim Group	Item Response Type	Stim:Description	Correlation	Difficulty	Dimension	Model	P0	P1	P2	P3	P4	P5	P6	P7	P8	P9	PValue	Socks
1	2558	1	672	A	None	QA stimulus																AIR-ALG1-
2	2327	1	638	A	None	test																AIR-ALG1-
3	2187	1		A	None																	AIR-ALG1-
4	2202	1	626	A	None	QA Test Passage 04/19																AIR-ALG1-
5	2328	1	638	A	None	test																AIR-ALG1-

Item ID	Stimulus	Stim:Description	Correlation	Difficulty	Dimension	Model	P0	P1	P2	P3	P4	P5	P6	P7	P8	P9	PValue	Socks
6383																		AIR-ALG1-v5.ct1AIR-EL
6407																		AIR-ALG1-v5.ct1AIR-EL
6409																		AIR-ALG1-v5.ct1AIR-EL
6410																		AIR-ALG1-v5.ct1AIR-EL
6420																		AIR-ALG1-v5.ct1AIR-EL

The top table lists dimensions of items on the current form and the bottom table lists those of items in the pool. These tables are view-only. They display the same columns as the tables in the **Form Assembly** tab, and you can search them by typing in the *Search* field at the top-right corner of each.

Updating Multiple Choice Item Response Type

On the current form in the **Form Assembly** tab, you can update the item response types for Multiple Choice (MC) items. The item response type determines whether an alternate item's responses are rendered as strips or as 3x3 segments in an Alt Combined 3x3/Strip (PDF) Report generated from the Action Center. For instructions on generating that report, refer to [Print an Alt 3x3 \(MC Items\) \(PDF\) Report](#)

For items with Multiple Choice (MC) interactions containing only image options, you can generate a 3x3 report in PDF format. This report includes items only. For a stimulus report, refer to [Print an Alt Posters \(PDF\) Report](#).

1. From the **Action Center** page ([Figure 201](#)), select a config file and click **Generate Report**. The **Print Report** page appears.
1. From the *Choose the Report You Want to Print* section, select **Alt 3x3 (MC Items)**.
2. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Print an Alt Combined 3x3/Strip (PDF) Report.

- To update a single item's response type, use the dropdown list in the Item Response Type column.
- To update multiple items' response types at once, select the checkboxes to the left of the item IDs and use the *Update item response type* dropdown list.


Setting Field Test Stimulus Groups

You can set field test (FT) stimulus groups for items on a form. Each group is identified by a letter of the alphabet.

- To set a particular item to belong to a group, use the dropdown list in the FT Stim Group column to select a group.
- To set multiple items to belong to the same group, select each one using the checkbox to the left of the item ID. Then select the group from the *Update FT Stim Group* dropdown list above the table.

Setting Blocks

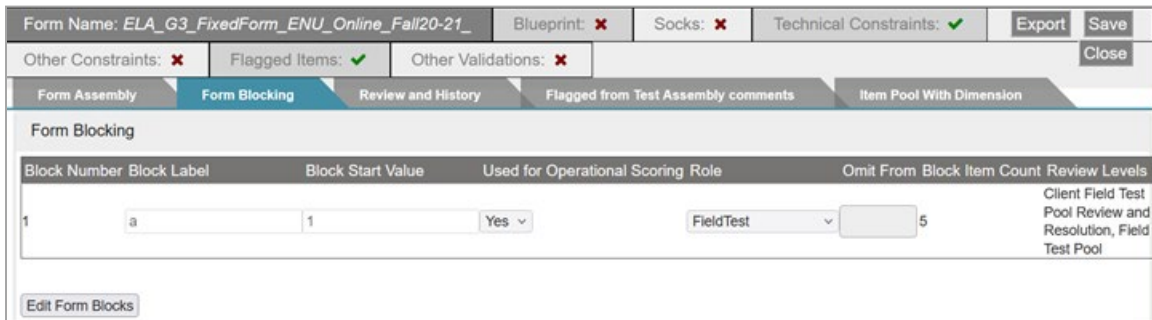
After you've added and ordered the items on a form, you must organize them into blocks. You may want to use blocks to define item roles or sessions.

You can set blocks for the currently selected form, which will typically be the only form in the workspace. When a form cannot be divided into the blocks specified (for example, when it contains too few items), selecting it will cause an error symbol  to display on the **Form Blocking** tab. The blocks will not be editable until the correct form is selected.

You must create the blocks in sequential order.

1. Select the **Form Blocking** tab, shown with two blocks already created in [Figure 111](#).

Figure 111. Content Form Workspace Page: Form Blocking Tab



Block Number	Block Label	Block Start Value	Used for Operational Scoring Role	Omit From Block Item Count	Review Levels
1	a	1	Yes	5	Client Field Test Pool Review and Resolution, Field Test Pool

2. Click **Edit Form Blocks**.
3. Click **Add Block**.
4. Enter a block label that is specific enough to differentiate between blocks. Block labels are used downstream by the Configuration team.
5. If necessary, enter a block start value. When you create your first block, the start value is always 1 and the block contains all the items.

The start value indicates the first of the items that will appear in the block. The number of items appears in the Block Item Count column. When you create subsequent blocks, the previous blocks have their item lists cut off before the subsequent blocks' start values. For example, if your first block initially has six items and you set the second block's start value to 3, the first block will automatically be trimmed down to two items.

The Review Levels column lists the review levels of all the items in the block.






6. From the *Used for Operational Scoring* dropdown list, select **Yes** or **No**.
7. From the *Role* dropdown list, select the block's role, for example, **Operational Test** or **Field Test**.
8. *Optional*: In the Omit From column, click in the field and select options from the dropdown list that appears. Depending on the options you select, the items in the block will not be automatically compared against the blueprint or constraints. You can remove options by deselecting them from the dropdown list.
9. Click **Save**. Note that you will not be able to edit certain fields after saving.
10. *Optional*: Repeat steps [2–9](#) to create more blocks.
11. *Optional*: Click **Edit Form Blocks** to edit your existing blocks as described above.
12. *Optional*: Click **Remove** to remove a block. The first block you created cannot be removed.

In the **Form Assembly** tab, the form's item table includes the Block # column, indicating what block each item belongs to.

Reviewing a Form

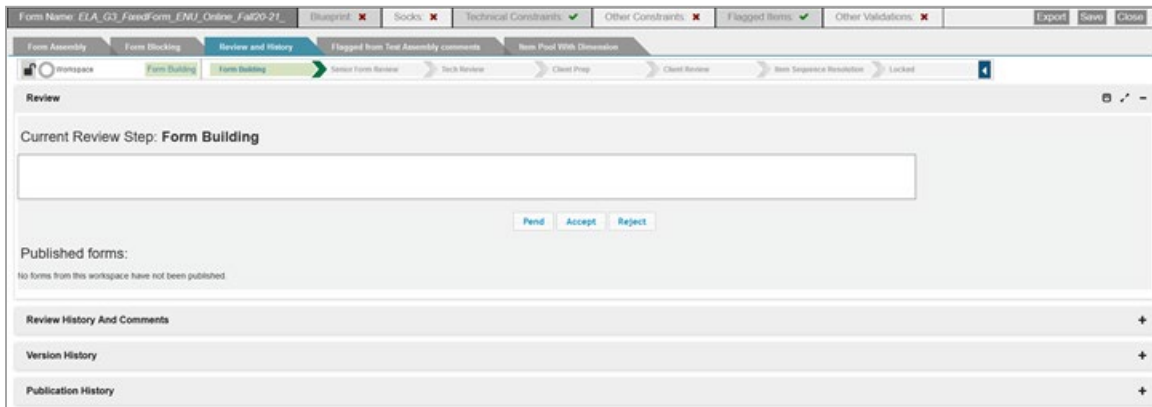
Each form in ITS goes through a predetermined review sequence. The review process can vary from one item bank to another, but always consists of Content team review, Psychometrics team review, and client review. The purpose of the review process is to ensure that the correct process is followed and documented.

Depending on your role and the form's current status, you can review a form and advance it to the next status. To do so, open the form workspace for editing as described in [Viewing and Editing a Form](#). The workspace must contain only one form (you can delete forms by following the instructions in [Deleting Forms](#)). Use the **Form Assembly** and **Form Blocking** tabs to review the form content. Then open the **Review and History** tab ([Figure 112](#)).

This tab contains expandable panels: **Review**, **Review History And Comments**, **Version History**, and **Publication History**. To expand and collapse one of the panels, use the  and  buttons. To change it to fullscreen display and back, use the  and  buttons. To undock and redock it, use the  button.

The history panels show you the form's history. In **Version History**, you can export previous versions of the form workspace to Excel (XLSX) using the **Export** buttons.

Figure 112. Content Form Workspace Page: Review and History Tab



To complete your review after saving any changes, use the **Review** panel. Enter comments in the text field. Describe the changes you made, and include any information that may be relevant or helpful to other reviewers.

- To pend the form's status, click **Pend**; this indicates that the form will stay at the current level of review until the reviewer selects an option to move the item to the next level.
- To accept the form and advance it to the next status, click **Accept**.
- Depending on the item bank, the form's current status, and your role, other buttons may appear; for example, the **Revise and Resubmit** button moves the form back to its original form building status.
- Clicking **Publish Forms** publishes the form from the workspace into **Publications** under the test key selected.

Assembling Tests

The test assembly process entails grouping tests into batches and mapping forms onto the tests. Before you can assemble tests, the tests and segments must be created in FlightPlan, and the forms the tests will use must be built as described in [Managing Forms](#).

To get started assembling tests, hover over the *Form & Test Engineering* menu in the banner and select **Test Assembly**. The **Test Assembly - Main Index** page appears ([Figure 113](#)), divided into multiple sections.

Figure 113. Test Assembly - Main Index Page

Filter Tests							
Client	Season	Year	Subject	Grade	Mode	Custom	
All	All	All	All	All	All		Reset Apply
Ready for Assembly Create A Batch	Name	Subject	Mode	Season	Year	Grade	Actions
	AIR-DEMO-DEMO-AT-ASCO-11-2	ASCO ME	DataEntry	Fall	21-22	2	Initiate Batch
	AIR-DEMO-DEMO-AT-ASCO-22-2	ASCO ME	DataEntry	Fall	21-22	2	Initiate Batch
	AIR-GEN-8M-UD-ELA-WV_DEI-3	ELA	DataEntry	Fall	18-19	3	Initiate Batch
Assignment In Progress Filters Draft Revision	Name	Subject	Mode	Season	Year	Grade	Actions
	AIR-17-18-Spring-Math-9-DataEntry-testing	Math	DataEntry	Spring	17-18	9	View Export
	AIR-21-22-Fall-ASCO ME-4-DataEntry-testRLG2	ASCO ME	DataEntry	Fall	21-22	4	View Export Delete
Mapping In Progress Filters Draft Revision	Name	Subject	Mode	Season	Year	Grade	Actions
AIR-21-22-Fall-ASCO ME-1-DataEntry-testing	ASCO ME	DataEntry	Fall	21-22	1	View Export	
Pending Approval Filters Conf Conf	Name	Subject	Mode	Season	Year	Grade	Actions
AIR-15-16-Spring-Cross Subject-5-Online-testing	Cross Subject	Online	Spring	15-16	5	View Export IDM Signoff Config Signoff	
Published Batches	Name	Subject	Mode	Season	Year	Grade	Actions
AIR-19-20-Spring-Student Help-11-DataEntry-testRLG1	Student Help	DataEntry	Spring	19-20	11	View Export	

- The tests listed in *Ready for Assembly* are the ones created previously in FlightPlan. Only tests that are associated with publications are listed. To update the list of tests from FlightPlan, click **Sync FlightPlan Tests**. When syncing is complete, the message “Syncing: False” appears.
- The sections below, *Assignment In Progress* and *Mapping In Progress*, list the batches that are going through the assembly process, with tags indicating whether they are drafts or revisions (that is, batches that have been sent back from later stages).
- The next section, *Pending Approval*, lists batches awaiting approval by the Item Development Manager (IDM) and/or the Configuration team, with tags indicating which ones.
- The final section, *Published Batches*, lists the batches whose tests have been published.

To find tests or batches in any of the sections, use the filters at the top of the page. You can filter by client, season, school year, subject, grade, and/or mode of testing. (Modes of testing include **DataEntry** for Data Entry Interface (DEI) tests, **ScannedPaper** for paper tests to be

scanned, **ScoringCombo** for combined tests in which segments are configured differently for scoring/reporting and administration, and more.) To search by test or batch name, enter text in the *Custom* search field. Click **Apply**. To show all tests and batches, including those from previous school years, click **Reset**.

Depending on your role, the **View** button beside a batch allows you to view more information.

The **Export** button beside a batch allows you to download an Excel (XLSX) file listing the information in the batch. This may be useful for doing a quality control review on batches that contain many tests and are easier to read in Excel than in the UI.

Expand and collapse sections using the  and  buttons.

This section explains the following tasks, which may be performed in order by various user roles:

- [Creating a Batch of Tests](#)
- [Assigning Form Blocks to Tests in a Batch](#)
- [Mapping Form Blocks to Test Segments in a Batch](#)
- [Reviewing a Batch for Publication](#)
- [Editing a Published Batch](#)

Creating a Batch of Tests

You can create a new batch from the list of tests in the *Ready for Assembly* section ([Figure 114](#)).

Figure 114. Test Assembly - Main Index Page: Ready for Assembly Section



Name	Subject	Mode	Season	Year	Grade	Actions
AIR-DEMO-DEMO-AT-ASCO-11-2	ASCO ME	DataEntry	Fall	21-22	2	Initiate Batch
AIR-DEMO-DEMO-AT-ASCO-22-2	ASCO ME	DataEntry	Fall	21-22	2	Initiate Batch
AIR-GEN-8M-UD-ELA-WV_DEI-3	ELA	DataEntry	Fall	18-19	3	Initiate Batch
AIR-GEN-8M-UD-ELA-WV_DEI-3	ELA	DataEntry	Fall	19-20	3	Initiate Batch

1. Do either of the following:

- To start creating a batch from a specific test in the table, click **Initiate Batch** to the right of that test.
- To start creating a batch without first selecting a specific test, click **Create a Batch** on the left side of the section.

The **Create/Edit a Batch** window appears ([Figure 115](#)).

Figure 115. Create/Edit a Batch Window

2. To change the attributes of your batch, select filters from the *Batch Attributes* section on the left and click **Search**. These are similar to the filters that appear on the **Test Assembly - Main Index** page. Search results appear in the *Choose Tests To Add To Batch* section on the right.
3. From the *Choose Tests To Add To Batch* section, use the checkboxes to select the test or tests you want to include in the new batch.
4. At the bottom-left corner of the window, enter an identifier in the *Custom Identifier* field and click outside the field. This may be useful for distinguishing similar-looking batches. The new batch name appears below in the format “[client]-[school year]-[season]-[subject]-[grade]-[mode]-[custom identifier],” based on your choices.
5. Click **Create/Edit**. The batch is now in the Assignment In Progress status. (If the **Assign Blocks - Batch** window appears ([Figure 117](#)), click **Save** to close it.) Form blocks can now be assigned to tests in the batch as described in [Assigning Form Blocks to Tests in a Batch](#).

You can view the current state of the batch using the **View** button in the *Assignment In Progress* section.

To delete a batch in the Assignment In Progress status, select **Delete** beside it. In the confirmation pop-up, select **OK**. The batch is permanently deleted.

Assigning Form Blocks to Tests in a Batch

You can assign form blocks to tests in a batch in the *Assignment In Progress* section ([Figure 116](#)).

Figure 116. Test Assembly - Main Index Page: Assignment In Progress Section

Name	Subject	Mode	Season	Year	Grade	Actions
AIR-17-18-Spring-Math-9-DataEntry-testing Review	Math	DataEntry	Spring	17-18	9	Assign Export
AIR-21-22-Fall-ASCO ME-2-DataEntry-andf	ASCO ME	DataEntry	Fall	21-22	2	Assign Export Delete
AIR-21-22-Fall-ASCO ME-4-DataEntry-testRLG2 Draft	ASCO ME	DataEntry	Fall	21-22	4	Assign Export Delete
AIR-21-22-Fall-Science-3-Online-testingRLG Draft	Science	Online	Fall	21-22	3	Assign Export Delete

1. Click **Assign** beside a batch. The **Assign Blocks - Batch** window appears ([Figure 117](#)).

Figure 117. Assign Blocks - Batch Window

Assign Blocks - Batch: QualityAssurance1-22-23-Fall-Writing-5-Online-testing
✕

Tests

QA1-DEMO-SUM-GT-WR-5 Assign

Assigned Blocks

Comments

There are no review comments yet.

Add Comment: **Batch in:** **Assignment**

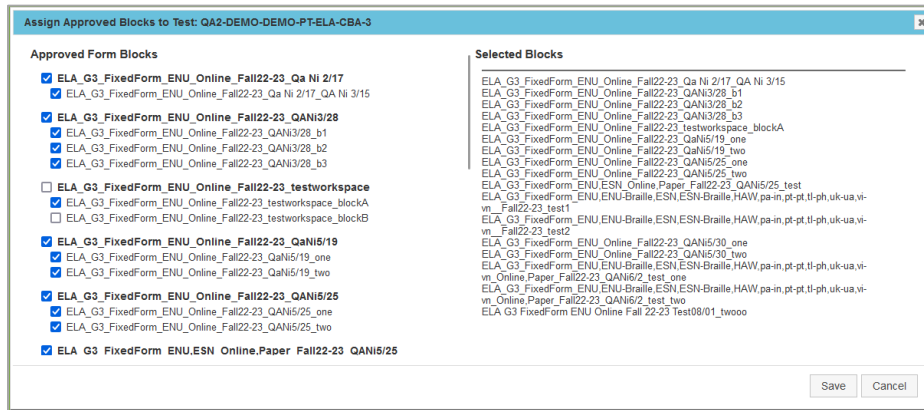
Enter Comments...

Add Comment

Save
Modify Batch
Review Assignments
Cancel

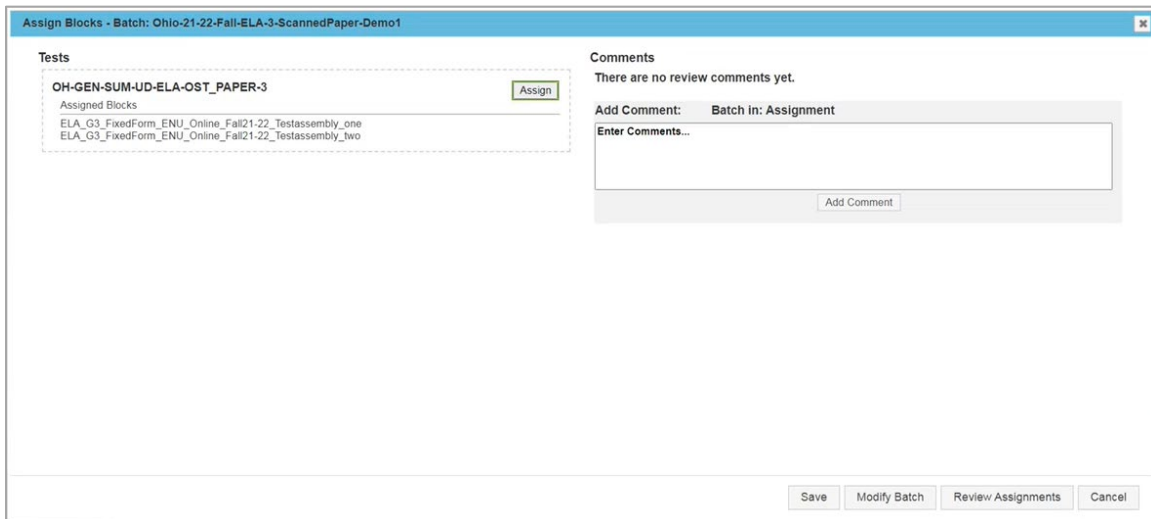
2. *Optional:* If the tests available in the batch are incorrect, then click **Modify Batch** to open the **Create/Edit a Batch** window ([Figure 115](#)). When you're done selecting tests as described in [Creating a Batch of Tests](#), click **Create/Edit** to return to the **Assign Blocks - Batch** window.
3. In the *Tests* section, click **Assign** beside a test. The **Assign Approved Blocks to Test** window appears ([Figure 118](#)). The *Approved Form Blocks* section on the left lists blocks whose attributes match the batch's attributes.

Figure 118. Assign Approved Blocks to Test Window



- In the *Approved Form Blocks* section, use the checkboxes to select blocks, which are then listed in the *Selected Blocks* section.
- Click **Save**. The **Assign Approved Blocks to Test** window closes, returning you to the **Assign Blocks - Batch** window, with blocks populated under the tests listed on the left as in [Figure 119](#).

Figure 119. Assign Blocks - Batch Window



- To assign blocks to more tests or to edit your assignments, repeat steps [3–5](#) as needed.
- Optional*: In the *Comments* section, enter anything you want to document and click **Add Comment**.
- Once the batch has all the tests and forms needed, click **Review Assignments**. The **Review Assign Blocks - Batch** window appears ([Figure 120](#)).

Figure 120. Review Assign Blocks - Batch Window

Review Assign Blocks - Batch: AIR-19-20-Fall-Reading-5-Online-1234

Assignments

Test	Form Name	Type	Block Labels	Block #	Block Role	Item Count
AIR-GEN-PRACT-UD-ELA-5	Reading_G5_FixedForm_ENU_Online_Fall19-20_123456	Operational		1	Operational	10
	Reading_G5_FixedForm_ENU_Online_Fall19-20_forTA	Operational	B1	1	Operational	5
	Reading_G5_FixedForm_ENU_Online_Fall19-20_forTA	Operational	B2	2	Operational	5
AIR-GEN-PRACT-UD-ELA-UT-5	Reading_G5_FixedForm_ENU_Online_Fall19-20_forTA	Operational	B1	1	Operational	5
	Reading_G5_FixedForm_ENU_Online_Fall19-20_forTA	Operational	B2	2	Operational	5

Approval Comment

9. Review the table of block assignments in the *Assignments* section.
10. In the *Approval Comment* section, enter a comment.
11. Click **Approve Assignments**. The **Review Assign Blocks - Batch** window closes and the batch moves into the *Mapping In Progress* section of the **Test Assembly - Main Index** page. The batch is now ready to have form blocks mapped to its test segments, as described in [Mapping Form Blocks to Test Segments in a Batch](#).

You can view the current state of the batch using the **View** button in the *Mapping In Progress* section.

Mapping Form Blocks to Test Segments in a Batch

You can map form blocks to tests in a batch in the *Mapping In Progress* section ([Figure 121](#)).

Figure 121. Test Assembly - Main Index Page: Mapping In Progress Section

Mapping In Progress

Filters:

Name	Subject	Mode	Season	Year	Grade	Actions
QualityAssurance1-22-23-Fall-Math-5-DataEntry-testing	Math	DataEntry	Fall	22-23	5	<input type="button" value="View"/> <input type="button" value="Export"/>

1. Click **View** beside the batch in which you want to map form blocks. The **Map Blocks - Batch** window appears ([Figure 122](#)).

Figure 122. Map Blocks - Batch Window

- In the *Mapping in Progress* section of the new window, click **Map** beside a test in the list. The **Map Test** window appears ([Figure 123](#)) with two sections, *Map Content Form Blocks to Segments* and *Available Form Blocks*. *Map Content Form Blocks to Segments* contains a table listing tests and the segments within each test (the segments being the entities that are listed as tests in the Publication module).

Figure 123. Map Test Window

- In the *Map Content Form Blocks to Segments* section, for each segment, make a selection from the dropdown list under the Form Options column.
 - Selecting the number of forms on the segment opens slots to which you can add forms.
 - The **Empty** option allows you to designate the segment as not having any forms. You may want to do this in a few special cases, for example, when TDS requires a segment before the initial test segment to load data for segment routing or other purposes.

Figure 124. Map Test Window

- The **Merge** option allows you to merge multiple form blocks, or parts of those blocks, into one or more configuration forms. After selecting **Merge**, follow these steps:
 - i. Beside a segment, select **Click to Edit Merge Parameters** (shown in [Figure 124](#)). The **Edit Merged Form** window appears ([Figure 125](#) and [Figure 126](#)).
 - ii. *Optional:* Edit the ID in the *Custom ID* field. This will be the name of the merged config form. You may want to edit the ID to use a client-specified identifier or another human-readable identifier.
 - iii. Make a selection from the *Autogenerate* dropdown list.
 - If you choose to autogenerate, the merge will result in multiple forms. This lets you quickly create form variants that contain some but not all of the same content. The algorithm type is set to fixed and more options appear, as in [Figure 125](#).
 - If you choose not to autogenerate, the merge will result in a single form. Select the algorithm type, either fixed or adaptive, as in [Figure 126](#).

Figure 125. Edit Merged Form Window (Autogenerate Set to Yes)

The screenshot shows the 'Edit Merged Form' window with the following settings and data:

Merge Attributes:

- Custom ID: CH-GEN-SUM-EOC-MA-LOST_PAPER
- Autogenerate: Yes
- Algorithm Type: Fixed
- Num Slots: 5
- Num Items: 19
- Total Forms: 3

Merged Form Slots:

Slot Position	Form Block	Slot Type	Filter Count	Items Per Slot	Actual Form Pos.
1	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP1	Base	1	5	1-5
2	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT1	Filter	3	3	6-8
3	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP2	Base	1	5	9-13
4	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT2	Filter	1	1	14
5	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP3	Base	1	5	15-19

Available Form Blocks:

Block Name	Type	Language	Block Number	Block Role	Block Item Count
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP1	FixedForm	ENU	1	Operational	5
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP2	FixedForm	ENU	2	Operational	5
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP3	FixedForm	ENU	3	Operational	5
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT1	FixedForm	ENU	4	Operational	9
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT2	FixedForm	ENU	5	Operational	3

Figure 126. Edit Merged Form Window (Autogenerate Set to No)

The screenshot shows the 'Edit Merged Form' window with the following settings and data:

Merge Attributes:

- Custom ID: CH-GEN-SUM-EOC-MA-COY_BAZ_PAP
- Autogenerate: No
- Algorithm Type: Fixed
- Num Slots: 3

Merged Form Slots:

Slot Position	Form Block
1	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP1
2	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT1
3	Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT2

Available Form Blocks:

Block Name	Type	Language	Block Number	Block Role	Block Item Count
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_OP1	FixedForm	ENU	1	Operational	5
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT1	FixedForm	ENU	4	Operational	9
Math_G11_FixedForm_ENU_Paper_Fa621-22_Merge_FT2	FixedForm	ENU	5	Operational	3

- iv. Make a selection from the *Num Slots* dropdown list. The selected number of form block slots appear in the *Merged Form Slots* section.
- v. If you set the form to autogenerate in step [iii](#), make selections from the following dropdown lists:
 - *Num Items*: The total number of items that should exist in each resulting autogenerated form.
 - *Total Forms*: The final number of forms you want to result from the merge.
- vi. Do either of the following:
 - From the *Available Form Blocks* section, drag and drop a form block into the slot in *Merged Form Slots* to which you want to assign it, and repeat as necessary.

If you set the form to autogenerate, you can assign the same block more than once only after marking the **Allow a form to be used in multiple filler slots?** checkbox.

- To move the blocks faster, click **Auto Fill Slots** to place all the available form blocks that will fit into the *Merged Form Slots* section. The blocks automatically sort from smallest to largest, based on how many items they contain.
- vii. You can remove a block by dragging it back to the *Available* section. To reorder form blocks within a segment, drag and drop them.

Figure 127. Map Test Window (with Merged Forms)

The screenshot shows the 'Map Test' window for 'QA1-DEMO-DEMO-CT-MA-A-5'. It features a table for 'Merged Form Slots' and a section for 'Available Form Blocks'.

Segment	Form Options	Config Form Name	Content Form Name	Block Label	Type	Language	Block Role	Cohort	Remove	
QA1-DEMO-DEMO-CT-MA-A-5	Merge ▾	Click to Edit Merge Parameters								
		Config Form Name	Autogenerate	Algorithm Type	Total Forms	Total Items				
		QA1-DEMO-DEMO-CT-MA-A-5	true	Fixed	1	1				
		# Workspace Form Block	Slot Type	Filler Count	Items Per Slot	Actual Form Pos				
		2 Math_G5_FixedForm_ENU_Online_Fall22-23_QA Test_FixedForm_One	Base	1	1	1-1				
		3 Math_G5_FixedForm_ENU_Online_Fall22-23_QA Test_FixedForm_Three	Filler	1	1	2-2				
		Click to Edit Merge Parameters								
		Config Form Name	Autogenerate	Algorithm Type	Total Forms	Total Items				
		QA1-DEMO-DEMO-CT-MA-A-5	false	Fixed	1	1				
		# Workspace Form Block								
1 Math_G5_FixedForm_ENU_Online_Fall22-23_QA Test_FixedForm_One										
2 Math_G5_FixedForm_ENU_Online_Fall22-23_QA Test_FixedForm_Two										
Add Another Merged Form										
Available Form Blocks										
<input type="checkbox"/> Allow a form to be used on multiple segments?										
Content Form Name		Type	Language	Block Number	Block Label	Block Role	Block Item Count			
Math_G5_FixedForm_ENU_Online_Fall22-23_QA Test_FixedForm		FixedForm	ENU	1	One	Operational	1			
Math_G5_FixedForm_ENU_Online_Fall22-23_QA Test_FixedForm		FixedForm	ENU	2	Two	Operational	2			
Save Cancel										

- viii. If you set the form to autogenerate in step [iii](#), more columns appear in the *Merged Form Slots* section.
- In the *Slot Type* column, select either **Base** or **Filler**.
 - If you selected **Filler**, then in the *Filler Count* column, select the number of items that will be used in this filler slot for each generated form.
- ix. Click **Save**. The *Edit Merged Form* window closes and the *Map Test* window displays the results of the merge in the *Map Content to Segments* section. You can edit the merged form by selecting **Click to Edit Merge Parameters** again and repeating the steps above.

4. *Optional:* In the **Map Test** window, if you need to use a form on more than one segment, mark the **Allow a form to be used on multiple segments?** checkbox on the right side of the *Available Form Blocks* section. You cannot assign a form more than once on a test without marking this checkbox.
5. If you are not selecting **Merge** for all segments, do the following for any segment that has a number of form blocks set for it:
 - a. From the *Available Form Blocks* section in the **Map Test** window, drag and drop a form block into the segment slot to which you want to assign it, and repeat as necessary.
 - b. *Optional:* To remove a form block from a segment slot, click **Remove** beside it. The form block returns to the *Available Form Blocks* section.
 - c. *Optional:* To reorder form blocks within a segment, drag and drop them. This has no effect on the published test, but you may find it useful for organization.
 - d. *Optional:* To edit a config form name, click **Edit** beside it. Edit the text and click **OK**. This is the name the form will have when it's published to a configuration file.
6. *Optional:* In the Language column, clear the checkboxes for any languages you do not want included.
7. *Optional:* In the Cohort column, select a cohort for each form block that should be associated with one.
 - To add a new cohort, select **Add New** from the dropdown list and enter a name for the new cohort in the window that appears. Click **OK**.
8. *Optional:* To flag a form in the **Map Test** window due to an issue, hover over the content form name and click the **Flag** button that appears. In the pop-up, enter a comment explaining the issue and click **Save**. Flagging sends the form back to the Form Building status, where the issue may be addressed. The comment persists until a user opens and saves the form again.
9. Click **Save**. The **Review Batch** window appears ([Figure 128](#)), listing the segments and their mappings in a table on the left.


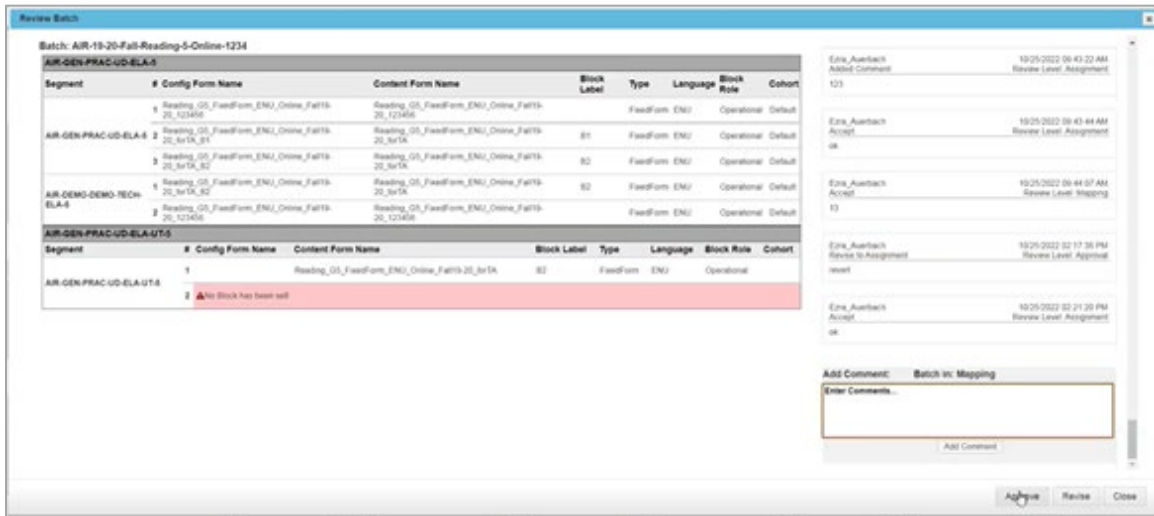
Any segment slot that lacks mappings and has not been marked empty displays a red warning icon .

Figure 128. Review Batch Window



10. *Optional*: Enter a comment in the field on the right and click **Add Comment**. (You will also have to add a comment when you approve.)

11. To advance the batch to the next stage, click **Approve** and enter a comment in the pop-up, then click **OK**. The batch appears in the *Pending Approval* section and is ready for review by the IDM and the Configuration team, as described in [Reviewing a Batch for Publication](#).

Clicking **Revise** instead of **Approve** sends the batch back to the *Assignment In Progress* section.

You can view the current state of the batch using the **View** button in the *Pending Approval* section.

Reviewing a Batch for Publication

Each batch in the *Pending Approval* section ([Figure 129](#)) must be approved by both the Item Development Manager (IDM) and the Configuration team, in any order, before it will be published. The IDM is the Content team lead who manages all Content activity on the project.

Figure 129. Test Assembly - Main Index Page: Pending Approval Section



You can filter to show only the batches that are ready for your review by using the **IDM** and **Config** filter buttons on the left side of the section.

To review a batch, click the appropriate **Signoff** button beside it. In the **Approve Batch** window, which looks similar to the **Review Batch** window ([Figure 128](#)), review the details of the segments and form blocks in the batch.

- To request further revisions, click **Revise to Mapping** (returns the batch to the Mapping In Progress stage) or **Revise to Assignment** (returns it to the Assignment In Progress stage). Enter a comment in the pop-up and click **OK**.
- To approve, click **Approve**. Enter a comment in the pop-up and click **OK**.

Once both teams have signed off, the batch moves to the Published stage and appears in the *Published Batches* section. In the Publication module, all the forms in the batch will appear in the tests to which they're mapped.

To learn how to make further edits to a Published batch, refer to [Editing a Published Batch](#). You will not be able to delete a batch after it has been published.

You can view the current state of the batch using the **View** button in the *Published Batches* section.

Editing a Published Batch

There are three ways to edit a batch in the *Published Batches* section ([Figure 130](#)). You can change the configuration form names only; you can republish the batch, thus incorporating any changes made in form workspaces; or you can return the batch to an unpublished stage. You cannot delete a batch once it has been published, even if it has been returned to the Assignment In Progress stage.

Figure 130. Test Assembly - Main Index Page: Published Batches Section

Name	Subject	Mode	Season	Year	Grade	Actions
AIRL-19-20-Spring-Student Help-11-DataEntry-testRLG1	Student Help	DataEntry	Spring	19-20	11	View Export

Click **View** beside the batch. The **View Batch** window appears ([Figure 131](#)).

Figure 131. View Batch Window for Published Batch

Segment	#	Config Form Name	Content Form Name	Block Number	Block Label	Type	Language	Block Role	Cohort	
		renamemultilanguage1	false	Fixed		1	<input type="checkbox"/> ENJ <input type="checkbox"/> ESN <input type="checkbox"/> HWI <input type="checkbox"/> WAI <input type="checkbox"/> UK-CA <input type="checkbox"/> PA-RI	Default		
	# Workspace Form Block									
	1	ELA-03 FixedForm ENJ Online Summer 22-23 SRTest_E3							3	
	2	ELA-03 FixedForm ENJ E3N HWI WAI UK-CA PA-RI Online Summer 22-23 SR Testspace-08762024_A2							2	
	3	ELA-03 FixedForm ENJ Online Summer 22-23 SRTest_E1							1	
		renamemultilanguage2	false	Fixed		1	<input type="checkbox"/> ENJ <input type="checkbox"/> ESN <input type="checkbox"/> HWI <input type="checkbox"/> WAI <input type="checkbox"/> UK-CA <input type="checkbox"/> PA-RI	Default		
	# Workspace Form Block									
	1	ELA-03 FixedForm ENJ Online Summer 22-23 SRTest_E2							2	

Comments:

- Stephan_Richardson Accept 08/26/2024 02:30:40 PM Review Level: Assignment
- Stephan_Richardson Accept 08/26/2024 02:30:58 PM Review Level: Mapping
- Stephan_Richardson QA Signoff 08/26/2024 02:31:05 PM Review Level: Approval
- Stephan_Richardson Config Signoff 08/26/2024 02:31:12 PM Review Level: Approval
- Stephan_Richardson Revise to Mapping 08/26/2024 05:17:56 PM Review Level: Published
- Stephan_Richardson Accept 08/29/2024 05:18:18 PM Review Level: Mapping

Buttons: Save Renamed Forms, Republish Forms, Revise to Mapping, Revise to Assignment, Close

Do any of the following:

- To change configuration form names, click **Edit** beside any name. Edit the text and click **OK**. You cannot create duplicate config form names within a bank. After making all your edits, click **Save Renamed Forms** to save the names without republishing.
- To recreate the forms altogether and incorporate any changes made in form workspaces, click **Republish Forms**.
- Click **Revise to Mapping** (returns the batch to the Mapping In Progress stage) or **Revise to Assignment** (returns it to the Assignment In Progress stage). Enter a comment in the pop-up explaining why you're requesting revisions, then click **OK**. The batch is returned to a prior stage, where it can be edited but not deleted.
 - If a batch has been published and revised to an earlier stage, but not resaved, you may open it for editing and use the **Revert to Published** button to return it to a published status without having to go through the approval process and republish.

Managing Scoring Specifications

Scoring specifications dictate tests' lowest and highest obtainable scale scores (LOSS and HOSS) and the cut scores that define performance levels within those ranges. Most scoring specification tasks are performed by the Psychometrics (Tech) team; the Content team labels the proficiency levels.







After a scoring specification has been created, you will be able to use it on a blueprint, as described in [Managing Blueprints](#).

Using the Scoring Specifications Library Page


To start managing scoring specifications, hover over the *Form & Test Engineering* menu in the banner and select **Scoring Specifications**. The **Scoring Specifications Library** page appears ([Figure 132](#)), listing all the scoring specifications in the item bank.

Figure 132. Scoring Specifications Library Page

Key	Name	Client	Subject	Creation Date	Last Modified	Last Modified By	Review Status
Grade 1							
22561232			Algebra I	12/1/25 9:45:58 AM	12/1/25 2:17:55 PM		Locked
22555552			Algebra II	11/19/25 11:09:31 AM	11/24/25 2:47:12 PM		Locked
Grade 2.KG							
22555541			Algebra I	11/19/25 10:48:21 AM	11/24/25 11:25:42 AM		Proficiency Labels

- The scoring specifications in the table are always grouped by grade. You can sort within grades by selecting various columns.
- To search the table, use the text box at the top.
- To refresh the information in the table, select  at the top.
- To export scoring specifications, select  in a row, or select the checkboxes and use the **Export** button at the top of the table. An Excel (XLSX) file downloads. You may want to do this in order to share the specifications for review.
- To export the currently displayed contents of the table, select **Export Table**. A comma-separated values (CSV) file downloads.
- You can open an existing scoring specification by selecting  or  in its row. The **Scoring Specification Details** window appears. Depending on the status of the specification, you may be able to edit. Select **Save** to save your edits and close the window.
- To archive or un-archive a scoring specification, click the  or  button in its row, then confirm your action in the pop-up that appears. To archive or un-archive multiple specifications, select the checkboxes and use the buttons at the top of the table. You may want to archive specifications that are no longer needed.

Archived specifications are hidden by default, and you can show them by selecting the **Show Archived** checkbox.

- When a scoring specification is archived, you cannot select it on a blueprint. However, if you build a configuration file that references an archived scoring specification, it will be used.
- To delete a scoring specification, select  in its row. To delete multiple specifications, select them using the checkboxes and select **Delete** at the top. In the confirmation pop-up, select **Delete**.

Creating a Scoring Specification

Select **New** above the table. The **Scoring Specification Details** window appears ([Figure 133](#)), containing a single **Attributes Editor** tab. Select and enter attribute values, then select **Save**.

Figure 133. Scoring Specification Details Window for an Unsaved Specification

Scoring Specification Details
✕

Attributes Editor

Name *

Subject *

Custom Identifier

Intercept

LOSS *

Client *

Grade *

Slope

Cut Ability

HOSS *

Cut Scores: *

Cut	Cut Score
2	100
3	200
4	300
5	400 <small>Cut Score must be smaller than HOSS</small>

+ Add New Cut
🗑 Delete Last Cut

✕ Cancel
✓ Save

- The read-only *Name* text box populates when you select the client, subject, and grade(s).
 - Any text you enter in the optional *Custom Identifier* text box is appended to the specification set's name.
- You can optionally enter a slope, intercept, and/or cut ability. These terms determine the scale score, as calculated by the following equation:

$$\text{scale score} = \text{intercept} + \text{slope} \times \theta$$

They also help determine the θ cut, as calculated by the following equation:

$$\theta \text{ cut} = (\text{cut score} - \text{intercept}) / \text{slope}$$

- *Slope*: The linear scaling coefficient used to convert a student's estimated item response theory (IRT) ability (theta, θ) into the test's reported scale score. Slope determines how quickly the scale score increases as theta increases. Higher slopes spread students out more on the scale-score range; lower slopes compress the scale.

- *Intercept*: The constant term in the scaling equation that maps theta (θ) to the scale-score scale. Intercept sets the baseline or starting point of the scaled score. Together with the slope, it defines how the θ scale (usually centered around 0) maps to the score scale used by the state.
 - *Cut Ability*: The ability level (theta, θ) at which the proficiency cut occurs. It represents the point on the IRT latent ability scale where the test transitions from “below proficient” to “proficient” (or whatever level cut is designated by the state). Historically, the cut ability serves as the reference theta value used by the adaptive algorithm to set adaptive cuts for each strand. Adaptive cuts guide item selection in the adaptive algorithm.
- In the *LOSS* and *HOSS* text boxes, enter the lowest and highest obtainable scale scores.
 - In the *Cut Scores* table at the bottom, enter the cut scores that define performance levels. The list starts with the second cut.
 - Each cut score is the minimum score that falls within the cut, and must be higher than the previous.
 - No cut score can be higher than the HOSS or lower than the LOSS.
 - You can add any number of cuts at the bottom of the table using the **Add New Cut** button.
 - You can delete the last cut listed using the **Delete Last Cut** button. Each set of scoring specifications must contain at least two cuts in order to define a minimum of three performance levels.

Figure 134. Scoring Specification Details Window for a Saved Specification: Attributes Editor Tab

Scoring Specification Details
✕

Attributes Editor
Proficiency Labels
Review and History

Name *

Subject *

Custom Identifier

Intercept

LOSS *

Client *

Grade *

Slope

Cut Ability

HOSS *

Cut Scores: *

Cut	Cut Score
2	<input type="text" value="100"/>
3	<input type="text" value="200"/>
4	<input type="text" value="300"/>
5	<input type="text" value="400"/>

+ Add New Cut
🗑 Delete Last Cut

✕ Cancel
✓ Save

Labeling Proficiency Levels

Once a set of scoring specifications is initially saved, it enters the Draft status and allows Content team users to enter proficiency level labels.


To enter proficiency level labels for a set of specifications, select  in its row, then select the **Proficiency Labels** tab ([Figure 135](#)). The list of levels appears, based on the cut scores entered previously in the **Attributes Editor** tab. Enter a label in each text box. Select **Save**.

Figure 135. Scoring Specification Details Window: Proficiency Labels Tab

Scoring Specification Details ×

Attributes Editor **Proficiency Labels** Review and History

Edit the proficiency level labels below. The cut numbers are determined by the scoring specification's cut scores.

Level #	Label
1	Level 1
2	Level 2
3	Level 3
4	Level 4
5	Level 5

× Cancel ✓ Save

Reviewing a Scoring Specification

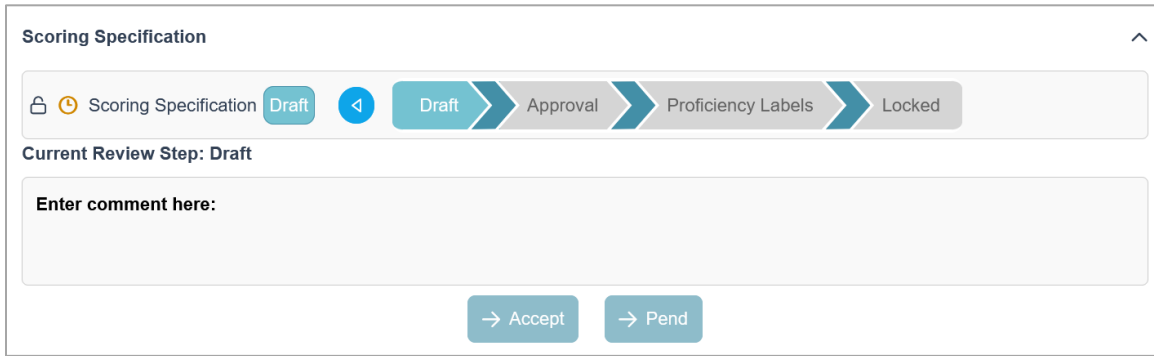
When a scoring specification is initially saved, it enters the Draft status. It must subsequently progress through further statuses:

- **Approval**
- **Proficiency Labels**
- **Locked:** The scoring specification cannot be edited in this status.

Depending on your role and the specification's current status, you can accept (move the scoring specification to the next status), pend (keep it at the current status), or revise (move it to the previous status).

Review is performed in the **Scoring Specification Details** window. Once you have reviewed the specification details, select the **Review and History** tab and enter a comment in the text box ([Figure 136](#)). Then select one of the buttons, as available, to accept, pend, or revise.

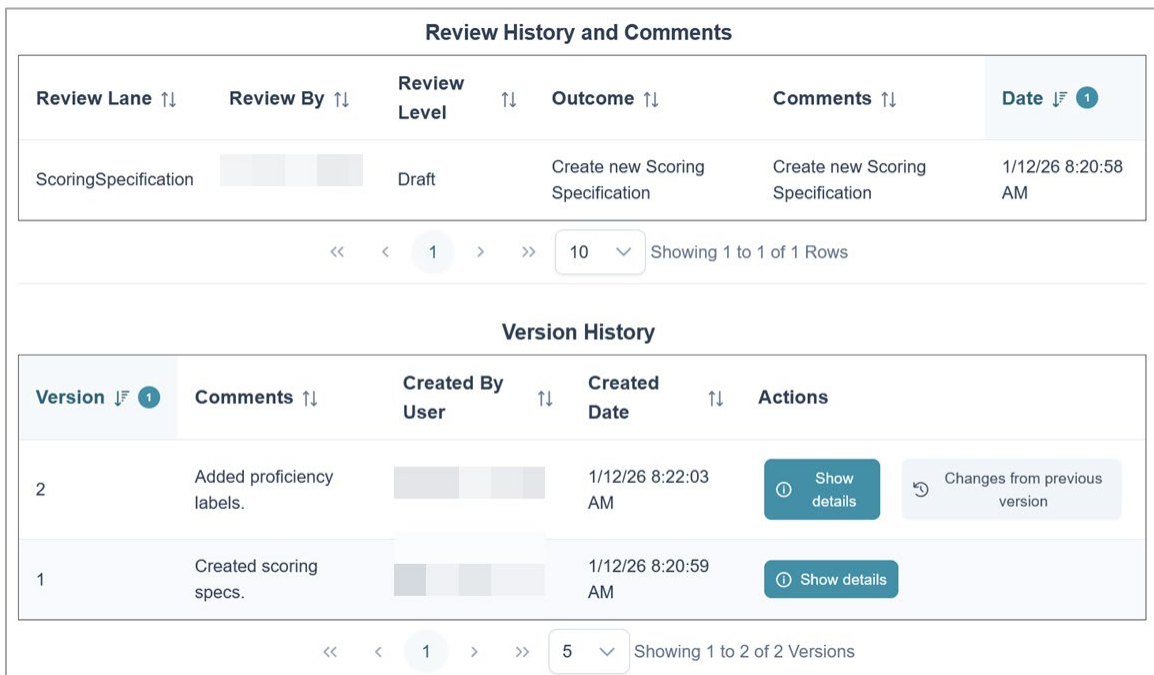
Figure 136. Detail of Scoring Specification Details Window: Review and History Tab Displaying Review Controls



Below the review controls in the **Review and History** tab are two tables ([Figure 137](#)):

- The *Review History and Comments* table records each status change. You can sort this table by selecting any column header.
- The *Version History* table records each saved version with the comments entered at save time. To access all the details about a version, select **Show details**. To access a list of changes from the previous version, select **Changes from previous version**. You can sort this table by selecting certain column headers.

Figure 137. Detail of Scoring Specification Details Window: Review and History Tab Displaying Two Tables



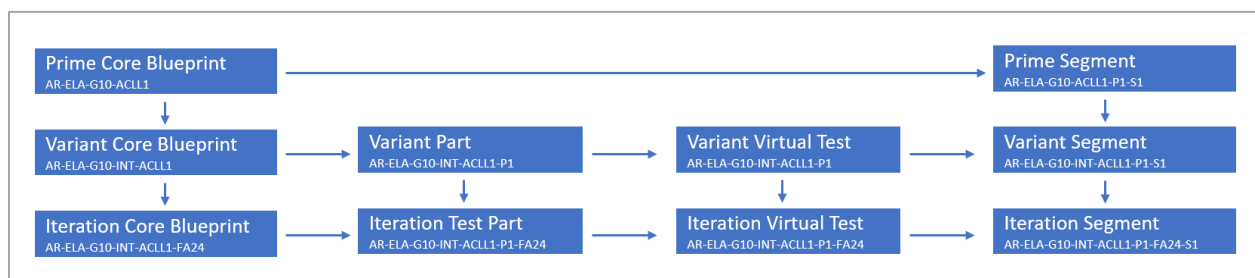
Managing Blueprints

Blueprints allow you to design tests and plan test administration. Most blueprint tasks are performed by the Content team, with some being performed by the Psychometrics (Tech) team.

The blueprint hierarchy is described below and diagrammed in [Figure 138](#).

- A prime blueprint is an overarching test design that we agree to implement for the client. Sometimes the test design dictates multiple segments, and sometimes it doesn't specify whether multiple segments are necessary.
- A variant is a different way to implement a test based on the prime blueprint. We will generally have multiple variants when we need to structure the implementation differently for different administrations. A variant may contain the following:
 - Variant parts if the test is administered in separate parts, such as on different days
 - Variant virtual tests if the test is constructed from one or more segmented tests
 - Variant segments
- Each time we administer a test is an iteration of a blueprint. This is a seasonal or yearly implementation of the test for which we can send a configuration file to the Test Delivery System (TDS). An iteration core blueprint may contain the following:
 - Iteration parts
 - Iteration virtual tests
 - Iteration segments

Figure 138. Hierarchy of Blueprint Relationships








Using the Blueprint Page

To start managing blueprints, hover over the *Form & Test Engineering* menu in the banner and select **Blueprint**. The **Blueprint** page appears ([Figure 139](#)), displaying a table of existing prime core blueprints.

Figure 139. Blueprint Page

Key	Name	Client	Subject	Creation Date	Last Modified	Last Modified By	Review Status
Grade 1							
<input type="checkbox"/>	22561216		ELA	11/24/25 3:24:06 PM	12/2/25 9:52:36 AM		Blueprint Design
<input type="checkbox"/>	22555507		Algebra I	11/18/25 11:16:26 AM	11/24/25 3:15:40 PM		Blueprint Design

- The blueprints in the table are always grouped by grade. You can sort within grades by selecting various columns.
- To search the table, use the text box at the top.
- To refresh the information in the table, select  at the top.
- You can open an existing blueprint by selecting  or  in its row. Depending on your user role and the status of the blueprint, you may be able to edit. To return to the **Blueprint** page, use the breadcrumbs at the top left.
- To archive or un-archive a blueprint, click the  or  button in its row and confirm your action in the pop-up that appears. To archive or un-archive multiple blueprints, select the checkboxes and use the buttons at the top of the table, then confirm. You may want to archive blueprints that are no longer needed.

Archived blueprints are hidden by default, and you can show them by selecting the **Show Archived** checkbox.

Creating a Prime Core Blueprint

1. On the **Blueprint** page, select **New**. A new prime core blueprint page appears, open to the **Attributes** tab > **Basic Attributes** sub-tab ([Figure 140](#)).

Figure 140. New (Unsaved) Prime Core Blueprint Page: Attributes Tab: Basic Attributes Sub-Tab

2. Fill out any required sub-tabs of the **Attributes** tab as described in [Blueprint Attributes](#). Select **Save**, enter a comment in the pop-up, and select **Save** again. Once you've saved, new tabs appear.

Each save creates a version of the blueprint. You can access information on previous versions in the **Review and History** tab, as described in [Reviewing a Blueprint](#).

3. *Optional:* To create segmented tests, fill out the **Segments** tab and edit each segment as needed, as described in [Blueprint Segments](#).
4. Modify the sub-tabs of the **Constraints** tab as described in [Blueprint Constraints](#). Select **Save**, enter a comment in the pop-up, and select **Save** again.
5. *Optional:* To attach supporting documentation, such as test design documents from the client, use the **Documents Library** tab as described in [Blueprint Documents](#).

Each blueprint enters the Blueprint Design status when saved. It must be reviewed and approved for its status to progress, as described in [Reviewing a Blueprint](#).

To return to the **Blueprint** page, use the breadcrumbs at the top left.

Blueprint Attributes

The **Attributes** tab contains sub-tabs:

- [Basic Attributes](#)
- [Field Test Parameters](#)
- [Scoring Attributes](#)

Basic Attributes

The **Basic Attributes** sub-tab ([Figure 140](#)) allows you to set basic information about the blueprint.

- The read-only *Name* text box populates when you select the client, subject, grade(s), and target population.
 - Any text you enter in the optional *Custom Identifier* text box is appended to the blueprint's name.
- In the *Min Items* and *Max Items* text boxes, enter the minimum and maximum numbers of items that any test created from this blueprint can contain.
- If the tests created from this blueprint will be fixed form, you can optionally make a selection from the *Points Determine Form Length* dropdown list.
 - **Yes:** Selecting this option adds two new text boxes for you to fill out, *Min Points* and *Max Points*, and the length of each test will be determined by those parameters.
 - **No:** Selecting this option means the length of each test will be determined by the *Min Items* and *Max Items* numbers specified above.
- You can optionally make a selection from the *CSR Publication* dropdown list after selecting a subject. The blueprint's Content Standards Repository (CSR) publication determines the standards and sometimes other elements to be assessed. Once **Basic Attributes** is saved, the standards will appear in the **Constraints** tab within the **Standards and Blueprint Elements** sub-tabs.

A CSR publication is required to create tests but is not required at the prime core blueprint level.

Field Test Parameters

In the **Field Test Parameters** sub-tab ([Figure 141](#)), you can optionally determine how field test (FT) items may appear in each test created from the blueprint. If you leave this sub-tab blank at the prime level, you will still be able to populate it at the variant or iteration level. This information is required for field test items to appear on a test.

- In the *FT Min Items* and *FT Max Items* text boxes, set the minimum and maximum numbers of field test items that may appear on each test.
- In the *FT Start Pos* and *FT End Pos* text boxes, set the first and last position numbers at which the field test items may appear on each test.
- In the *FT Min LOE* and *FT Max LOE* text boxes, set the range of level of effort (LOE) that field test items may require of students.

Figure 141. New (Unsaved) Prime Core Blueprint Page: Attributes Tab: Field Test Parameters Sub-Tab

The screenshot shows the 'Attributes' section of a Prime Core Blueprint page. The 'Field Test Parameters' sub-tab is selected. The page includes a breadcrumb trail: 'Blueprint Home' > 'Prime Core Blueprint New (Not saved)'. A green 'Save' button is located in the top right corner. Below the breadcrumb trail, the 'Attributes' section is displayed with three sub-tabs: 'Basic Attributes', 'Field Test Parameters' (selected), and 'Scoring Attributes'. The 'Field Test Parameters' sub-tab contains six input fields arranged in a 3x2 grid:

FT Min Items	<input type="text"/>	FT Max Items	<input type="text"/>
FT Start Pos	<input type="text"/>	FT End Pos	<input type="text"/>
FT Min LOE	<input type="text"/>	FT Max LOE	<input type="text"/>

Scoring Attributes

In the **Scoring Attributes** sub-tab ([Figure 142](#)), select a scoring specification and a stat domain. These selections are both optional at the prime level; however, the Form Builder can only use a blueprint that has selections.

Figure 142. New (Unsaved) Prime Core Blueprint Page: Attributes Tab: Scoring Attributes Sub-Tab

The screenshot shows the 'Scoring Attributes' sub-tab selected in the 'Attributes' section. The breadcrumb trail remains the same. The 'Scoring Attributes' sub-tab contains two dropdown menus:

Scoring Specification: 22786781 (QualityAssurance1 2 ELA Demo) × ▾

Stat Domain: ELA 3 × ▾

The stat domain determines which statistics are used for items. An item may have statistics for multiple stat domains uploaded from the Stats Workspace.

For information on creating and editing scoring specifications, refer to [Managing Scoring Specifications](#).

Blueprint Segments

In the **Segments** tab ([Figure 143](#) and [Figure 144](#)), optionally select the number of prime segments you want to create from the dropdown list, then select **Set**. An initial list of segments appears in a table.

You can use the **Add Segment** and/or **Delete** buttons to finish creating the number of segments required.

Figure 143. Prime Core Blueprint Page: Segments Tab Without Any Segments Defined

The screenshot shows the 'Prime Core Blueprint' page for 'QualityAssurance1 Civic Literacy 1 General 1'. The 'Segments' tab is active. A message states: 'No segments defined. To split this test into segments, please choose the number of segments you would like below. Creating segments is optional.' Below the message, there is a dropdown menu for 'Number of Segments' set to '2' and a 'Set' button. A 'Save' button is visible in the top right corner.

Figure 144. Prime Core Blueprint Page: Segments Tab Listing Two Segments

The screenshot shows the 'Prime Core Blueprint' page for 'QualityAssurance1 Civic Literacy 1 General 1'. The 'Segments' tab is active, and two segments are listed. An '+ Add Segment' button is in the top right. The segments table is as follows:

Key	Name	Last Modified	Last Modified By	Review Status	Actions
22620662	QualityAssurance1 Civic Literacy 1 General 1 Segment 1	12/8/25 2:30:16 PM	[Avatar]	Blueprint Design	Edit Delete
22620668	QualityAssurance1 Civic Literacy 1 General 1 Segment 2	12/8/25 2:30:17 PM	[Avatar]	Blueprint Design	Edit Delete

- You can sort by selecting various column headers.
- To navigate to a segment, select its key, name, or **Edit** button, as available. Each segment contains tabs and settings similar to those on the blueprint level.

For more information about the **Attributes** tab, refer to [Blueprint Attributes](#). Note that CSR publication is always inherited from the parent blueprint.

When a segment is created, it copies any affinity groups and constraint settings that exist on its parent blueprint. After segment creation, blueprint-level modifications to affinity groups or constraint settings do not affect the segment level or vice versa. For more information about the **Constraints** tab, refer to [Blueprint Constraints](#).

Just as at the blueprint level, select **Save** after making edits, enter a comment in the pop-up, and select **Save** again. Saving a segment adds the latest version to its **Review and History** tab.

You cannot upload documents at the segment level.

Figure 145. Prime Segment Blueprint Page: Attributes Tab: Basic Attributes Sub-Tab

The screenshot displays the 'Basic Attributes' sub-tab within the 'Attributes' tab of the Prime Segment Blueprint page. The breadcrumb navigation at the top left includes 'Blueprint Home', 'Prime Core Blueprint: QualityAssurance1 Civic Literacy 1 General rg', and 'Prime Segment Blueprint: QualityAssurance1 Civic Literacy 1 General rg Segment 1'. A dropdown arrow is visible next to the segment breadcrumb. Below the breadcrumbs are tabs for 'Attributes', 'Constraints', 'Review and History', and 'Summary'. Under the 'Attributes' tab, there are sub-tabs for 'Basic Attributes', 'Field Test Parameters', and 'Scoring Attributes'. The 'Basic Attributes' sub-tab is active, showing fields for Name, Custom Identifier, Min Items, Max Items, Points Determine Form Length, and Max Points.


When accessing a segment, you can navigate back to the **Blueprint** page or the prime blueprint level by selecting the breadcrumbs at the top left. To quickly access a different segment on the same blueprint, select  in the segment-level breadcrumb and choose another segment's name, as in [Figure 146](#).

Figure 146. Detail of Prime Segment Blueprint Page with Breadcrumb Dropdown

The screenshot displays the breadcrumb navigation with a dropdown menu open. The breadcrumb navigation at the top left includes 'Blueprint Home', 'Prime Core Blueprint: QualityAssurance1 Civic Literacy 1 General 1', and 'Prime Segment Blueprint: QualityAssurance1 Civic Literacy 1 General 1 Segment 1'. The dropdown menu is open, showing options for 'QualityAssurance1 Civic Literacy 1 General 1 Segment 1' (selected) and 'QualityAssurance1 Civic Literacy 1 General 1 Segment 2'. Below the breadcrumbs are tabs for 'Attributes', 'Constraints', 'Review and History', and 'Summary'. Under the 'Attributes' tab, there are sub-tabs for 'Basic Attributes', 'Field Test Parameters', and 'Scoring Attributes'.

Each segment must go through the same review process as a blueprint, independent of its parent blueprint and sibling segments, and includes the same **Review and History** and **Summary** tabs. For more information, refer to [Reviewing a Blueprint](#).

Blueprint Constraints

The **Constraints** tab contains sub-tabs:

- [Standards](#)
- [Blueprint Elements](#)

Standards

The **Standards** sub-tab ([Figure 147](#)) displays a table of the standards to which all test items must be aligned. This table is initially populated based on a Content Standards Repository (CSR) publication, but only if the publication has optionally been selected in the **Attributes** tab > **Basic Attributes** sub-tab, as described in [Basic Attributes](#).

Figure 147. Prime Core Blueprint Page: Constraints Tab: Standards Sub-Tab

The screenshot shows the 'Standards' sub-tab in the 'Constraints' section of the Prime Core Blueprint page. The page title is 'Prime Core Blueprint: QualityAssurance1 ELA 1 General Demo1'. The 'Standards' sub-tab is active, and the 'Blueprint Elements' sub-tab is also visible. The 'CSR Publication' is 'AK-ELA-v1', with 'Min items: 1' and 'Max items: 10'. The interface includes a search bar, 'Expand All' and 'Collapse All' buttons, and an 'Export' button. Below the search bar is a table of content standards.

Content Standards	Level	Active	Used for Student Reporting	Used for Aggregate Reporting	Min Σ children	Max Σ children
<input type="checkbox"/> L Language <input type="checkbox"/> L.CSE Conventions of Standard English <input type="checkbox"/> L.CSE.1.1.a Demonstrate command of the conventions of standard English grammar and usage when writing or speaking; a. Print all upper-	1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3	6
	2	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	5
	3	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	5

- To expand parent standards and display their child standards, select **>** or **Expand All**. You can collapse them using **<** or **Collapse All**.
- To search the table, use the search field at the top-left corner.
- To export the table, select **Export**.

To make changes to the standard constraints using a spreadsheet instead of the UI controls, select the **Export** button, download the comma-separated values (CSV) file, edit it, and save it to your computer. Select the **Choose** button, choose the file from your computer, and then select **Import**. The standards appear in the table with your edits.

You can modify standard constraint settings directly in the UI as follows:

- Select the **Active** checkboxes to ensure that standards' minimum and maximum values (set below) are used to determine the number of matching items each test will require. If the **Active** checkbox is not selected, the standard does not affect test administration. Individual child standards can be marked active independent of their siblings.
- Select the **Used for Student Reporting** checkboxes for any standards that should be used to report individual student data.
- Select the **Used for Aggregate Reporting** checkboxes for any standards that should be used to report aggregate student data. This and the **Student Reporting** setting are independent of each other.

- Enter the minimum and maximum number of items that should be aligned to each parent and child standard. The Σ (sigma) children number appearing to the right of a parent standard's *Min* and *Max* text boxes represents the sum of all the active child standards' minimums and maximums.

When you are done setting standard constraints, you may wish to save. You can also use the **Discard changes** button to discard all the changes you've made since your last save.

Blueprint Elements

The **Blueprint Elements** sub-tab ([Figure 148](#)) displays a table of SOCKs and/or affinity groups associated with the blueprint. This table is initially populated based on a Content Standards Repository (CSR) publication, but only if the publication has optionally been selected in the **Attributes** tab > **Basic Attributes** sub-tab, as described in [Basic Attributes](#).

You can optionally constrain all tests to be aligned to these blueprint elements and/or designate them for use in reporting.

Figure 148. Prime Core Blueprint Page: Constraints Tab: Blueprint Elements Sub-Tab

Name	Actions	Used for Administration	Used for Student Reporting	Used for Aggregate Reporting	Min	Max
A Key Ideas and Details		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Affinity 1		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Argumentative_Conventions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Argumentative_Elaboration		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
Argumentative_Purpose		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0
R Craft and Structure		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	0	0

Showing 1 to 14 of 14 Rows


- To sort by element name, minimum, or maximum, select the column headers.
- To search the table, use the search field at the top-left corner.


- To export the table, select **Export**.


You can optionally create blueprint elements in two ways:



- Add new blueprint elements one at a time using the **New** button. In the pop-up that appears, enter a name for the element and choose whether the items are required to have the field test setting. Select **Save**.
- Import multiple blueprint elements using the **Choose** button. Select a comma-separated values (CSV) file from your computer, then select **Import**. The elements appear in the table.

Once blueprint elements are listed, you can modify their constraint settings. You can also manage affinity groups' item search criteria, names, and field test settings. Note that SOCKs are managed only using the Content Standards Repository (CSR) admin page.

- For each affinity group, you will need to create the item search criteria that define it. Select  in the *Actions* column. The **Search Criteria** window appears. In the **Search** tab, follow steps [3](#) and/or [4](#) of the instructions in [Search Across Banks](#). Select **Search & save** and review the search results in the **Results** tab, or alternatively select **Save & close**.

An alert icon  appears in the table when search criteria have not yet been set.

To review search criteria or results, select  again. In the **Search Criteria** window, you can refresh the search results by selecting **Search** or **Search & save**, as available. If the blueprint is not locked, you can modify criteria.

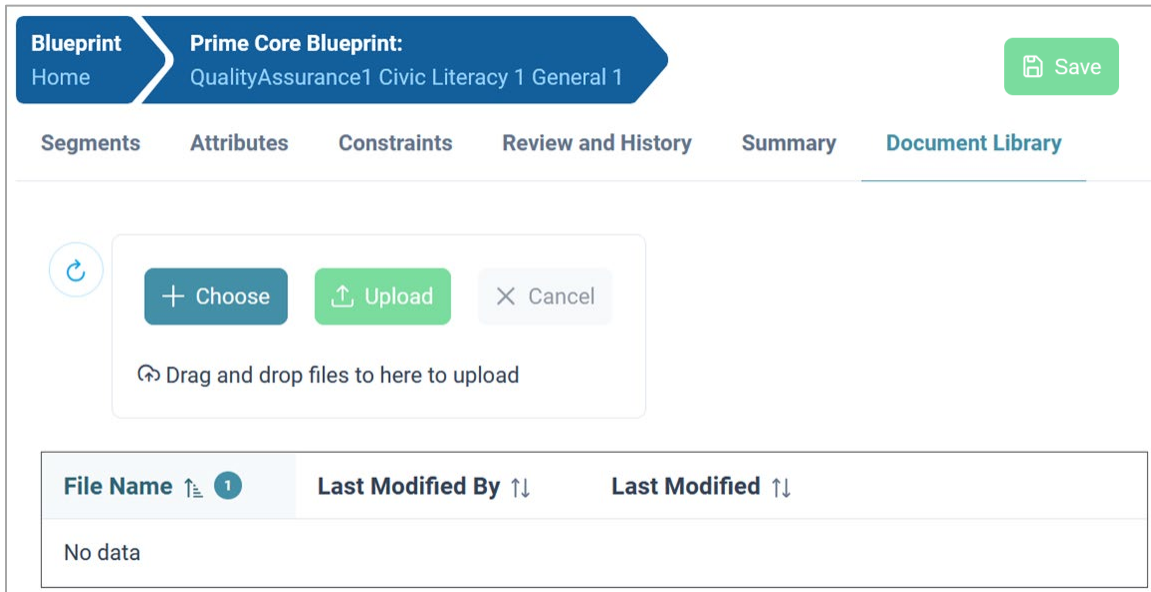
- You can edit an affinity group's name and field test setting by selecting  in the *Actions* column, or you can delete it by selecting .
- Select the **Used for Administration** checkboxes for elements that must be used to constrain the items on tests. This setting ensures that all items on the tests are aligned to the blueprint element.
- Select the **Used for Student Reporting** checkboxes for elements that should be used to report individual student data.
- Select the **Used for Aggregate Reporting** checkboxes for elements that should be used to report aggregate student data. This and the **Student Reporting** setting are independent of each other.
- In the *Min* and *Max* fields, enter the minimum and maximum number of aligned items required on each test.

When you are done setting blueprint element constraints, you may wish to save. You can also use the **Discard changes** button to discard all the changes you've made since your last save.




Blueprint Documents

In the **Document Library** tab (Figure 149), depending on the blueprint's status, you can attach supporting documentation, such as test design documents from the client. Multiple file types are permitted, including PDF, DOCX, DOC, XLSX, and XLS.

Figure 149. Prime Core Blueprint Page: Document Library Tab



To attach a document, select the **Choose** button, select the file from your computer, and then select **Upload**. The file is listed in the table.

- You can sort the table by selecting any column header.
- To refresh the information in the table, select  at the top.
- To download a file, select .
- To permanently remove a file, select . In the confirmation pop-up, select **Delete**.

Reviewing a Blueprint

When a prime core blueprint is initially saved, it enters the Blueprint Design status. It must subsequently progress through further statuses, which may include the following:

- **Senior Blueprint Review**
- **Tech Review**
- **Client Review**
- **Locked Status:** The blueprint cannot be edited in this status.

Depending on your role and the blueprint's current status, you can accept (move the blueprint to the next status), pend (keep it at the current status), or revise (move it to the previous status).

When you review a blueprint, you may find the read-only **Summary** tab helpful ([Figure 150](#)). At the top of this tab are same sub-tabs found under **Attributes**, and below that are the sub-tabs under **Constraints**, all displaying read-only details.

Figure 150. Prime Core Blueprint Page: Summary Tab Containing Sub-Tabs

The screenshot displays the 'Summary' tab of the Prime Core Blueprint page. The breadcrumb trail is 'Blueprint Home > Prime Core Blueprint: QualityAssurance1 Civic Literacy 1 General 1'. A 'Save' button is visible in the top right. The navigation tabs include 'Segments', 'Attributes', 'Constraints', 'Review and History', 'Summary', and 'Document Library'. Under the 'Summary' tab, there are sub-tabs for 'Basic Attributes', 'Field Test Parameters', and 'Scoring Attributes'. The form fields are as follows:

Name *	QualityAssurance1 Civic Literacy 1 General 1	Client *	QualityAssurance1
Subject *	Civic Literacy	Grade *	1
Target Population *	General	Custom Identifier *	1
Min Items *	1	Max Items *	10
Points Determine Form Length	--None--	CSR Publication	--None--

Below the form fields, there are tabs for 'Standards' and 'Blueprint Elements'. A search bar and an 'Export' button are present. The table below has the following structure:

Name	Used for Administration	Used for Student Reporting	Used for Aggregate Reporting	Min	Max
No data					

To complete your review, select the **Review and History** tab ([Figure 151](#)), which displays the review lane at the top. A padlock icon indicates whether the blueprint is locked. A clock icon indicates that the blueprint is not yet in the final review status.

Enter a comment in the text box. Then select one of the buttons, as available, to accept, pend, or revise.

Below the review controls in the **Review and History** tab are two tables:

- The *Review History and Comments* table records each status change. You can sort this table by selecting any column header.

- The *Version History* table records each saved version with the comments entered at save time. To access all the details about a version, select **Show details**. To access a list of changes from the previous version, select **Changes from previous version**. You can sort this table by selecting certain column headers.

Figure 151. Prime Core Blueprint Page: Review and History Tab

PrimeCoreBlueprint

PrimeCoreBlueprint Blueprint Design 4 Blueprint Design Senior Blueprint Review Tech Review Client Review Locked Status

Current Review Step: Blueprint Design

Enter comment here:

→ Accept → Pend

Review History and Comments

Review Lane	Review By	Review Level	Outcome	Comments	Date
PrimeCoreBlueprint		Blueprint Design	Create new Prime Core Blueprint	Create new Prime Core Blueprint	1/9/26 1:40:42 PM

Showing 1 to 1 of 1 Rows

Version History

Version	Comments	Created By User	Created Date	Actions
2	Manual (UJ) edits to Standards tab.		1/9/26 1:44:00 PM	Show details Changes from previous version
1	Initial save of Basic Attributes only, with AK-ELA-v1 publication.		1/9/26 1:40:42 PM	Show details

Managing Assessment Tools

You can manage the assessment publications used by the Test Delivery System (TDS) to present tests to students by using the links that appear when you hover over the *Assessment* menu in the banner.

Depending on your user role, the links that are available for managing the different assessment tools may vary.

This section describes how to do the following:

- [Manage Assessment Publications](#)

Manage Assessment Publications

An assessment publication is a group of tests that are administered during a specific testing window. For example, CAI may be contracted to provide 20 tests by subject or a combination of subjects for the spring 2026 administration for a specific client. These 20 tests and their specifications constitute a publication.

The publication drives the configuration file that is provided to TDS for administering tests to students.



Note: The test list itself is created in the FlightPlan system. When creating a publication, ITS retrieves the test list from the FlightPlan system and then specifies the other attributes.

For information about the FlightPlan system, please refer to the *FlightPlan Guide*.

[Table 7](#) lists the tasks involved in creating a publication.

Table 7. Tasks Involved in Creating a Publication

Task	Team Responsible	Description
Creating a New Publication	Content Operations team	The Content Operations team can create a new publication.
Setting Item Properties	Content Operations team	<p>The config Item Properties tab allows a user to include additional item attributes in the config file. These can include any attributes in the ITS item bank. The Content Operations team determines this set of item properties based on the requirements of the Psychometrics (Tech), Analysis, and Reporting teams.</p> <p>The IAT attributes ItemType, ScoringType, and Interaction are always automatically included in a config.</p>

Task	Team Responsible	Description
Managing Tests	<ul style="list-style-type: none"> Content Operations team Configuration team 	The Content Operations team can populate tests to a publication from any FlightPlan batches that are signed off through the publishing step, and share the client, season, and year attributes of the ITS publication. The Content Operations team also manages test specifications (blueprint constraints, affinity group constraints, proficiency levels, and more) that define all test-level attributes in the config. The Configuration team sets virtual test length, if any.
Managing Cover Pages	Content Operations team	The Cover Page tab allows the Content Operations team to add cover pages to items and tests.
Managing Configurations	Content Operations team	The Content Operations team manages all configurations that are generated from a publication in ITS. The Content Operations team organizes all config files from a given publication, and any associated reports (validation files, compare files, and other ancillary documents) in folders on ShareFile.
Generating Configuration Reports	Content Operations team	The Content Operations team can optionally generate configuration reports that provide certain data from the configuration file. The user must select a specific config ID and a configuration report template in order to generate the report.
Viewing Simulation Data and Updating from Simulation	Psychometrics (Tech) team	The Update From Simulation tab allows psychometricians to review the updates pushed (or published) from CAI's simulator tool, and to apply those updates.

Creating a New Publication

1. From the *Assessment* menu in the banner, select **Publication Maintenance**. The **Publications** page appears ([Figure 152](#)).

Figure 152. Publications Page

Publications

Source:

Subscribing Client:

Year:

Season:

Existing publications

Choose a publication from the list to edit.

Show entries Show Platform Review Publications Search:

Key	Name	Date	Year	Season	Tests	Forms	Active Items	Inactive Items
194618	New Publication	10/17/2022	2022-2023	Fall	0	0	0	0
194619	New Publication 2	10/17/2022	2021-2022	Spring	0	0	0	0
192432	UT SCI Benchmark FA22	8/1/2022	2022-2023	Fall	0	0	0	0
189393	New Hampshire NGSS Remote Fixed Form 2022	5/3/2022	2021-2022	Spring	0	0	0	0
188278	Delaware Spring 2022 Survey	4/4/2022	2021-2022	Spring	0	0	0	0
156583	ND NGSS Summative Spring 21-22	3/15/2022	2021-2022	Spring	0	0	0	0
159073	ND NGSS Summative Special Forms 21-22	3/15/2022	2021-2022	Spring	0	0	0	0
179691	USVI NGSS Summative Spring 21-22	3/8/2022	2021-2022	Spring	0	0	0	0
179709	New Hampshire NGSS Spring 2022	3/8/2022	2021-2022	Spring	0	0	0	0
188978	USVI NGSS Summative DEI Spring 21-22	3/8/2022	2021-2022	Spring	0	0	0	0

Showing 1 to 10 of 69 entries (filtered from 201 total entries) Previous 2 3 4 5 6 7 Next

All Config Files

Show entries Search:

Publication Key	Config ID	Date Generated	Generated By	Status	Download (Excel)	Validation Log	Download Content	Compare To:
78640	18133	3/15/2019 9:06:21 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
79396	18131	3/15/2019 6:39:02 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
79396	18130	3/15/2019 6:27:53 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
79396	18129	3/15/2019 6:14:14 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
79396	18128	3/15/2019 5:56:37 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
78640	18127	3/15/2019 5:40:50 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
79396	18126	3/15/2019 5:07:11 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
79396	18125	3/15/2019 4:50:35 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
78640	18122	3/15/2019 11:36:37 AM		Succeeded	Download	Download	Log	Choose: <input type="text"/>
76679	18116	3/14/2019 7:39:16 PM		Succeeded	Download	Download	Log	Choose: <input type="text"/>

Showing 1 to 10 of 100 entries Previous 2 3 4 5 ... 10 Next

- Select the publication values from the following dropdown lists:
 - Source:** The location from which the tests associated with the publication will be retrieved. Can be either FlightPlan or an older publication.
 - Subscribing Client:** The client for whom the publication is being created.
 - Year:** The administration year for the publication.
 - Season:** The test window associated with the publication.
- Click **Create a new publication**. The **New Publication** page appears, displaying a single **Attributes** tab ([Figure 153](#)).

Figure 153. New Publication Page: Attributes Tab

Publications → **New Publication**

Attributes

Publication Attributes

Name *

Date *

Season *
 Fall: Fall

Year *

Client Name *
 Florida: Florida

Include Student Help *

Contract

Save

4. Select or enter values for the different publication attribute fields. Fields marked with asterisks (*) are mandatory.
 - In the *Name* and *Date* fields, enter the publication name and the date when the tests go live. The date must be in mm/dd/yyyy format.
 - From the *Include Student Help* dropdown list, specify whether student help should be included or not.
 - *Optional:* From the *Contract* dropdown list, specify the contract type if desired.
5. Click **Save** before navigating to any other tab, because your edits will not save automatically. The publication key and name along with additional tabs are displayed ([Figure 154](#)). The publication is also listed in the *Existing Publications* section on the **Publications** page.

Figure 154. Publication Page: Attributes Tab

Publications → **Publication 2089681 - Math G3-8 Spring 2021**

[← Choose a different publication](#)

Name	Date	Year	Season	TestCount	FormCount
Math G3-8 Spring 2021	5/3/2021 12:00:00 AM	2020-2021	Spring	13	177

Attributes | Item Properties | Tests | Cover Page | Configurations | Config Reports | Update From Simulation

Publication Attributes

Name *

Date *

Season *

Year *

Client Name *

Include Student Help *
 Yes: Yes

Contract

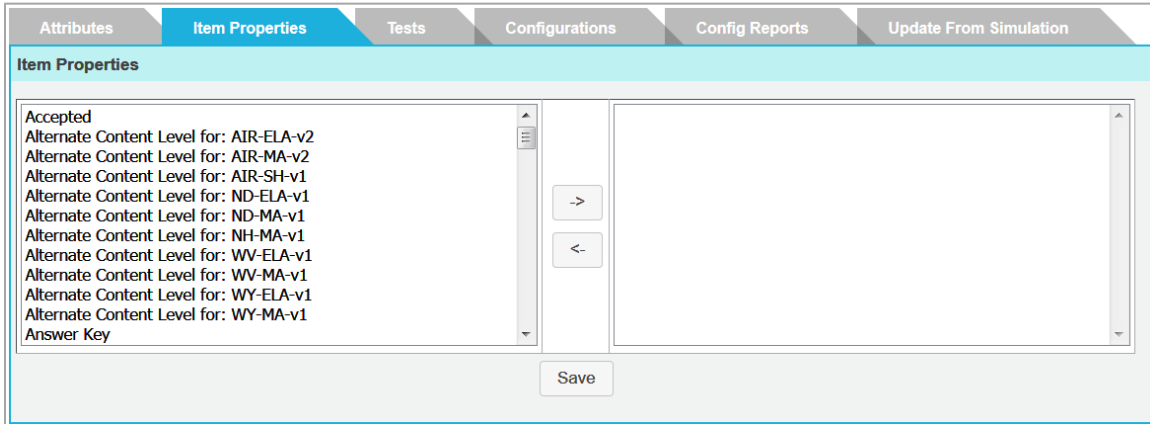
Save

Setting Item Properties

The **Item Properties** tab enables you to associate selected item properties with each item included in your publication.

1. Click the **Item Properties** tab. The **Item Properties** page appears ([Figure 155](#)).

Figure 155. Publication Page: Item Properties Tab



2. Select the item properties you wish to associate with the items in your publication from the list box on the left and click . (To select more than one at the same time, use the **Ctrl** or **Shift** key.) The item properties move to the list box on the right. You can associate up to 50 properties.
 - To remove item properties, select them from the list box on the right and click . The properties move back to the list box on the left.
3. Click **Save** to save your updates.

Managing Tests

The **Tests** tab enables you to associate tests with the publication and specify various test-related attributes.

When you're specifying the test parameters, fields with asterisks (*) are mandatory. If a field value is retrieved directly from FlightPlan, that field is grayed out.

Managing tests involves the following tasks:

- [Add and Remove Tests](#)
- [Edit Basic Test Attributes](#)
- [Edit Test Specification Attributes](#)

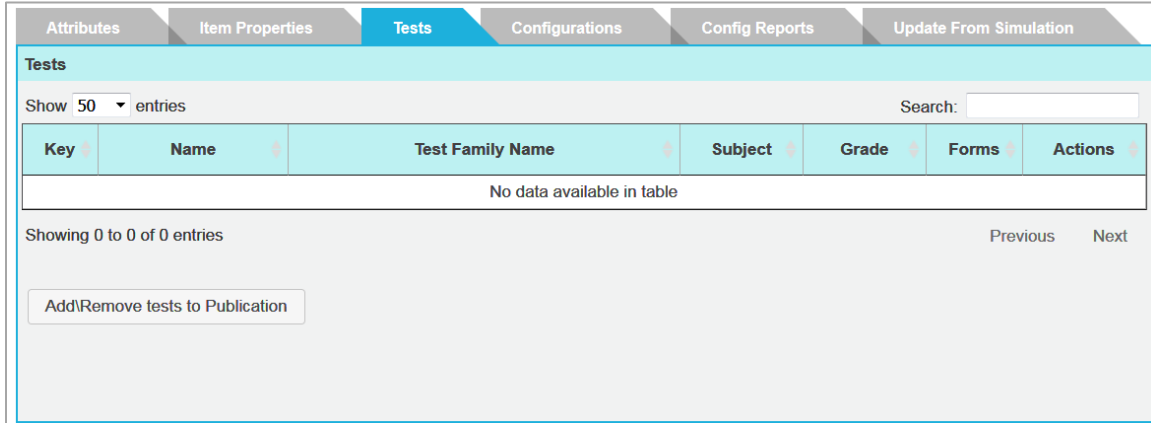
- [Edit Test Blueprint Attributes](#)
- [Set Virtual Test Length](#)
- [Configure Test Blueprint Constraints](#)
- [Configure Test SOCKs](#)
- [Edit Fixed Forms on Test](#)
- [Edit Test Item and Stimulus Attributes](#)
- [Manage Test Affinity Groups](#)
- [Edit Test Proficiency Levels](#)

When you're viewing a test, you can view a summary of your test parameters by clicking the **Summary** tab. The test attributes specified in all the earlier tabs are displayed.

Add and Remove Tests

1. Click the **Tests** tab on a publication ([Figure 156](#)).

Figure 156. Publication Page: Tests Tab (Unpopulated)



2. To add tests to your publication, click **Add\Remove tests to Publication**. The **Add Tests to Publication** window appears ([Figure 157](#)).

Figure 157. Add Tests to Publication Window

- From the *Test Family* dropdown list, select a test family. The available tests are displayed.

While you can add tests from different test families to your publication, you can only select tests from one test family at a time.

- Mark the checkboxes for the tests you want to add to the publication and click **Save**. A pop-up appears, confirming that the tests have been successfully selected.

If you select a multi-segmented test, each segment is listed as a separate test to enable you to specify test parameters for each segment.

- Click **OK** to return to the **Add Tests to Publication** window. To add more tests or to remove selected tests, continue to step [6](#). Otherwise, skip to step [7](#).

- Do one of the following:

- To add tests from a different test family, repeat steps [3](#)–[5](#).
- To remove a selected test, clear the checkbox for that test, click **Save**, then click **OK** on the confirmation message.

- To close the window, click the close button or **Cancel**. The publication's **Tests** tab now lists the selected tests ([Figure 158](#)).

Figure 158. Publication Page: Tests Tab (Populated)

Tests						
Key	Name	Test Family Name	Subject	Grade	Forms	Actions
2089683	(Florida)FL-GEN-SH-SH-Math-NA-Spring-2020-2021	Florida-GEN-SH-SH-SH	Student Help	NA	1	Edit
2089742	(Florida)FL-GEN-SUM-UD-MA-7-SEG1_NoCalc-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	7	14	Edit
2090322	(Florida)FL-GEN-SUM-UD-MA-7-SEG2_Calc-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	7	14	Edit
2090902	(Florida)FL-GEN-SUM-UD-MA-7-SEG3_Calc-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	7	14	Edit
2091482	(Florida)FL-GEN-SUM-UD-MA-8-SEG1_NoCalc-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	8	19	Edit
2092062	(Florida)FL-GEN-SUM-UD-MA-8-SEG2_Calc-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	8	19	Edit
2092642	(Florida)FL-GEN-SUM-UD-MA-8-SEG3_Calc-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	8	19	Edit
2093222	(Florida)FL-GEN-SUM-UD-MA-Paper-3-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	3	20	Edit
2093849	(Florida)FL-GEN-SUM-UD-MA-Paper-4-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	4	20	Edit
2094476	(Florida)FL-GEN-SUM-UD-MA-Paper-5-Spring-2020-2021	Florida-GEN-SUM-UD-MA	Mathematics	5	19	Edit

Showing 1 to 10 of 13 entries

Previous **1** 2 Next

Add/Remove tests to Publication

Copy Data from old test

Refresh test data from FlightPlan

8. *Optional:* To add more tests or remove tests, click **Add\Remove tests to Publication** and repeat steps [3–7](#) above.
9. *Optional:* To sync ITS with FlightPlan and retrieve the latest test lists, click **Refresh test data from FlightPlan**.
10. *Optional:* To copy forms from older test publications, do the following:
 - a. Click **Copy Data from old test**. The **Copy data from old test** window appears ([Figure 159](#)), listing all the tests associated with the publication.
 - b. *Optional:* To copy data from tests for a different year, make a selection from the dropdown list at the top and click **Set Year**.

Figure 159. Copy Data from Old Test Window

- c. To copy data from an old test for an associated test, from the dropdown list beside the associated test, select the test from which you wish to copy data.

Repeat this step for all the tests for which you wish to copy old data.

- d. Click **Save**. A pop-up appears, asking you to verify that you wish to copy old data.
- e. Click **OK** to continue. A confirmation message appears, indicating that the data have been copied successfully.
- f. Click **OK** to return to the **Tests** tab of the publication page.

Edit Basic Test Attributes

1. From the Actions column, click **Edit** for a test. The page for the selected test appears, open to the **Attributes** tab ([Figure 160](#)).

Figure 160. Test Page: Attributes Tab

2. Select or enter values for the available attribute fields as applicable.
 - From the *Selection Algorithm* dropdown list, select the required algorithm. For example, select **fixedform** for tests that have fixed questions. If questions should be selected based on students' responses to items, select the relevant algorithm.
3. Click **Save**. Additional test parameter tabs are displayed. Note that the tabs that are available may vary depending on the selected algorithm.

Edit Test Specification Attributes

1. Click the **Specifications** tab to edit the test specification attributes. Attributes for a typical fixed-form test are shown in [Figure 161](#) and for an adaptive test in [Figure 162](#).
 - Specify or enter the psychometric attributes that are used by TDS for configuring the item selection algorithm in the available fields/dropdown lists and click **Save**. Some fields are present only on adaptive tests. Attributes marked with an asterisk are required, but you may enter placeholder/dummy data, such as 0 or 1 as permitted, when the reporting scale is not available yet or when the adaptive algorithm is not implemented on any part of the test configuration. For an overview of the attributes, refer to [Table 8](#). Also note that clicking certain fields and dropdown lists opens pop-ups with more information.
 - The information that you enter in this tab should come from the Scoring Specifications document for the corresponding test.
2. Click **Save**.

Figure 161. Fixed-Form Test Page: Specifications Tab

The screenshot displays the 'Specifications' tab for a Fixed-Form Test. The interface is organized into two columns of input fields. The left column contains fields for 'Included Stimuli' (dropdown), 'Start Ability' (text), 'Start Information' (text), 'Slope' (text), 'Intercept' (text), 'Weight' (text), 'Cut Ability' (text), 'Lambda Multiplier' (text), 'Cset1 Size' (text), and 'Cset1 Order' (dropdown). The right column contains fields for 'Cset2 Random' (text), 'Cset2 Initial Random' (text), 'TDS Test Prefix' (text), 'Stat Domain' (dropdown), 'Item Weight' (text), 'Ability Offset' (text), 'Ability Weight' (text), 'Test Label' (text), 'Set Difficulty to 0 Where Missing' (dropdown), 'Compute Segment Ability?' (dropdown), and 'Score Card Layout' (dropdown). A 'Save' button is positioned at the bottom center of the form.

Figure 162. Adaptive Test Page: Specifications Tab

Table 8. Overview of Test Specification Attributes

Attribute	Description	Fixed Form	Adaptive
Included Stimuli	Specifies whether stimuli are included in the test.	Depends whether we have stimuli	Depends whether we have stimuli
Start Ability	The start ability is only used if there are no historical data that can be used for an adaptive test. Start ability should be specified in the scale score metric. The unscaled value $(\text{ability} - \text{intercept}) / \text{slope}$ should fall between -6 and 6 on the theta scale.	Not applicable	Applicable
Start Information	When this field is not applicable, enter 0.2 as a placeholder/dummy value.	Not applicable	Applicable
Slope	The slope and intercept of the linear transformation of the theta score to the scale score. The slope value cannot be 0 . When there is no transformation or the transformation is not known yet (for example, a field test), use a slope of 1 and an intercept of 0 (that is, the identity transformation).	Applicable	Applicable
Intercept		Applicable	Applicable
Weight	The value must unscale by $(\text{ability} - \text{intercept}) / \text{slope}$ to a valid logit value (~ -6 to $+6$).	Not applicable	Applicable
Cut Ability	Can be the cut score for proficient in reporting scale.	Not applicable	Applicable

Attribute	Description	Fixed Form	Adaptive
Lambda Multiplier	This field sets the relative weight of one strand compared to others in computing the match to ability.	Not applicable	Applicable
Cset1 Size	Size of candidate pool of the items based on contribution to blueprint match.	Not applicable	Applicable
Cset1 Order	Method used to order Cset1. This is only applicable to adaptive tests and test segments. The default value is ABILITY , which will be used if nothing is selected.	Not applicable	Applicable
Cset2 Random	Size of final candidate pool of the items from which to select an item randomly.	Not applicable	Applicable
Cset2 Initial Random	Size of candidate pool of the items based on contribution to blueprint match for the first item or item set selected.	Not applicable	Applicable
TDS Test Prefix	Formerly used to customize test names, but this is now done in FlightPlan without using prefixes. The field cannot be edited and will typically read "NA".	Already defined in FlightPlan	Already defined in FlightPlan
Stat Domain	The stat domain is used when there are multiple sets of parameters for an item. If you do not select an option from this dropdown, the item stats for a form may not appear properly.	Applicable	Applicable
Item Weight	For adaptive tests, this field specifies the blueprint scalar for items in the final selection to determine which ones may need to be filtered out.	Not applicable	Applicable
Ability Offset	This is used to make the adaptive ability match harder (>0), easier (<0) or not used (=0). Must be on a logit scale (~-6 to +6).	Not applicable	Applicable
Ability Weight	This is used to put emphasis on ability match as compared to the blueprint match. Default is 1.	Not applicable	Applicable
Rc Ability Weight	The priority weight associated with reporting category information.	Not applicable	Applicable

Attribute	Description	Fixed Form	Adaptive
Precision Target Met Weight	Overall information weight when the information target has been hit.	Not applicable	Applicable
Precision Target Not Met Weight	Information weight when the precision target has not yet been hit.	Not applicable	Applicable
Termination Too Close	When set to Yes , terminates if you are not sufficiently distant from the specified adaptive cut.	Not applicable	Applicable
Termination Overall Info	Can be Yes or No . Determines whether to use the overall information target as a termination criterion.	Not applicable	Applicable
Termination RC Info	Can be Yes or No . Determines whether to use the reporting category information target as a termination criterion.	Not applicable	Applicable
Termination Min Count	Can be Yes or No . Determines whether to use minimum test size as a termination condition.	Not applicable	Applicable
Termination Flags And	Can be Yes or No . Determines whether the other termination conditions are to be taken separately or conjunctively.	Not applicable	Applicable
Test Label	The label used to identify the test. This field cannot be edited.	Already defined in FlightPlan	Already defined in FlightPlan
Set Difficulty to 0 Where Missing	Set to Yes to ignore when items have missing difficulty values. Items that don't have difficulty values will get the value 0.	Not applicable	Applicable
Compute Segment Ability?	This dropdown list tells TDS to estimate the starting ability of the next segment based on the results of this segment.	Not applicable	Applicable
Precision Target	Target information for the overall test. Required for adaptive segments when the new AA is being used.	Not applicable	Applicable

Attribute	Description	Fixed Form	Adaptive
Ability Test ID	The test ID of another test that can supply a starting theta value. If this is set, then the slope and intercept values collected from ITS at the test level will be applied whether the score comes from a previous opportunity in the same year or from a previous year.	Not applicable	Applicable
Score Card Layout	This dropdown list allows you to hide all item content on the screen from the user, so that the only things they can view are an item position number and the response interaction. Select Yes to enable score card layout.	Applicable	Applicable
Initial Ability Years	This dropdown list defines how far back the adaptive algorithm will look when trying to estimate a student's initial ability level. <ul style="list-style-type: none"> • 3: This year + 2 historical years (default). • 2: This year + 1 historical year. • 1: Only this school year. • 0: No historical data will be used, not even from the current year. 	Not applicable	Applicable

Edit Test Blueprint Attributes

Click the **Blueprint** tab to view the blueprint attributes ([Figure 163](#)).

Specify the parameters and click **Save**. [Table 9](#) lists the available attributes, which vary depending on certain selections.

Figure 163. Test Page: Blueprint Tab

Table 9. Overview of Test Blueprint Attributes

Attribute	Description
Set of Grades	A comma-separated list of the grades this test can be administered to.

Attribute	Description
Field Test Algorithm	<p>Field test items are selected randomly from the pool of field test items until the total number of selected items (or total LOE of selected items, as described below) has reached the specified number. Three field test item selectors are available:</p> <ul style="list-style-type: none"> • FT1 (sometimes called “Legacy”) is the legacy selector that pulls each field test item randomly in accordance with its relative frequency specified in the config (or equal frequency if nothing is specified). FT1 requires that item passages be subdivided into sets (called blocks). These blocks of items are administered as a complete group. The order of items within a block is also predetermined by the config. <ul style="list-style-type: none"> ○ The FT1 selector can utilize total field test item count or total FT LOE value of administered items as termination criteria. If item count is used for termination, field test items are selected on the fly as the student goes through the test. If LOE is used for termination, field test items are selected prior to the start of a test. Selected field test passages are removed from the operational pool if the passage contains a mix of field test and operational items. • FT2 (previously called “New”) overlays an adaptive selector onto field test item positions within the segment. Field test items can be assigned blueprint values if non-trivial field test affinity groups are specified and aligned to field test items. The FT2 selector uses an adaptive algorithm to order item groups based on their blueprint value. It takes the top designated number of item groups, and because information value for all items is unknown, it proceeds to select from the remaining set randomly with uniform probability. Just like in operational adaptive algorithm, after blueprint checks pass, each remaining passage (note that discrete items are each assigned a one-item passage with an equivalent name) has an equal chance to be administered in each field test position. Passage attributes MaxItems and NumResponses are used to determine the maximum and minimum number of items from the passage that can be administered at once, respectively. • FT3 works similarly to FT2, with the added feature of allowing the ITS user to change the default relative frequency of passages and discrete items. FT3 executes the blueprint satisfaction step first. It then chooses from the remaining set randomly with weighted distribution so that the relative frequency of passages and items matches the values specified in the config.
Fa Cset 1 Order	<p>When selecting FT items, this is the method used to order Cset1. This is only applicable to adaptive tests and test segments. The default value is DISTRIBUTION, which is used if nothing is selected.</p>
Fa Cset 2 Random	<p>When selecting FT items, this is the size of the candidate pool of the items based on contribution to blueprint match for the first item or item set selected.</p>

Attribute	Description
Fa Cset 1 Size	Defines the number of items to include in the Field Test Cset1. If no value is entered here, the value entered for the (operational) Cset 1 Size attribute will be used.
Fa Cset 2 Initial Random	Defines the size of the Field Test Cset2 (final candidate set) for the first field test item or set selected, based on the contribution the item makes to meeting all the blueprint requirements. If no value is entered here, the value from the Fa Cset1 Size attribute will be used.
Points Determine Form Length	<p>For fixed-form tests only, specifies what determines the length of the test.</p> <ul style="list-style-type: none"> • Yes: The length of the form will be determined by the points value specified below. • No: The length of the form needs to be between the <i>Min Items</i> and <i>Max Items</i> values specified below, inclusive.
Min Points	The minimum sum of the points for all items on each form on the test.
Max Points	The maximum sum of the points for all items on each form on the test.
Min Items	For fixed-form tests, this is the number of items on the smallest form. For adaptive tests, this is the minimum number of items required to be administered on a test.
Max Items	For fixed-form tests, this is the number of items on the largest form. For adaptive tests, this is the maximum number of items that may be administered on a test.
Is Maximum a Strict Constraint	Defines whether the adaptive algorithm can exceed the maximum number of items in certain circumstances in order to satisfy other blueprint requirements.
FT Min Items	The minimum number of field test items to be administered.
FT Max Items	The maximum number of field test items to be administered.
FT Start Pos	The first position on the test in which a field test item can be administered. For a test that contains only field test items, this value should be 1.
FT End Pos	The last position on a test in which a field test item can be administered. For a test that contains only field test items, this value should be MaxItems.
Min LOE	The minimum Level Of Effort for operational items.
Max LOE	The maximum Level Of Effort for operational items.
FT Min LOE	The minimum Level Of Effort for field test items.
FT Max LOE	The maximum Level Of Effort for field test items.

Attribute	Description
Virtual Test Name	Read-only field. The name of the virtual test this segment belongs to.
Segmented Test Position	Read-only field. The number of this segment in a virtual test.
Is Initial Segment	Determines whether this is the first segment of a multi-segmented test.
Is Final Segment	Determines whether this is the last segment of a multi-segmented test.
Transition Functions	The Transition Functions attribute in a segment state defines the rules for moving from one state to another within an adaptive test. It includes conditions based on scores or score ranges, with an optional Modulo condition to filter eligible transitions further. The syntax specifies which target state a student should be routed to based on their score upon completing a segment. For example, a rule like 5,10:TargetStateA; would route students with scores between 5 and 10 to TargetStateA. Modulo conditions allow the system to route only certain students to specific paths, achieving targeted distribution across different routes in the test.
Segment State	Specifies the segment state that this segment belongs to. A segment state in an adaptive segmented test is a group of test segments treated as a single “state” within the student’s progression through the test. Each segment within a segment state must have the same values for each of these attributes: Transition Functions, Is Initial Segment, and Is Final Segment. When the student completes a segment, the system evaluates conditions (such as scores) to determine if a transition to a new segment state is needed. Segment states streamline the test structure, allowing multiple segments to be managed as a unit with common criteria for progression.
Sigma Function	<p>The Sigma Function attribute in a segment state defines how the score is calculated for a test segment. This definition is used in determining the next segment to be given to the student. Sigma Function options include the following:</p> <ul style="list-style-type: none"> • Local/Global Raw Score: Counts total points awarded in a single segment (Local) or across all segments visited so far (Global). • Local/Global FT Score: Similar to Local/Global Raw Score, but includes both operational and field test items. • Local/Global No Response: Counts unanswered items in the segment or across all segments. • Theta Score: Estimates the student's ability as a floating-point value. • ETS Field Test 2017: Counts the number of segments that the student has already completed. Whereas the other sigma functions count particular scores or response options, the “score” of the student when using this option is the count of the segments the student has been routed to.

Set Virtual Test Length

The **Virtual Test** tab ([Figure 164](#)) appears only for a test that is a segment in a virtual test, as configured in FlightPlan. The Configuration team estimates virtual test length in this tab so that it can be displayed in the Test Delivery System (TDS).

To complete this tab, enter the estimated number of items in the *Virtual Test Length* field and select **Save**.

Figure 164. Test Page: Virtual Test Tab

Configure Test Blueprint Constraints

Click the **Constraints** tab to view the **Blueprint Constraints** page ([Figure 165](#)). Do the following to configure the content standards that are going to be tested.

Figure 165. Test Page: Constraints Tab

Content Standards	Active	Min	Max	Weight	Strict
SH-UD	<input checked="" type="checkbox"/>	11	11	1	<input checked="" type="checkbox"/>

1. From the *CSR Publication used for this test* dropdown list, select the content standard publication you wish to use for the test and click **Set**. For more information, refer to [Managing Content Standard Publications](#).
2. A message appears, indicating that the content standards for the selected publication will be displayed. Click **OK** to close the message.
3. Add constraints directly through the user interface or by uploading a file.

- To add blueprint constraints directly in the **Constraints** tab:
 - i. From the Active column, mark the checkboxes for the standards that you wish to test.
 - To view the child entities of a particular content standard, click ► beside it.
 - To view content standards for all the levels, click **Expand All**. To collapse the hierarchy and view only the Level 1 content standards, click **Collapse All**.
 - To filter content standards, enter text in the *Filter* field. You can hide all nodes that don't match your filter text by marking the **Hide unmatched nodes** checkbox. To clear filters, click **x**.
 - ii. Enter the maximum and minimum number of items to be included for the selected content standards, and the weight of those items.
 - iii. In the *Strict Max* column, mark the checkbox if the maximum number of items should be strictly enforced.
 - iv. Click **Save Changes**. A message appears, indicating that the constraints have been successfully saved.
 - v. Click **OK** to close the message.
 - To import constraints:
 - i. Click **Import Constraints**. A window to your computer opens.
 - ii. Next, select the constraints file that you have saved on your computer and click the appropriate button to upload the file. A table displays the constraints that are being updated.
 - iii. Click **Submit** to import the constraints. A confirmation message appears, indicating that the constraints have been successfully imported.
 - iv. Click **OK** to close the message.
4. *Optional:* To export the configured constraints to a comma-separated values (CSV) file, click **Export Constraints**.

Configure Test SOCKs

Click the **SOCKs** tab to view the *Blueprint SOCKs* page ([Figure 166](#)). To configure the SOCKs, follow steps [3](#) and [4](#) in the section [Configure Test Blueprint Constraints](#), except with reference to SOCKs rather than blueprint constraints.

Figure 166. Test Page: Socks Tab

Socks	Active	Min	Max	Weight	Strict Max
DoK 1	1	0	0		
DoK 2	1	0	0		
DoK 3	1	0	0		

Edit Fixed Forms on Test

Click the **Forms** tab, if available ([Figure 167](#)). It lists all the fixed forms associated with the test. This tab is only displayed for forms that use the fixedform selection algorithm.

Figure 167. Test Page: Forms Tab

Publications → Publication 108376 → Tests → Test 112134 - (AIR)AIR-GEN-INTR-UD-SC-ESS_EarthSys_2-5-Fall-2020-2021 Next →

Test: 112134 Name: (AIR)AIR-GEN-INTR-UD-SC-ESS_EarthSys_2-5-Fall-2020-2021 AssessmentSubType: UD
 AssessmentType: INTR efx_CSSR_Publication: NGSS-SC-v1 FPTestFamilyName: AIR-GEN-INTR-UD-SC Grade: 5
 selectionAlgorithm: fixedform Subject: Science TargetPopulation: GEN

Attributes Specifications Blueprint Constraints Socks **Forms** Item Pool Affinity Proficiency Levels Summary

Form

Science-Int-ESS_EarthSys_2-5-FA20-ENU (803)
 Science-Int-ESS_EarthSys_2-5-FA20-ESN (804)

View Edit Reports

Edit Basic Fields | Form: Science-Int-ESS_EarthSys_2-5-FA20-ENU

Key 803
 Name Science-Int-ESS_EarthSys_2-5-FA20-ENU
 Review Status Not Submit Status

Edit Attributes

Form Attributes

Used for TDS Configuration * Yes
 Yes:

Form Cohort * Default
 Default
 Default:

SelectionAlgorithm fixedform
 fixedform:

Language ENU
 ENU:

Fixed Form Start Date
 Fixed Form End Date
 Session Start Value

- To view a form, select the form and click **View**. The form attributes are displayed.
- To edit a form, select it and click **Edit**. Edit the form attributes as applicable and click **Save**.
- To generate reports for a form, select the form and click **Reports**.
 - From the **Actions** panel that displays, click **Report** and then select the report you wish to generate. For information on how to generate the different reports, refer to [Action Center](#).

Edit Test Item and Stimulus Attributes

1. Click the **Item Pool** tab ([Figure 168](#)), which displays a list of all the items and stimuli associated with the test along with their attributes, such as item position, item status, and item weight if applicable.

2. If necessary, from the *Select Form Key* dropdown list, select a form. Form options are only available for tests that use fixedform selection algorithm; an adaptive test, such as a linear on-the-fly test (LOFT), has only a single form.

Figure 168. Test Page: Item Pool Tab

Publications → Publication 108376 → Tests → Test 112134 - (AIR)AIR-GEN-INTR-UD-SC-ESS_EarthSys_2-5-Fall-2020-2021 Next →

Test: 112134 Name: (AIR)AIR-GEN-INTR-UD-SC-ESS_EarthSys_2-5-Fall-2020-2021 AssessmentSubType: UD AssessmentType: INTR
 eff_CSSR_Publication: NGSS-SC-v1 FPTestFamilyName: AIR-GEN-INTR-UD-SC Grade: 5 selectionAlgorithm: fixedform Subject: Science
 TargetPopulation: GEN

Attributes Specifications Blueprint Constraints Socks Forms **Item Pool** Affinity Proficiency Levels Summary

Select Form Key: 803: Science-Int-ESS_EarthSys_2-5-FA20-ENU

Edit Item Association for Form 803
 To delete item(s) from association, please select item(s) and click on "Delete" button to delete.
 To update association values, please select item(s), set association values, and click on "Save" button to save.
 To change item position, please select item(s), use Up&Down button to move up or move down, and click on "Save" button to save.

Legend:
 P-Position, R-Role, W-Weight, F-IsFieldTest, A-Active, B-Block, Re-IsRequired, L-Language, NFS-NotForScoringOverride, ILO-ItemLockingOverride, RT-Response Type, LOE-LOE_Override

ID	Stim	P-1	R-Operational	W	F.No	A.yes	B.A	Re.no	L.E	NFS-Default	ILO.No	RT	LOE	Desc
1797	Stim316	P-1	R-Operational	W	F.No	A.yes	B.A	Re.no	L.E	NFS-Default	ILO.No	RT	LOE	Desc:Chesapeake Bay Item 1

[View Item](#)

Block: -- Set Block --
 IsRequired: -- Set IsRequired --
 NotForScoringOverride: -- Set Not For Scoring --
 Weight:
 ItemLockingOverride: -- Set Item Locking Override --
 ResponseType: -- Set Response Type --
 LOE Override: -- Set LOE Override --

[Save](#)

Edit Stimulus Association for Form 803
 To update association values, please select stimulus, set association values, and click on "Save" button to save.

Legend:
 M-MaxItems, Num-NumResponses

ID	M	Num	Desc
316	M	Num-1	Desc:Chesapeake Bay Stimulus

[View Stimuli](#)

MaxItems:
 Num Responses:

[Save](#)

Edit Assertion Association for Form 803
 To update assertion level not for scoring, please select item(s)/assertions, set values, and click on "Save" button to save.

Legend:
 NFS-NotForScoringOverride

ID: 1797 NFS: AassertionName:AS-FirstSentenceCorrect
ID: 1797 NFS: AassertionName:AS-FreshwaterCorrectInPartA
ID: 1797 NFS: AassertionName:AS-GreaterProportionOfFreshwaterCorrect
ID: 1797 NFS: AassertionName:AS-GreaterProportionSaltwaterColumnCorrect
ID: 1797 NFS: AassertionName:AS-PartDCorrect
ID: 1797 NFS: AassertionName:AS-PieGraphCorrectInPartC
ID: 1797 NFS: AassertionName:AS-ProportionsRemaintheSame
ID: 1797 NFS: AassertionName:AS-SaltwaterCorrectInPartA
ID: 1797 NFS: AassertionName:AS-SecondSentenceCorrect

NotForScoringOverride: -- Set Not For Scoring --

[Save](#)

3. In the *Edit Item Association for Form* section, manage the items associated with this particular test or form as follows:
 - a. Select an item or items from the list. You can select multiple items by holding down **Ctrl** or **Shift**.
 - b. *Optional*: To view a single selected item, click **View Item**. A new browser tab or window opens, displaying the *View\Edit Item* page.
 - c. Specify attributes (such as an item's active status, the block it should be associated with, and whether it is a field test item) using the available dropdown lists and fields. These attributes apply only to the associated test and form, and do not affect the items themselves. Any attributes you do not set will remain as is. Attributes include the following:
 - **Role**: Allows you to label items with the operational, field, or other roles. Although the item role doesn't appear in the config, it will be used in bookmaps.
 - **IsFieldTest**: If this attribute is set to **No**, the item will require parameters.
 - **IsActiveOnForm**: Infrequently used. Overrides items' active statuses.
 - **Block**: Used to separate items within a passage into different groups. Blocking is used to field-test items associated with a stimulus when there are more items on the stimulus than there are field test slots available per student in a LOFT. For example, you may set blocks in order to field-test a stimulus with one group of items (a block) and field-test the same stimulus with a different group of items (another block). Assign each item a block letter, such as **A**, **B**, or **C**. The alphabetical order of the blocks has no effect. Items that are not manually associated with blocks default to block A.
 - **IsRequired**: Controls whether items are skippable. It is set by default to **Yes** for discrete items and **No** for passage items. To make an item skippable, this attribute must be set to **No**. If the item is a passage item, the *Num Responses* field for the passage must be set to 0 (refer to step 5).
 - **NotForScoringOverride**: Used to override the NFS attribute for the item in ITS. If the item has an NFS value of **No** (or if the item has a blank value, meaning it is **No** by default) and the override is set to **Yes**, the item will not be scored.
 - d. Repeat these steps as needed.
4. Below the item attribute settings, click **Save**. If you switch to another tab without saving, your changes will be lost.

5. In the *Edit Stimulus Association for Form* section, do the following:
 - a. Select a stimulus or stimuli from the list. You can select multiple stimuli by holding down **Ctrl** or **Shift**.
 - b. *Optional*: To view a single selected stimulus, click **View Stimuli**. A new browser tab or window opens, displaying the **View\Edit Stimulus** page.
 - c. Specify stimulus attributes using the available fields. These attributes apply only to the associated test and form, and do not affect the stimuli themselves. Any attributes you do not set will remain as is. Attributes include the following:
 - **MaxItems**: The maximum number of items a student can receive from the listed passage. This value is only applicable for operational passages (that is, passages for which *IsFieldTest* is set to **No**) on adaptive tests.
 - **Num Responses**: The default value for this field is -1, which means the passage is required. If passage items need to be skippable, this field must be set to 0.
 - d. Repeat these steps as needed.
 - e. Below the stimulus attribute settings, click **Save**. If you switch to another tab without saving, your changes will be lost.

Manage Test Affinity Groups

Within a test, an affinity group is a collection of items. Each affinity group has a limit on how many of the items a student may receive. An affinity group is similar to a SOCK in that it allows for setting constraints on categories of items that are not standards, though it can be used for standards as well.

Here are some examples of how an affinity group might be useful:

- Limiting the number of Choice items. An affinity group could be created for all Choice items on the test, with *Max Items* set to a specific number. This would ensure that students don't receive too many Choice items and are exposed to a variety of question types.
- Ensuring that each student receives at least one item that requires the use of a calculator. An affinity group could be created for all items that require a calculator, with *Min Items* set to 1.
- Ensuring that students receive a certain number of questions per topic. An affinity group could be created for each topic, with *Min Items* and *Max Items* set to a specific number. This would ensure that students are exposed to a balanced mix of questions from all the topics.

You can add and/or edit affinity groups on a test using the **Affinity** tab on a test.

1. Select the **Affinity** tab ([Figure 169](#)).

Figure 169. Test Page: Affinity Tab

2. Use the *Affinity Key* dropdown list to select an existing affinity group to edit, or set it to **None** to create a new group. Then edit the other dropdown lists and fields provided:
 - *Name*: The name of the affinity group.
 - *Is Field Test*: A toggle to indicate whether the items in this group are field test items.
 - *Min Items*: The minimum number of items a student must receive from the affinity group.
 - *Max Items*: The maximum number of items a student can receive from the affinity group.
 - *Is Maximum a Strict Constraint*: A toggle to indicate whether a student may receive more than the maximum number specified if necessary to satisfy other constraints on the test. (The minimum number specified does not affect this setting.)
 - *Weight*: The weight assigned to the affinity group. This weight gives a level of importance to the constraint.
3. When you have made your edits, click on **Insert/Save** to save the affinity group.
4. To define the items that will belong to this affinity group, click **Insert/Save Criteria** to open the ITS search window described in [Searching for an Item or Stimulus](#). When you click **Save Search Criteria** in this window and then click **OK** in the confirmation pop-up, a list of the criteria appears below the dropdowns and fields.

To delete the current affinity group, click **Delete** and then click **OK** in the confirmation pop-up.

Edit Test Proficiency Levels

Click the **Proficiency Levels** tab ([Figure 170](#)). Update the cut scores for each proficiency level as described below and click **Save Changes**.

- To update a level name, enter the modified description in the Label field.
- To specify the scale score ranges, use the arrows in the ScaledLo and ScaledHi columns. ScaledLo designates the cut score for that proficiency level, while ScaledHi would be the cut score for the next proficiency level. Therefore, the ScaledHi value for each level should match the ScaledLo value for the next proficiency level in the sequence. For the highest achievement level, the ScaledHi value should match the highest achievable scale score (HOSS) for the test.
- To add a new level, click **Add Level**.
- To delete the last level, click **Delete Last Level**.

Figure 170. Test Page: Proficiency Levels Tab

Level	Label	ScaledLo	ScaledHi
1	Inadequate	0	5
2	Below Satisfactory	5	10
3	Satisfactory	10	15
4	Above Satisfactory	15	20
5	Mastery	20	100

Buttons: Add New Level, Delete Last Level, Save Changes

Managing Cover Pages

A cover page is a special type of item, similar to a stimulus, that contains instructions or other helpful information. It may be displayed to the student before or after an item, or at the beginning or end of a test.

The **Cover Page** tab ([Figure 171](#)) lists the publication's cover pages (by reference item key) in a table. You can use this tab to set cover pages either one at a time or in a mass upload.

Figure 171. Publication Page: Cover Page Tab

Update From Simulation

Mass Upload Cover Pages

Tests * None

Forms Please select Test load forms

Items Please select test or Form to load items

Reference Type CoverPage

Placement * After

Order * 1

Filter: Check List Cover Page Sound Cue Tutorial

Reference Items * --Choose a reference item--

Save

Show 10 entries Search:

Test Key	Test Name	Form Key	Form Name	Item Id	Placement	Order	Reference Item Key
Delete 20326470	(QualityAssurance1)QA1-ALT-EOC-UD-ELA-1111-4-SEG3-Fall-2022-2023	101579	ELA G4 FixedForm ENU Online Fall 22-23 WSMR100424_4blockmr	17999	After	1	20318
Delete 20326470	(QualityAssurance1)QA1-ALT-EOC-UD-ELA-1111-4-SEG3-Fall-2022-2023	101579	ELA G4 FixedForm ENU Online Fall 22-23 WSMR100424_4blockmr	20647	After	1	20668
Delete 20326470	(QualityAssurance1)QA1-ALT-EOC-UD-ELA-1111-4-SEG3-Fall-2022-2023	101579	ELA G4 FixedForm ENU Online Fall 22-23 WSMR100424_4blockmr	20807	After	9	2368

You can delete an existing cover page by clicking **Delete** to the left of the test key in the table. In the confirmation pop-up, click **OK**.

Add a Single Cover Page

Use the dropdown lists ([Figure 171](#)) to add a single cover page. *Reference Type* is preset.

- *Test*: The test on which the cover page will appear.
- *Form*: The form with which the cover page will be associated. If you select **None**, the cover page will be associated with all possible forms.
- *Item*: The item the cover page will be next to, if any. If the cover page is for the beginning or end of the form or test, select **None**.
- *Placement*: **Before** places the cover page before the item selected above or at the beginning of the test, whereas **After** places it after the item or at the end of the test.

- **Order:** If multiple cover pages have the same placement relative to a certain item, test, or form, this dropdown determines the position of each cover page in the sequence. Selecting **1** places the cover page before any others with the same placement, and selecting **10** places it after. Numbers need not be consecutive as long as they are in order. No two cover pages with the same placement can have the same position.

If no other cover page shares the selected placement, the *Order* setting has no effect. Cover pages default to an order position of 1.

- **Reference Items:** The cover page item.
 - Use the checkboxes above this dropdown list to filter the items listed.

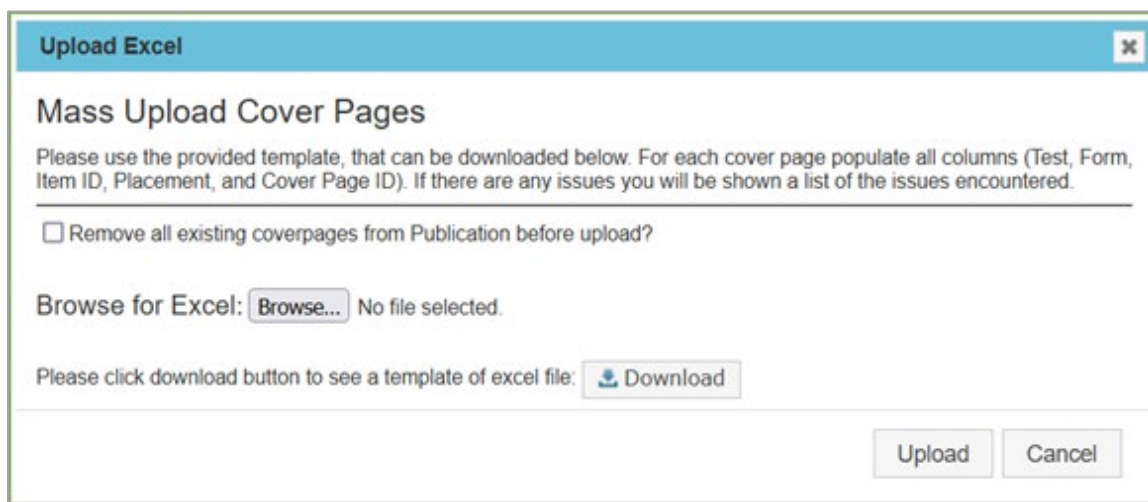
After making your selections, click **Save**. In the confirmation pop-up, click **OK**. The added cover page appears in the table.

Mass-Upload Cover Pages

You can assign multiple cover pages at once using an upload.

1. Click the **Mass Upload Cover Pages** button at the top right.
2. In the window that appears ([Figure 172](#)), click **Download** to download a template for the upload file (in XLSX format).

Figure 172. Upload Excel Window for Uploading Cover Pages



3. Edit the template in a spreadsheet application such as Excel, making sure to fill out all the columns. To find the correct values, refer to the instructions for adding a single cover page. Save.
4. **Optional:** Mark the checkbox labeled **Remove all existing coverpages from Publication before upload?**

- Click **Browse...** and select the filled-out upload file from your computer.
- At the bottom right, click **Upload**. A pop-up appears, stating how many entries were successfully uploaded and how many failed, with a list of any errors that caused failures. If necessary, click **Close**, edit your file, and upload it again.

Managing Configurations

The **Configurations** tab enables you to generate configurations for the publication. It provides information about existing validation errors that are caused due to errors in setting up the publication components, such as missing test blueprints. It also allows you to determine what components have been updated since the last generated configuration. The *Date Generated* column lists the date and time each configuration was completed.

To generate and compare configurations for your publication:

- Select the **Configurations** tab, which lists any previously generated configurations ([Figure 173](#)).

Figure 173. Publication Page: Configurations Tab

Config ID	Date Generated	Generated By	Status	Download (Excel)	Validation Log	Download Content	Compare To:
28126	6/17/2021 9:18:52 AM		Succeeded	Download	Download	Log	Choose: v
27943	6/4/2021 2:45:01 PM		Succeeded	Download	Download	Log	Choose: v
27941	6/4/2021 1:43:46 PM		Succeeded	Download	Download	Log	Choose: v
25988	3/4/2021 3:45:25 PM		Succeeded	Download	Download	Log	Choose: v
25977	3/3/2021 5:11:25 PM		Succeeded	Download	Download	Log	Choose: v
25956	3/2/2021 10:17:54 AM		Succeeded	Download	Download	Log	Choose: v
25940	3/1/2021 2:31:35 PM		Succeeded	Download	Download	Log	Choose: v
23584	11/6/2020 7:44:35 AM		Succeeded	Download	Download	Log	Choose: v
23582	11/5/2020 5:09:13 PM		Failed		Error: Transaction (Process ID 89) was deadlocked on lock communication buffer resources with another process and has been chosen as the deadlock victim. Rerun the transaction. Validation tblitembank tblTests tblContentLevels tblProficiencyLevels tblStrands tblItems tblItemLanguages tblPassages tblForms tblFormItems tblAffinityGroups tblAffinityItems tblItemProperties tblModelParameters ER_ItemSelectionParm_Table. Please contact the ITS Helpdesk if this persists.		
23465	10/27/2020 2:34:39 PM		Succeeded	Download	Download	Log	Choose: v

- Verify that no validation errors are listed. If any are listed, resolve the errors to proceed.

Figure 174. Publication Page: Configurations Tab: Validation Errors Section

Validation Errors				
Test ID	Test Name	Subject	Grade	Error
18807	ELPA21PT-ELL-PRAC-UD-ELPA-Listening_45-4	English Proficiency	4	Missing Test Blueprint attribute values. Please check that the test has all required Blueprint fields filled out properly.
18807	ELPA21PT-ELL-PRAC-UD-ELPA-Listening_45-4	English Proficiency	4	Missing Test Specification attribute values. Please check that the test has all required Test Specification fields filled out properly.

3. To generate a configuration file, do the following:

- a. *Optional:* To specify that the configuration file is a draft and should not be used for assessment purposes, mark the **Draft config** checkbox.
- b. *Optional:* To compare the configuration file with an existing configuration file, mark the **Compare to** checkbox and then select an existing config file from the dropdown list.

You can also compare configurations after a config file has been generated. Select the file that you wish to compare the config file to from the *Choose* dropdown list in the Compare To column.

- c. Click **Generate Configuration**. A configuration file is generated with a config ID key and is listed on the **Configurations** page.
 - To download the configuration file details in an Excel spreadsheet, click **Download** in the Download Excel column. A ZIP file is generated that contains the spreadsheet with information on the publication attributes (example in [Figure 175](#)).

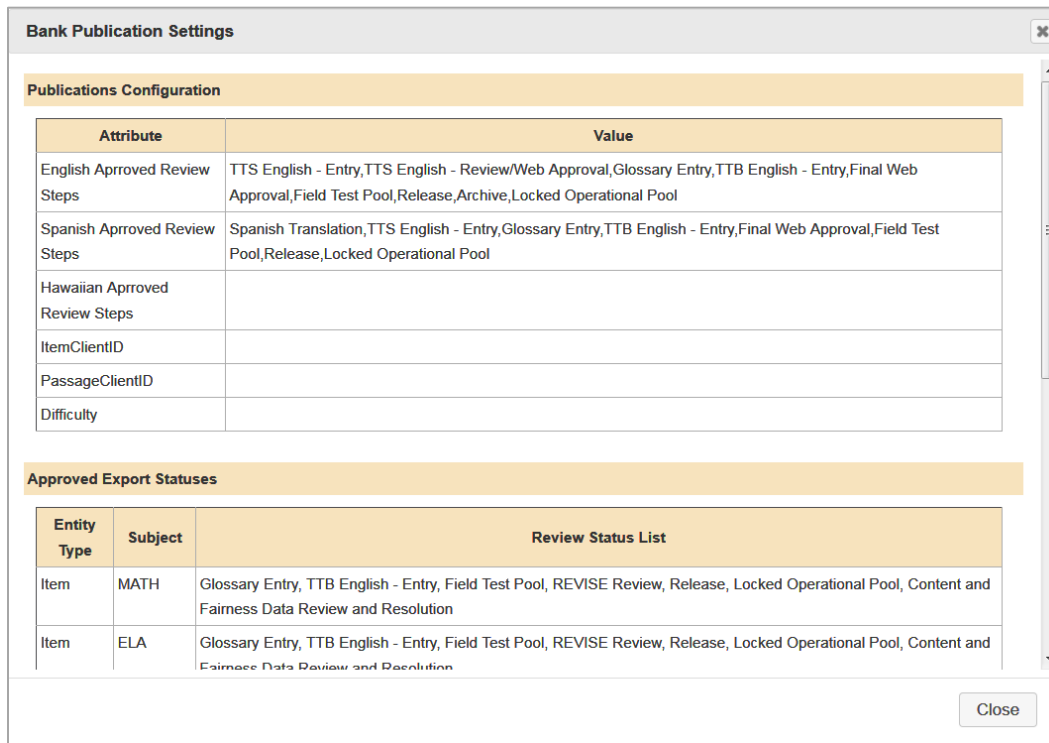
Figure 175. Sample Spreadsheet with Information on Publication Attributes

	A	B	C	D	E	F	G	H	I	J
1	BankKey	ClientNam	SchoolYea	Season	AdminStar	Comment	Publication	Contract	ConfigID	
2	10199	AIR	2018-2019	Fall	09/01/201	Common_	Not Submi	AIR	15814	
3										
4										
5										
6										
7										
8										
9										
10										
11										
12										

- To download a validation log, from the Validation Log column, click **Download**. A ZIP file is generated containing a spreadsheet that includes information about all existing validation errors.

- To download the item content, from the Download Content column, click **Content** (for the latest version of the publication content) or **Log**.
4. *Optional:* To view the item bank’s publication settings, click **Show Bank Configuration Settings**. The **Bank Publication Settings** window appears ([Figure 176](#)), displaying the configuration settings.

Figure 176. Bank Publication Settings Window

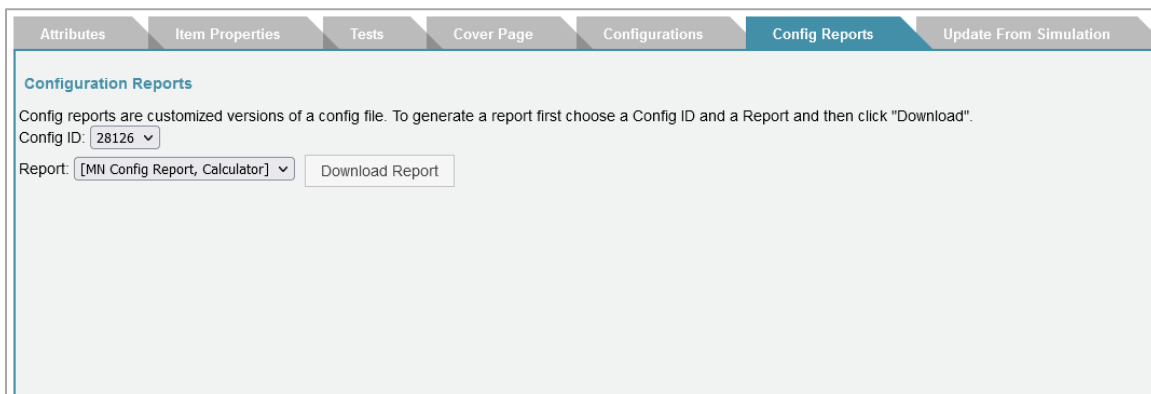


Generating Configuration Reports

The **Config Reports** tab enables you to generate configuration reports for the publication.

1. Click the **Config Reports** tab ([Figure 177](#)).

Figure 177. Publication Page: Config Reports Tab



- From the *Config ID* dropdown list, select the configuration file for which you wish to generate a report.
- From the *Report* dropdown list, select the type of report that you wish to generate. The dropdown list displays the available custom report options.
- Click **Download Report**. A ZIP file is generated containing the spreadsheet with the relevant information (sample shown in [Figure 178](#)).

Figure 178. Sample Configuration Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Subject	Grade	TestName	ItemID	ItemClient	ItemType	AnswerKey	ScorePoint	Difficulty	IsFieldTest	IsActive	StrandID	ContentLe	PassageID	SetSequen Blk
2	ELA		AIR-GEN-P	11976		IAT	IAT	1	-9999	1	1	RL	RL 3.A RL	1111	1 A
3	ELA		AIR-GEN-P	11977		IAT	IAT	1	-9999	1	1	RL	RL 3.A RL	1111	2 A
4	ELA		AIR-GEN-P	11978		IAT	IAT	1	-9999	1	1	RL	RL 3.A RL	1111	3 A
5	ELA		AIR-GEN-P	11979		IAT	IAT	1	-9999	1	1	RL	RL 3.A RL	1111	4 A
6	ELA		AIR-GEN-P	11980		IAT	IAT	1	-9999	1	1	RL	RL 3.A RL	1111	5 A
7	ELA		AIR-GEN-P	11985		IAT	IAT	1	-9999	1	1	RL	RL 3.B RL	1111	6 A
8	ELA		AIR-GEN-P	11986		IAT	IAT	1	-9999	1	1	RL	RL 3.B RL	1111	7 A
9	ELA		AIR-GEN-P	11987		IAT	IAT	1	-9999	1	1	RL	RL 3.B RL	1111	12 A
10	ELA		AIR-GEN-P	11988		IAT	IAT	1	-9999	1	1	RL	RL 3.B RL	1111	8 A
11	ELA		AIR-GEN-P	11989		IAT	IAT	1	-9999	1	1	RL	RL 3.C RL	1111	9 A
12	ELA		AIR-GEN-P	11990		IAT	IAT	1	-9999	1	1	RL	RL 3.C RL	1111	10 A

Viewing Simulation Data and Updating from Simulation

The **Update From Simulation** tab enables you to generate reports based on automated simulation results, as well as to modify your publication based on the simulation data.

To retrieve and use simulation data for your publication:

- Click the **Update From Simulation** tab ([Figure 179](#)).

Figure 179. Update From Simulation Tab

- From the *Please choose a simulation from the list* dropdown list, select an available automated simulation result.
- From the second dropdown list that appears, select a test or select **[All]** to update all tests from the selected published session. A table appears, displaying data from the simulation ([Figure 180](#)).

Figure 180. Update From Simulation Tab with Results

Update from Simulation

Please choose a simulation from the list:
 mock-up_CATG3

Choose a test from the list, or All to update all tests:
 [All]

These are the updates from the simulation that will be applied to the selected tests:

Test	Entity Type	Entity Name	Attribute Name	Current Value	New Value
Information Redacted	-MA-CAT-3-Spring-2021-2022	Test	Cset1Size	20	15
Information Redacted	-MA-CAT-3-Spring-2021-2022	Test	Cset2Random	5	3
Information Redacted	-MA-CAT-3-Spring-2021-2022	Test	abilityWeight	1	2

4. *Optional:* To modify your publication based on the simulation data, first confirm that the New Value column reflects the intended updates for the specified attribute. Then click **Apply Simulation Updates**. Any configuration file generated after this action will reflect the intended changes.

Rating Item Content

The *Content Rater* module in ITS enables you to review, assess, and rate items that exist in the item bank and that have been assigned to you. It is important to review item content to ensure that the item is written fairly and is sensitive to the student groups to whom the items are going to be administered. Hence, studies are established, and panels are set up to periodically review the data.

The *Content Rater* module consists of the following sub-modules:

- [Admin](#)
- [Rating](#)
- [Reports](#)

Admin

The *Admin* sub-module enables you to set up studies and assign batches of items to selected content raters.

Only an Item Content Validation Admin user can create, edit, and assign studies and batches of items.

- [Creating and Managing Studies](#)
- [Creating and Managing Item Batches](#)

Creating and Managing Studies

A study refers to an analysis or research of items belonging to a specific subject to ensure content fairness. An example of a study is Grade 10 Reading 2025, comprising reading items for tenth grade that will be administered to students in 2025.

To rate items, you need to create a study; create batches containing the items to be rated; and finally assign the batches in the study to the necessary content raters.

You can create a new study either by cloning an existing study or by adding a new study with a new set of questions.

- [Creating a Study](#)
- [Cloning a Study](#)
- [Editing a Study](#)
- [Assigning a Study](#)

Creating a Study

1. From the *Content Rater* menu, select **Admin**. The *Content Rater Admin* page appears.

Figure 181. Content Rater Admin Page

Content Rater Admin

Please select Study first, then Batch, then Item from Batch Items list.

Study
▾

ELA
▾

ELA (1954)

testStudy (1955)

QA_ELA (1956)

Study3172016 (1957)

BDMTestStudy (1958)

Idaho Content Fairness Meeting Study (1959)

QA-Test (1960)

QA-ELA Study (1961)

[Clone](#)

[Add](#)

[Edit](#)

[Assign](#)

Batch
▾

11293 - ELATEST811 - Traditional

11294 - TestQABatch - Traditional

11295 - Test Batch 1/24 - Traditional

[Add](#)

[Edit](#)

[Delete](#)

[Reset](#)

Batch Items
▾

Item 362

Item 363

Item 364

Item 365

Item 370

[Preview](#)

2. From the dropdown list in the *Study* panel, select the subject you wish to create a study for. All the studies that have been previously created for the selected subject appear, along with buttons for performing different actions.
4. In the *Study* panel, click **Add**. The **Edit Study Configuration** section appears.

Note that the *Subject Name* field is automatically set to the subject initially selected. To select a different subject, click **Go Back**.

Figure 182. Content Rater Admin Page: Edit Study Configuration Section

5. In the *Study Name* field, enter a name for the new study.
6. *Optional:* Mark or clear the **Display Item Overview** checkbox. This determines whether raters receive additional information on each item's properties.
7. From the *Rounds* dropdown list, select the number of rounds of questions you want to include in the study. In between rounds, discussion of item content with others may inform the way the raters respond to questions in subsequent rounds.
8. Click **Add Question**. A row for entering a question appears ([Figure 183](#)).

Figure 183. Content Rater Admin Page: Edit Study Configuration Section with Row for Entering a Question

9. Add the following information:
 - a. In the *Question Text* field, enter the question that will be presented to raters.
 - b. *Optional*: If the question is one that raters must respond to, check the **Required Response** checkbox.
 - c. *Optional*: If raters must provide a comment for the question, check the **Required Comment** checkbox.
 - d. From the *Option Types* dropdown list, specify how the response options should be displayed to the rater. For example, response options may be displayed as radio buttons; checkboxes; if **SingleSelection** or **MultiSelection** is selected, a list; or if **None** is selected, a text area.
 - e. From the *Orientation* dropdown list, if available, select whether the response options should be presented horizontally or vertically.
 - f. In the Rounds column, select the checkboxes to indicate which rounds each question should appear in. The same question may appear in multiple rounds. Every question must appear in at least one round, and every round must include at least one question.
 - g. *Optional*: To delete a question, click **Delete Question** in the Actions column.
10. Repeat steps [8](#) and [9](#) until all questions have been added.

Figure 184. Content Rater Admin Page: Edit Study Configuration Section with Question Created

The screenshot shows the 'Edit Study Configuration' page. At the top, there are fields for 'Subject Name' (ELA) and 'Study Name' (Test-Study-rg2). Below these are checkboxes for 'Display Item Overview' and a 'Rounds' dropdown set to '1'. The main section is 'Edit Rating Questions', which contains a table with the following columns: Question Text, Required Response, Required Comment, Selection Types, Orientation, Rounds, and Actions. A single row is visible with 'Sample Question' in the text field, 'Required Response' and 'Required Comment' checkboxes unchecked, 'Selection Types' set to 'RadioButton', 'Orientation' set to 'Vertical', 'Rounds' set to 'All Rounds' (with 'Round 1' checked), and 'Actions' containing 'Edit Options' and 'Delete Question' buttons. Below the table are 'Add Question', 'Save', 'Lock', and 'Go Back' buttons.

Question Text	Required Response	Required Comment	Selection Types	Orientation	Rounds	Actions
Sample Question	<input type="checkbox"/>	<input type="checkbox"/>	RadioButton	Vertical	All Rounds Round 1 <input checked="" type="checkbox"/>	Edit Options Delete Question

11. Create response options for each question that requires them by doing the following:
 - a. Click **Edit Options** for a question. The *Options* window appears ([Figure 185](#)).
 - b. Click **Add Option**. A row for adding an option appears.

- c. In the *Option Text* field, enter a response option.
- d. *Optional*: If the rater needs to provide a comment when selecting the option, check the **Required Comment** checkbox.

Figure 185. Options Window

Option Text	Require Comment	Actions

Add Option

- e. Click **Add Option** again and proceed to create more response options in the manner described above.
- f. *Optional*: To delete an option, click the **Delete Option** button in the Actions column.
- g. Once all the response options have been created, close the window.



Note: For some option types, such as radio buttons, you may also create sub-options. For option types that allow sub-options, **Edit Suboptions** buttons are displayed in the Actions column of the **Options** window.

Option Text	Require Comment	Actions
Option 1	<input type="checkbox"/>	Edit Suboptions Delete Option
Option 2	<input type="checkbox"/>	Edit Suboptions Delete Option

Add Option

To create sub-options:

- 1) Click **Edit Suboptions** for the required option. A **Suboptions** window appears.
- 2) In the **Suboptions** pop-up window, click **Add Suboption** to add a sub-option row and then enter the sub-option description in the *Suboption Text* field.
- 3) Repeat the above step until all sub-options have been added.
- 4) *Optional*: To delete a sub-option, click the **Delete Suboption** button in the Actions column.
- 5) Close the pop-up window and return to the **Options** window.

12. To lock the study, click **Lock**, enter a comment in the pop-up, and click **OK**. The study must be locked before it can be assigned to content raters. A locked study cannot be edited. To unlock it, click **Unlock**, enter a comment, and click **OK**. When a study is assigned, it can no longer be unlocked unless the raters and any rating data are removed.
13. Click **Go Back** to return to the **Content Rater Admin** page and perform other actions.

Cloning a Study

1. From the *Content Rater* menu, select *Admin*. The **Content Rater Admin** page appears.
2. From the dropdown list in the **Study** panel, select the subject for which you wish to create a study. All the studies that have been previously created for the selected subject appear, along with buttons for performing different actions.
3. From the **Study** panel, click **Clone**. The **Clone/Copy Study** page appears.

Figure 186. Content Rater Admin Page: Clone/Copy Study Section

Content Rater Admin Content Rater Setting

Clone/Copy Study

Step 1: Copy rating questions from an existing Study:

Copy Study in Subject: Copy from Study:

Step 2: Select a subject for new Study and input Study name:

New Study in Subject:

New Study Name:

4. From the *Copy Study in Subject* dropdown list, select the subject from which you wish to clone the study. A list of studies existing for the selected subject appears.
5. From the list of existing studies, select the study that you wish to clone.

Figure 187. Content Rater Admin Page: Clone/Copy Study Section: Step 1

Step 1: Copy rating questions from an existing Study:

Copy Study in Subject: Copy from Study:

- QA Ni 2/3_C1 (3582)
- QA Ni 2/3_study2 (3583)
- QA Ni 2/3_c2 (3584)
- QARegression2/4 (3585)
- qacionereg2/4 (3586)
- qatesting2/6 (3588)
- rgatwood-Study1 (3593)**
- rg-Study2 (3594)

- Next, from the *New Study in Subject* dropdown list, select the subject to which you wish to clone the study.
- In the *New Study Name* field, enter a name for the new study being created.
- Click **Save**. A message appears, indicating that the study has been successfully added.
- Click **OK** to return to the *Clone/Copy Study* page.
- Optional:* You can verify that the new study has been added to the list of existing studies by selecting the subject for which the study was created from the *Copy Study in Subject* dropdown list. The ID of the new study is displayed in parentheses.
- Click **Go Back** to return to the *Content Rater Admin* page and perform other actions.

Editing a Study

You can edit an unlocked study if necessary.

- From the dropdown list in the **Study** panel of the *Content Rater Admin* page ([Figure 181](#)), select the subject with which the study you wish to edit is associated. All the studies that have been previously created for the selected subject appear, along with buttons for performing different actions. To filter the list, type a partial study name in the search field.
- Select a study and click **Edit**. The *Edit Study Configuration* section appears ([Figure 188](#)).

Figure 188. Content Rater Admin Page: Edit Study Configuration Section

Edit Study Configuration

Subject Name:

Study Name:

Display Item Overview:

Rounds:

Edit Rating Questions:

Question Text	Required Response	Required Comment	Selection Types	Orientation	Rounds	Actions
Sample Question	<input type="checkbox"/>	<input type="checkbox"/>	None		All Rounds Round 1 <input checked="" type="checkbox"/>	Delete Question

3. Make updates as necessary.
4. To edit the response options created for a question, click **Edit Options**. The **Options** window appears, allowing you to edit the option description or comment requirements. Close the window.
 - If a response option consists of sub-options, you can edit the sub-options by clicking **Edit Suboptions** in the **Options** window. In the **Suboptions** window that appears, edit the sub-option text and then close the window.
5. Click **Save** in the *Edit Study Configuration* section to save your updates. A message appears, confirming that the study has been successfully updated. Click **OK**.
6. To lock the study, click **Lock**, enter a comment in the pop-up, and click **OK**. The study must be locked before it can be assigned to content raters. A locked study cannot be edited. To unlock it, click **Unlock**, enter a comment, and click **OK**. When a study is assigned, it can no longer be unlocked unless the raters and any rating data are removed.
6. Click **Go Back** at the bottom left to return to the main **Content Rater Admin** page and perform other actions.

Assigning a Study

Once a study has been created, you can assign the study to content raters for rating. A study can be assigned to an unlimited number of raters.

A study must include batches of items that need to be rated. While you may assign a study that does not include any batches to a content rater, the content rater will not be able to start rating until a batch of items is assigned to them. For information on how to create batches, refer to [Creating and Managing Item Batches](#).

When a study is assigned, it can no longer be unlocked unless the raters and any rating data are removed.

1. From the dropdown list in the Study panel of the **Content Rater Admin** page ([Figure 181](#)), select the subject with which the study you wish to assign is associated. All the studies that have been previously created for the selected subject appear, along with buttons for performing different actions. To filter the list, type a partial study name in the search field.
2. Select the study and click **Assign**. The *Please select a Rater* section appears.

Figure 189. Content Rater Admin Page: Please Select a Rater Section

Content Rater Admin Content Rater Settings

Please select a Rater, add or remove incompleted batches of Study (ID: 3594) and click on Save button. (The completed batches can not be changed.)**

Subject Name:
ELA

Study Name:
rg-Study2

- Please select a Rater -

Completed Batches:

Assigned Incompleted Batches:

Available Incompleted Batches:

>> <<

Save Cancel

Go Back

- From the dropdown list, select a rater. The incomplete batches that have yet to be assigned to the user are listed in the *Available Incompleted Batches* section.



Alert: Only an Item Content Validation Rater user can rate items. Please ensure that you have assigned the batch to the appropriate user.

- From the *Available Incompleted Batches* list on the right, select the batches you want to assign. You can select multiple batches simultaneously using the **Ctrl** or **Shift** key.
- Click << to move the selected batches to the *Assigned Incompleted Batches* list on the left. You can also unassign batches using >>.

Figure 190. Detail of Content Rater Admin Page: Please Select a Rater Section: Batch Lists

Assigned Incompleted Batches:

Available Incompleted Batches:

22067 - rgatwood-Batch1

>> <<

6. Click **Save**. A message appears, confirming that the batches have been assigned successfully. If the user is a content rater, the batches will be displayed to them when they access the *Rater* sub-module.
7. Click **OK** and then click **Go Back** to return to the main ***Content Rater Admin*** page.

Creating and Managing Item Batches

A batch is a collection of items that need to be rated. Once a batch has been created, you can assign the batch to content raters. A batch can be assigned to an unlimited number of raters. A rater can also be assigned multiple batches within the same study. Note that stimuli are not collected in batches. Only items are collected in batches.

This section explains the following:

- [Creating a Batch](#)
- [Previewing a Batch](#)
- [Deleting a Batch](#)

Creating a Batch

A study may consist of multiple batches. Each traditional batch in a study must contain different items, but contract-specific batches can share items. If a study consists of a large number of items, it can be useful to separate them into batches and assign them to different content raters.

To create a batch, you must first create a text file listing the IDs of all the items constituting the batch. The item IDs must be listed in separate lines and must belong to the subject for which the study has been created. For example, a batch created for a Reading study must contain items created for Reading.

1. From the dropdown list in the **Study** panel of the ***Content Rater Admin*** page ([Figure 181](#)), select the subject associated with the study for which you want to create a batch. All the studies that have been previously created for the selected subject appear, along with buttons for performing different actions.
2. Select the subject you wish to create a batch for from the list. Batches that have already been created for the study are listed in the *Batch* panel.
3. Click **Add** in the *Batch* section. The *Add Batch* section appears ([Figure 191](#)).

Figure 191. Content Rater Admin Page: Add Batch Section

4. In the *Title* field, enter a name for the batch.
5. Select a batch type from the dropdown list.
 - A traditional batch's items cannot overlap with those of other traditional batches. If you try to create a traditional batch consisting of items included in another traditional batch of the same study, an error is generated.
 - A contract-specific batch's items can overlap, however. If an item belongs to more than one contract-specific batch, it can only be rated in one of those batches.

Note that if you select **ContractSpecific**, the **Only Rate Repeated Item** checkbox appears. Mark this checkbox to prevent the same item from being rated more than once in different batches.

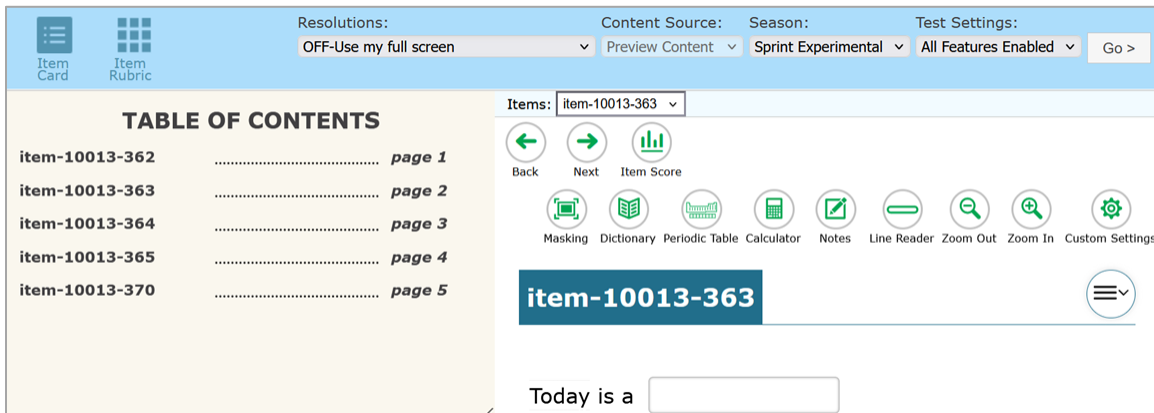
6. From the *View Rater Responses* options, select **Yes** or **No**. This setting determines whether a rater can view the responses of another rater.
7. Click **Browse** next to the *Item ID file* field. Select the required text file containing the IDs of the items constituting the batch and click **Open**. The path of the selected file is displayed in the *Item ID file* field.
8. Click **Save**. A message appears, confirming that the batch has been created successfully.
9. Click **OK** and then click **Go Back** to return to the main **Content Rater Admin** page. The batch is displayed in the *Batch* section with the batch ID in parentheses. If you select the batch, the items constituting the batch are displayed in the *Batch Items* section.

Previewing a Batch

On the main **Content Rater Admin** page, select a batch from the *Batch* section, then select the **Preview** button in the *Batch Items* section. A preview opens in a new browser tab or window. On the left, a table of contents lists all the items in the batch (including any associated stimuli).

You can navigate between items and/or stimuli using either the **Back** and **Next** buttons or the *Items* dropdown list.

Figure 192. Detail of Batch Preview Page



Deleting a Batch

You can delete batches if necessary.

1. Select the batch you wish to delete from the *Batch* section.
2. Click **Delete**. A confirmation message appears.
3. Click **OK**. The batch is deleted from the study.

If the batch you deleted was assigned to a rater, the deleted batch is automatically removed from the rater's assignment list.

Rating

The *Rating* sub-module enables you to rate the batches of items that have been assigned to you.

Items can only be rated by an Item Content Validation Rater user to whom the batches have been assigned.

You can view the number of batches that have been assigned to you from the *Rating* page.

1. From the *Content Rater* menu, select **Rating**. A form for entering content rater information appears. Some fields are required. This helps to identify who has rated the items in case of content raters who use a generic user ID to log in to ITS and rate items, and some reports show this information.
2. If the form does not contain your correct information, fill it out and click **Save**. Your information is saved and may be viewed and edited by the next content rater who uses this login.

A section appears, displaying the batches that have been assigned to you, the items constituting each batch, associated stimuli, and any comments that you may have entered for the items.

Figure 193. Incomplete Batches Section

Incomplete Batches

Study (3113) rg-study9

Batch: rg-batch7 (ID: 15769 - Type: Traditional) -

Item ID	Status	Stimulus	Comment
18027	Incomplete	981: Argentina Sea Lions	
18088	Incomplete		
17831	Incomplete		
3100	Incomplete	663: Liopleurodon in England	
18267	Incomplete		
18374	Incomplete		
18492	Incomplete	1114: 4-ESS2-2 Earthquakes and Volcanoes in Indonesia	

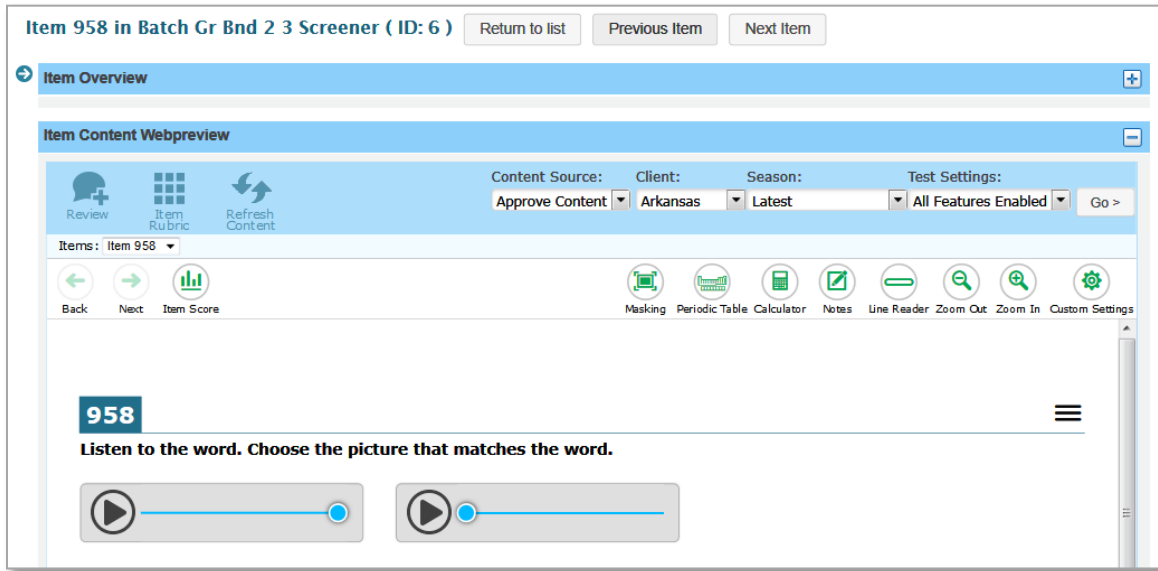
Study (3114) rg-study10

Batch: rg-batch8 (ID: 15770 - Type: Traditional) -

Item ID	Status	Stimulus	Comment
19188	Incomplete	1320: rgatwood-stim	
19167	Incomplete		
19105	Incomplete		
19104	Incomplete		
18536	Incomplete		

- To rate the items constituting a batch, click **Start** or **Start Round** for the batch you wish to rate. This opens the first item in the batch for a round of review. Alternatively, you can also select the item you wish to review by clicking the item ID. The item content is displayed in web preview mode as in [Figure 194](#).

Figure 194. Item Content Rater Page




4. Do the following:
 - a. To view the item attributes and standards alignments, expand the **Item Overview** panel.
 - b. To rate the item, click  to open the *Item Rating Questions* panel.
 - Answer the questions. If a question has already been answered in one or more rounds, the toggle at the top of the panel allows you to retain or edit the answers from the previous round, as shown in [Figure 195](#).

Figure 195. Item Content Rater Page: Item Rating Questions Panel

- c. To proceed to the next item in the batch, click **Next Item**.
 - d. To return to the previous item, click **Previous Item**.
 - e. To return to the table of batches, click **Return to List**.
5. Click **Save** if you have completed the review and you are satisfied with your selections.



Note: To clear or revert your selections, click the **Reset** button at the bottom of the page. If a question has already been answered in one or more rounds, the answer reverts to that which was saved in the last round. If you have already clicked **Save**, clicking the **Reset** button will return you to your latest saved selections.

6. Check the item list on the **Incomplete Batches** page to verify that all items for the selected batch have the status of Complete for this round. If any of the items have a status of Incomplete, select the item and finish reviewing the item.
7. Click **Submit** or **Submit Round** to submit the batch for this round.

If the study contains multiple rounds, you can repeat this process to complete each round. Note that once you submit the final round of a batch, you will no longer be able to access it. You can

still view completed batches by clicking **Show Completed Batches** on the *Incomplete Batches* page, but you cannot open them for review.

Reports

The *Reports* sub-module enables you to generate different reports for the items that have been rated.

Note that only an Item Content Validation Admin user or an Item Content Validation Report user can generate reports of item ratings.

To generate reports:

1. From the *Content Rater* menu, select **Reports**. The *Content Rater Report* page appears ([Figure 196](#)).

Figure 196. Content Rater Report Page

The screenshot shows the 'Content Rater Report' interface. It features three main sections: 'Report', 'Study', and 'Batch'. The 'Report' section has a dropdown menu currently set to 'Generate Acceptance Rate Report'. The 'Study' section has a dropdown menu set to 'ELA' and a scrollable list of studies, with 'ELA (1954)' selected. The 'Batch' section has a scrollable list of batches, with '11293 - ELATEST811 - Traditional' selected. A 'Generate Content Rater Report' button is located at the bottom of the page.

2. From the dropdown list in the *Report* panel, select the report you wish to generate. For more information, refer to [Content Rater Report Types](#).
3. For most report types, you need to select a study. From the *Study* panel, select the subject associated with the study you wish to generate a report for. The list of existing studies appears.

Select the study for which you wish to generate a report. The batches that make up the study display below.

4. For most report types, you need to select at least one batch from the *Batch* panel. Selections appear on the right under *Selected Batches*, as in [Figure 196](#). To remove a selection, click **X** beside it.
5. Click **Generate Content Rater Report**. The report downloads or displays.

Content Rater Report Types

The *Reports* sub-module enables you to generate several types of reports.

Acceptance Rate Report

This Excel report (sample shown in [Figure 197](#)) provides percentages representing the way raters responded to item options and suboptions. To generate this report, you need to select a study and batch.

Figure 197. Sample Acceptance Rate Report

	A	B	C	D	E	F
1	Acceptance Rate Report					
2	Study					
3	QAstudy10/14					
4	Batch					
5	tr10/14					
6	Question 1 - what is the value of 5+4					
7	ID	9	12	15	Yes(SubOption for 9	No(SubOption
8	3768	50%	50%	0%	0%	50%
9	3780	0%	50%	50%	0%	0%
10	3782	50%	50%	0%	50%	0%
11						
12	Batch					
13	cr yes 10/14					

1992-Generate Acceptance Rate R

Extract Latest Rating Versions

This Excel report (sample shown in [Figure 198](#)) provides information about the last ratings of all the items constituting a batch.

Figure 198. Sample Latest Rating Versions Report

1	Seq	Item: ITS ID	UserID	User Account	RaterID	Rater First	Rater Last	Rate	Rat	BatchID	BatchTitle	Ver	RatingTime	CumRatingTime	QuestionText:6	QuestionID	SelectedResp	ReviewerCommer
2	1	1664	3280	Paula_Mahaley						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:17		Reviewer ID (rec6			ID7
3	2	1664	3282	Margaret_Ho						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:26		Reviewer ID (rec6			mho
4	3	1664	3290	Brooke_David						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:49		Reviewer ID (rec6			David
5	4	1664	3292	Patty_Carroll						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:12		Reviewer ID (rec6			PC
6	5	1666	3280	Paula_Mahaley						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:45		Reviewer ID (rec6			ID7
7	6	1666	3282	Margaret_Ho						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:43		Reviewer ID (rec6			mho
8	7	1666	3290	Brooke_David						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:31		Reviewer ID (rec6			David
9	8	1666	3292	Patty_Carroll						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:15		Reviewer ID (rec6			PC
10	9	1668	3280	Paula_Mahaley						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:43		Reviewer ID (rec6			ID7
11	10	1668	3282	Margaret_Ho						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:17		Reviewer ID (rec6			mho
12	11	1668	3290	Brooke_David						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:69		Reviewer ID (rec6			David
13	12	1668	3292	Patty_Carroll						7	Gr Bnd 4 5 Sr 1		2019-02-22 01:16		Reviewer ID (rec6			PC

Extract All Rating Versions

This report is similar to Latest Rating Versions (refer to [Extract Latest Rating Versions](#)) but provides information about all the ratings of all the items constituting the batch.

Batch Completion Summary Report

This report (sample shown in [Figure 199](#)) provides a summary of item ratings for a completed batch. When you click **Generate Content Rater Report**, the report appears on the page. You can click **Export to Excel** to export the report to an Excel spreadsheet.

Figure 199. Sample Batch Completion Summary Report

Batch Completion Summary Report										Export to Excel
Study: Screener TFP review (8)										
Batch(es): 7 - Gr Bnd 4 5 Screener										
** Please click on Item ID at summary table body to view the rating details from the user.										
Item ID	Batch ID	Batch Title	User Account	Rater FirstName	Rater LastName	Rater Company	Rater LoginComments	Rating Result	General Comments	
1664	7	Gr Bnd 4 5 Screener	Margaret_Ho						Need to zoom in to see print in timeline boxes. Once question is asked, can student replay passage?	
1664	7	Gr Bnd 4 5 Screener	Margaret_Ho						Need to zoom in to see print in timeline boxes. Once question is asked, can student replay passage?	
1664	7	Gr Bnd 4 5 Screener	Margaret_Ho						Need to zoom in to see print in timeline boxes. Once question is asked, can student replay passage?	
1664	7	Gr Bnd 4 5 Screener	Paula_Mahaley					Yes		
1664	7	Gr Bnd 4 5 Screener	Margaret_Ho					Yes	Need to zoom in to see print in timeline boxes. Once question is asked, can student replay passage?	
1664	7	Gr Bnd 4 5 Screener	Patty_Carroll					Yes		
1664	7	Gr Bnd 4 5 Screener	Brooke_David					Yes		
1664	7	Gr Bnd 4 5 Screener	Brooke_David					Accepted		
1664	7	Gr Bnd 4 5 Screener	Patty_Carroll					Accepted		
1664	7	Gr Bnd 4 5 Screener	Margaret_Ho					Accepted	Need to zoom in to see print in timeline boxes. Once question is asked, can student replay passage?	
1664	7	Gr Bnd 4 5 Screener	Paula_Mahaley					Accepted		
1666	7	Gr Bnd 4 5 Screener	Margaret_Ho						same comments as for previous item	

Study Analysis Report

This report (sample shown in [Figure 200](#)) provides a comprehensive summary of how items have been rated and the number of raters who have rated the items. Unlike the [Acceptance Rate Report](#), it includes rater comments. To generate this report, you need to select the study and batch. The report is downloaded as an Excel file and can be viewed using any spreadsheet software.

Figure 200. Sample Study Analysis Report

	A	B	C	D	E	F	G	H	
1	Item Content Validation Study Report								
2	STUDY								
3	Screener TFP review								
4	Batch								
5	Gr Band 6 8 Screener								
6	Item	No. of Raters							
7	2380- (We Need a School Newspaper)	5							
8	Question								
9	Reviewer ID (required):								
10									
11	Question								
12	Task Type Name:								
13									
14	Question					Yes	No		
15	Order appears correct (required):					100%			
16									
17	Question					Accepted	Needs Revis		
18	After review, this form is (required):					100%			
19									
20	Question								
21	If you chose "Needs Revised" above, please describe suggested edits in Comment box:								
22									
23									
24									
25	Comments Item:2380								
	Generate Study Analysis Report								

User Batch Assignment Report

This Excel report lists the content raters who have been assigned a particular batch.

Participant Demographic Report

This Excel report lists all the content raters for the entire bank. It includes the demographic information they filled out before entering their ratings.

Generating ITS Reports and Performing Other Actions

You can perform various actions, including generating reports, using the **Action Center**, **Item Inventory**, and **Stimulus Inventory** links that appear when you hover over the *Report* menu in the banner.

Note that the **Actions** panel in the Action Center also appears on the **View\Edit** page of an item or stimulus and in item and stimulus search results.

The available links in the *Report* menu are as follows:

- [Action Center](#)
- [Item Inventory](#)
- [Stimulus Inventory](#)

Action Center

The Action Center sub-module enables you to perform different actions, such as web-preview items and stimuli; create packages containing item and stimulus content and rubric information; generate screenshots of how an item will be presented in the Test Delivery System (TDS); create reports containing item metadata; share or clone entities across banks; and submit mass revise requests. Access to the Action Center and the actions that you can perform depend on your user role.

To perform actions from the Action Center:

1. From the *Report* menu in the banner, select **Action Center**. The **Action Center** page appears ([Figure 201](#)).

Figure 201. Action Center Page

2. From the *Input Type* options, specify whether you wish to upload a file consisting of the IDs of the items or stimuli you want to work with; use a preexisting configuration file; generate reports for the entire bank, a workspace, or a publication; or generate an Item Alignment Crosswalk report.

- To upload a file:
 - i. From the *Input Type* options, click **Upload File**.
 - ii. From the *Entity Type* options, select the entity type of the IDs included in the file. The file must contain IDs of either items or stimuli, but not both.
 - iii. Click **Browse**. A window to your computer appears.
 - iv. Select the TXT file you want to upload from your computer and click **Open**. The uploaded file name is displayed next to the button.
- To select a preexisting configuration:
 - i. From the *Input Type* options, click **Select Config**.

Figure 202. Action Center Page

The screenshot shows the 'Action Center' interface. On the left is a navigation menu with options: View, Share/Clone to Other Bank, Reports, Admin, and Form. The main content area has a header: 'Would you like to upload a file or select from a configuration?'. Below this, the 'Input Type' section has three radio buttons: 'Upload File', 'Select Config' (which is selected), 'Bank', and 'Workspace'. Below that, the 'Select a Config File and Test' section is active, showing a 'Select Config ID:' dropdown menu. The dropdown list contains the following entries:

Select Config ID	Config Name	Timestamp
19995	Platform Review Batch 25 - PT_Auto_approval_Test	Jun 19 2022 8:51AM
19994	Platform Review Batch 24 - PR_AutoApprovalTest	Jun 17 2022 9:41PM
19993	Platform Review Batch 23 - PR_Test_BatchApproval	Jun 17 2022 6:07PM
19992	Platform Review Batch 22 - PR_Test_AutoBatchApproval	Jun 17 2022 4:51PM
19472	Math Cluster Training	Nov 2 2021 10:29AM

- ii. From the *Select Config ID* dropdown list, select the configuration file.
 - iii. From the *Pick Test(s)* dropdown list, select the test. You can select one or more tests simultaneously. You can also select **All Tests** to select all the tests included in the configuration file.
 - iv. From the *Pick a form* dropdown list, if available, select the form. You can only select one form at a time.
- To generate reports for the entire bank, select **Bank** from the *Input Type* field.
 - To generate reports for a workspace:
 - i. From the *Input Type* options, select **Workspace**. The *Select a Workspace* section appears, as in [Figure 203](#).
 - ii. Select a workspace.

- iii. Select the workspace entity type.

Figure 203. Action Center Page: Select a Workspace Section

- To generate an Item Alignment Crosswalk report, you must select **Customized Input File**. For more information, refer to [Print an Item Alignment Crosswalk \(Excel\) Report](#).
- To generate reports for a publication:
 - i. From the *Input Type* options, select **Publications**.
 - ii. Select a publication. More controls appear below, as in [Figure 204](#).
 - iii. Make additional selections as you would for a config.

Figure 204. Action Center Page: Select a Config File and Test Section

3. From the **Actions** panel, select the action. Below are detailed descriptions of the actions that you can perform.

Based on the nature of the actions, the Action Center action items are organized into groups. You can click on each group to view the action items available for each group. The different groups are as follows:

- [View](#)
- [Content](#)
- [Share/Clone to Other Bank](#)

- **Reports:**
 - [Generate Report](#)
 - [On Demand Screenshot](#)
 - [Custom Report](#)
- **Requests:**
 - [Mass Revise Request](#)

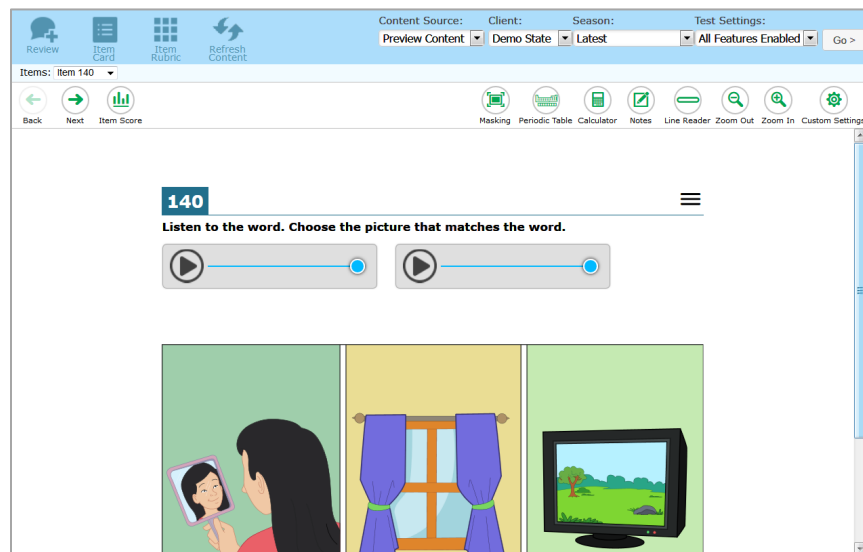
View

Under **View**, there are multiple action types:

- **Web Preview Latest Content** allows you to view the latest version of the selected items along with their stimuli as they would appear in the Test Delivery System (TDS). When you click **Web Preview Latest Content**, a new browser tab or window opens with the first item on display, as in [Figure 205](#).

This action type displays the latest version existing for an item that may not have been approved; to view an item's approved content, select **Web Preview Approved Content** instead.

Figure 205. Item Web Preview



- **Web Preview Approved Content** allows you to view the last approved content of the selected items along with their stimuli as they would appear in the TDS. When you click **Web Preview Approved Content**, a new browser tab or window opens with the first item that has approved content on display.

Note that the item may have a later version that has not yet been approved. To view an item's latest content, select **Web Preview Latest Content** instead.

- **Paper Preview Latest Content** works the same way as **Web Preview Latest Content**, but opens a PDF of the content as it would appear to a student taking a paper test.
- **Paper Preview Approved Content** works the same way as **Web Preview Approved Content**, but opens a PDF of the content as it would appear to a student taking a paper test.
- **IAT Documentation Review** gives you read-only access to the IAT documentation for items or stimuli. This is the same documentation found on the **View\Edit** page of an item or stimulus, as described in [IAT Documentation](#). However, the Action Center allows you to access multiple documents with fewer clicks. You can use the **IAT Documentation Review** option from an item or stimulus's **View\Edit** page to access that entity's IAT documentation. Alternatively, you can start by uploading a list of items or stimuli to access their IAT documentation together.

First, in the **Select Document Type** window that appears, select all the types of documentation you want to view. Select **OK**. Then, in the new browser tab or window that appears, use the dropdown list or the **Previous** and **Next** buttons to navigate through each piece of documentation.

Figure 206. Select Document Type Window

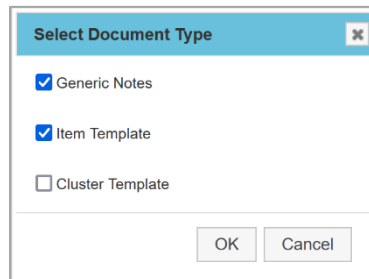
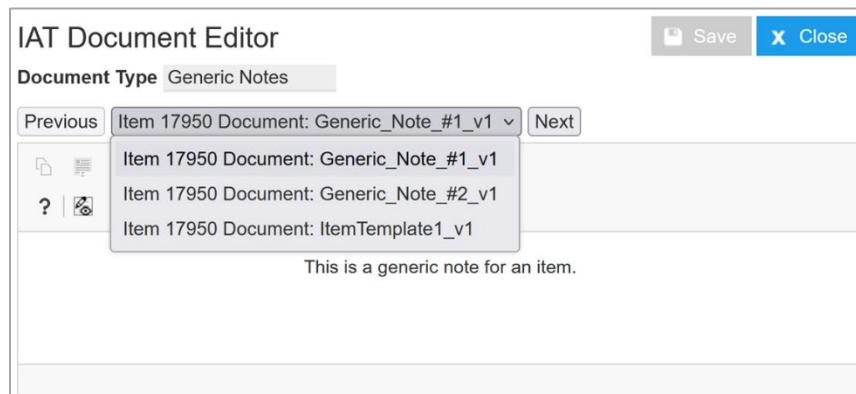


Figure 207. IAT Document Editor Page (Read-Only)



When viewing a preview, you can use the tools on the page to zoom in and out, change the display, and view the item in a different language (if applicable), to verify how the item will appear to the student. You can also navigate through the different items included in the file, view the item card, view the rubric, and review the item if applicable.

Content

Under **Content** are various action types, such as the following:

- **Approved Package:** This action type allows you to upload a package of all the item content, associated stimulus content (if applicable), rubric, metadata, and audio and video files for items that have been web-approved in the new ITS web preview format to the Amazon Web Services (AWS) server (a TDS server). A log file listing the item IDs included in the file is also provided.

When you click **Approved Package**, a pop-up appears, indicating that the content is being downloaded. Once completed, you can view the content in TDS.

- **Legacy Approved Package:** This action type is only available to the Content Debugging user role. It allows you to upload a ZIP file to AWS containing all the legacy item content, associated stimulus content (if applicable), rubric, metadata, and audio and video files for items that have been web-approved in a format applicable to the earlier web preview version used in ITS.
- **Approved Recon Package:** If you have the Administrator Level 0 user role, this action uploads a package of the same content as **Approved Package** to the AWS server. You can choose from available AWS locations, then click **Export Package**.

If you have the Content Debugging role, you can use this action to download an unencrypted package.

- **Latest Recon Package:** Downloads a package similar to **Approved Package**, except that the content represents the latest edited version.

Only the Content Debugging role can download an unencrypted package.

Share/Clone to Other Bank

This action type allows you to share or clone selected items and stimuli across banks. You can share them with or clone them to a different item bank that shares a centralized database with the source bank, as long as sharing or cloning is enabled between the banks. Note that not all item banks are configured to allow cloning of items or stimuli.


You can also clone items and stimuli within an item bank, as described in [Cloning an Item or Stimulus Within an Item Bank](#).

To prevent sharing issues across banks, the following sharing rules have been implemented:

- Content can only be shared between item banks that are on the same centralized database. Content cannot be shared within an item bank itself. However, you can clone items and stimuli within an item bank, as described in [Cloning an Item or Stimulus Within an Item Bank](#).
- Entities can only be shared from the original bank where the entity was created. (A shared or cloned entity can be cloned from the destination bank, however.)
- A shared entity's content can be edited only in the source bank. The shared entities can be viewed in the destination banks.
- A shared entity's attribute values, including CSRs, can be edited in the destination bank. However, item-item and item-stimulus associations cannot be edited in the destination bank.


Note also that a stimulus cannot be shared or cloned by itself across item banks. The items with which the stimulus is associated must be shared or cloned as well. Likewise, an item associated with a stimulus can only be shared or cloned across banks together with that stimulus.

In the source and destination banks, the **View\Edit** page shows information on an entity's sharing or cloning:

- When you view a shared item or stimulus in the source bank, the  icon is displayed on the right.
- When a shared item or stimulus is currently undergoing platform review, the Platform Review swim lane in the **Content Files** panel displays the bank key, batch key, batch name, and batch status of the review. This information displays in the swim lane in multiple banks:
 - A destination bank, when the entity is in a source bank batch
 - A source bank, when the entity is in a destination bank batch
 - A destination bank, when the entity is in a batch in a different destination bank and shares the same source

This Platform Review swim lane information disappears when the batch is either completed or abandoned.

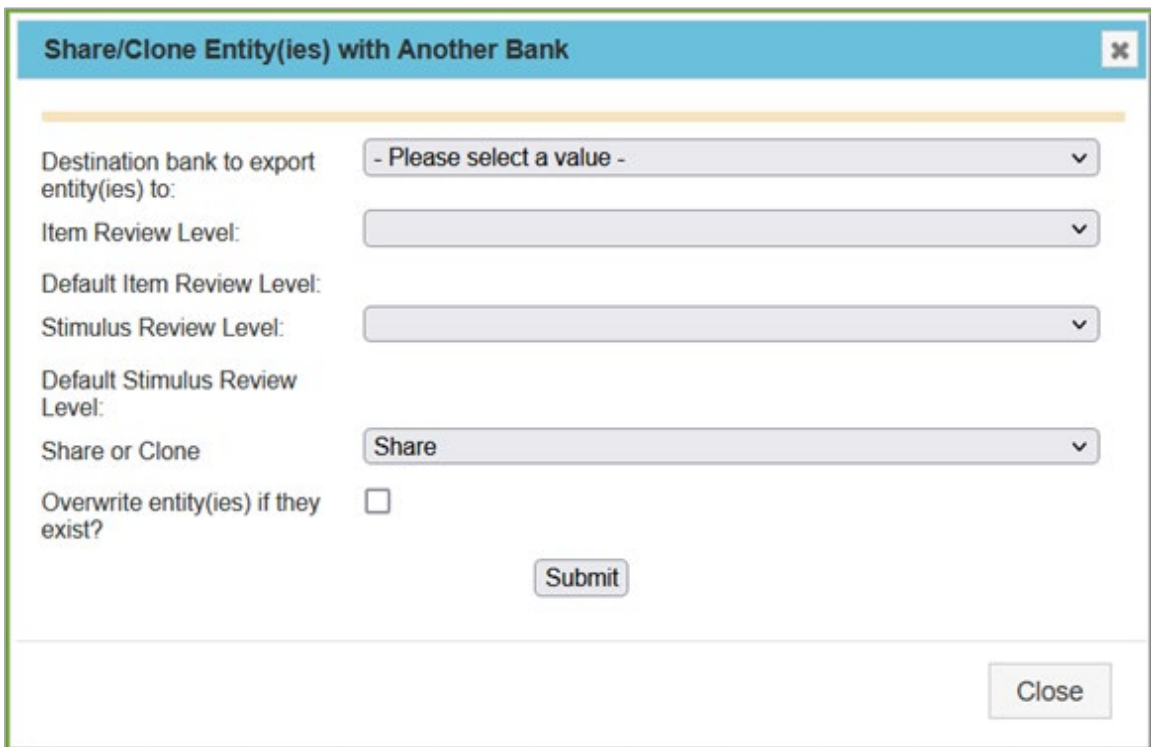
- In the source bank for a shared or cloned item or stimulus, the **Content Attributes and Shared Item Information** panel (or **Content Attributes and Shared Stimulus Information** panel) lists information on the sharing or cloning destination banks.

- When you view a shared item or stimulus in the destination bank, the  icon is displayed on the right.
- In the destination bank for a shared item or stimulus, the **Content Files** panel also includes sharing information in the form of two buttons below the review lanes:
 - **View Source Status** opens a window displaying the lanes for the original item or stimulus.
 - **View Source Content History** opens a window displaying the original item or stimulus's version history.

To share or clone an item across banks:

1. Verify that the item being shared or cloned and its associated entities, such as tutorials, stimulus, and/or cover page, have content.
2. From the *Actions* menu on the left, select **Share/Clone to Other Bank**. The **Share/Clone Entity(ies) with Another Bank** window appears ([Figure 208](#)).

Figure 208. Share/Clone Entity(ies) with Another Bank Window



Share/Clone Entity(ies) with Another Bank [X]

Destination bank to export entity(ies) to: - Please select a value -

Item Review Level: [v]

Default Item Review Level: [v]

Stimulus Review Level: [v]

Default Stimulus Review Level: [v]

Share or Clone: Share [v]

Overwrite entity(ies) if they exist?

Submit

Close

3. Choose from the available options:

- a. **Destination bank to export entity(ies) to:** Indicates the bank with which you wish to share or clone the entity. The dropdown list displays the banks on the centralized database that you have access to.
 - b. **Item Review Level:** Indicates the review level the item should be at in the destination bank. Note that not all statuses are available in the destination bank; for example, you cannot select an unsubmitted status or a rejected status.
 - c. **Stimulus Review Level:** Indicates the review level the associated stimulus should be at in the destination bank. Again, note that not all statuses are available.
 - d. **Share or Clone:** Indicates which action you want to perform.
 - e. **Overwrite entity(ies) if they exist:** Indicates whether you wish to update the existing content in the destination bank for an item that has been previously shared with or cloned to the selected destination bank. To overwrite the existing content in the destination bank, mark the checkbox.
4. Click **Submit**. A log file downloads and a message appears in the **Share/Clone Entity(ies) with Another Bank** window, indicating whether the items were successfully shared or cloned. Click **Close**.

Generate Report

This action type allows you to generate different types of reports, such as Summary Reports, Item Use History, Custom PDF Reports, and Key Files. The format in which the selected report is generated (for example, Excel [XLSX], PDF, or ZIP) is displayed in parentheses next to the name of the report. Since formats are customized according to client specifications, they may differ from one item bank to another.



Note: Some special reports, known as Alt reports, are available for paper-based alternate assessment banks.

- If you are generating these reports from the Action Center sub-module, these report options are only listed if you set the *Input Type* on the **Action Center** page ([Figure 201](#)) to **Upload File** and upload a file of the item IDs or stimulus IDs to be included on the report.
- If you are generating the reports from the *Item*, *Stimulus*, and *Review* modules (such as from the **View/Edit** pages or **Search Results** pages), then the report options are automatically displayed in the **Actions** panel.

Basic Procedure

The basic report generation procedure is the same across all reports.

1. In the **Actions** panel on the left, under **Reports**, click **Generate Report**. The **Print Report** page appears.

Figure 209. Action Center: Print Report Page

Print Report:

Print Selections

Back Create Report

Choose the Report you Want to Print

Report:

- Item Card (PDF)
- Custom PDF Report (PDF)
- All 3x3 (MC Items) (PDF)
- Paper Preview (PDF)
- Summary Report (Excel)
- Item Use History (Excel)
- File Size Report (Excel)
- Assertion Report (Excel)
- Shared Entity Review Level and Version Report (Excel)
- Braille File Info (Excel)
- Interaction Attributes (Excel)
- Reversed Shared Report (Excel)
- Scanner File Report (Excel)
- Xtags Test XPress (Xtags)
- Xtags Test InDesign (Xtags)
- Content Validation Report (ZIP)
- Extract Accommodations (ZIP)

Select or Create an Input Set

Select Input Set: - Existing Input Sets -

-or-

Create Input Set Update Input Set Delete Input Set

Specify Custom Values to Print

Content Options:

- Attribute List
- Human Readable Rubric (Items only)
- Item Card (Items only)
- Screen Shots
- Scoring Assertions

Entity Options:

- Include Item-Stimulus Associations

Report Options:

- Include Page Number

2. From the *Choose the Report you Want to Print* section, specify the report you want to generate.
3. Depending on the report selected, additional controls may be displayed. Make the necessary selections before proceeding.
4. In the *Print Selections* section on the left, click **Create Report**. The selected report is generated, and depending on your browser, may download or save.

Manage Input Sets

For certain reports, such as the Item Summary Report, the Custom PDF Report, and the Assessment Report, you can either select attributes individually or create input sets containing attributes and values that you wish to print.

If you're planning to generate a report with the same set of attributes and values multiple times, it may make sense to create an input set containing those attributes and values. You can then select the input set from the *Select Input Set* dropdown list without having to manually select the attributes every time you generate the report.

Once you've selected an applicable report type to generate, you can add, edit, or delete input sets.

To create an input set:

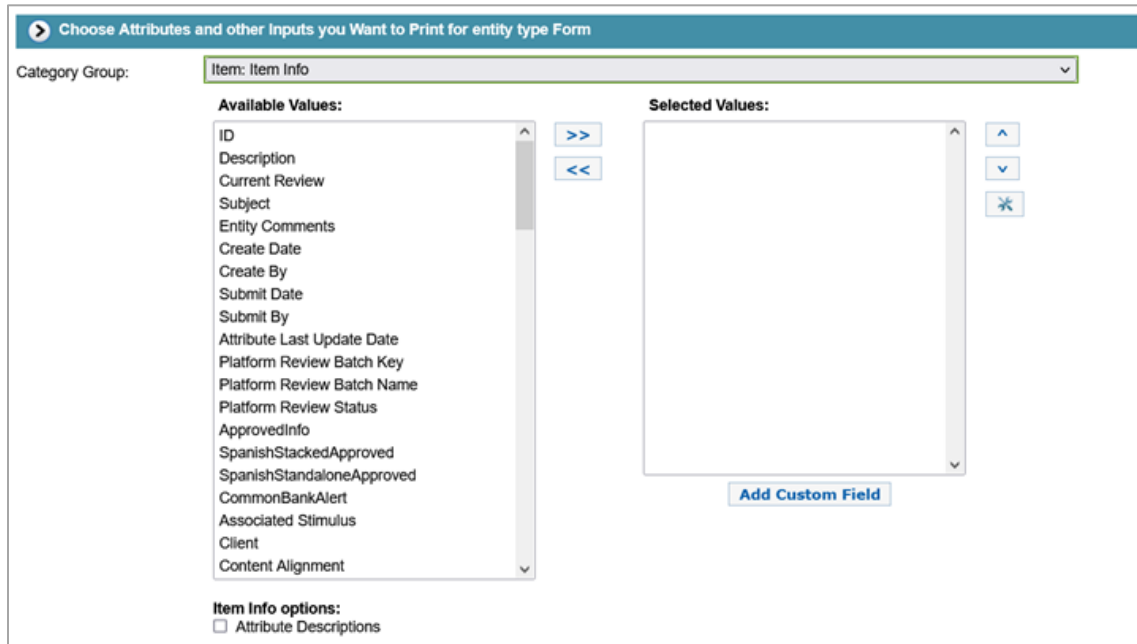
1. From the *Category Group* dropdown list, select an attribute category. The attributes are categorized by groups within entity types. A list of the categories and their descriptions can be found in [Table 10](#). When you select an attribute category, the available attributes are listed in the *Available Values* section.

Table 10: Available Attribute Categories

Category/Categories	Description
Form: Form Builder Info	This category contains attributes pertaining to the form or forms an item/stimulus belongs to. When the report is for a list of items, values are comma-separated. When the report is for a form, only a single value appears.
<ul style="list-style-type: none"> Item: Item Info Stimulus: Stimulus Info 	<p>These categories contain various item and stimulus attributes.</p> <p>For example, Platform Review Status provides the platform review status from the last batch an item/stimulus was in. Note that this may not be the same as the item/stimulus's current review level.</p> <p>As another example, ApprovedInfo lists the approved lanes with their version numbers. Note that for a shared item, only the alignment lane can be approved in the destination bank.</p>
<ul style="list-style-type: none"> Item: Review Stimulus: Stimulus Review 	These categories contain attributes corresponding to review levels. They provide information about the review outcomes from when an item/stimulus was last at those review levels. Note that a review outcome for a level may not be the same as the item/stimulus's current review level.
<ul style="list-style-type: none"> Item: ContentStandard Item: Socks 	These categories contain attributes corresponding to specific content standards and SOCKs, respectively, with information on whether an item is aligned to them.
Item: Form Association	<p>This category contains item attributes that are specific to the form or forms to which it belongs. When the report is for a list of items, values are comma-separated. When the report is for a form, only a single value appears.</p> <p>For example, the Block attribute provides the names of the form blocks to which the item belongs, and the Item Position attribute provides the positions in which the item appears on the forms.</p>
<ul style="list-style-type: none"> Item: Item ReviewLane Stimulus: Stimulus ReviewLane 	These categories contain attributes corresponding to certain individual lanes. They provide the current levels and statuses of an item/stimulus in those lanes.

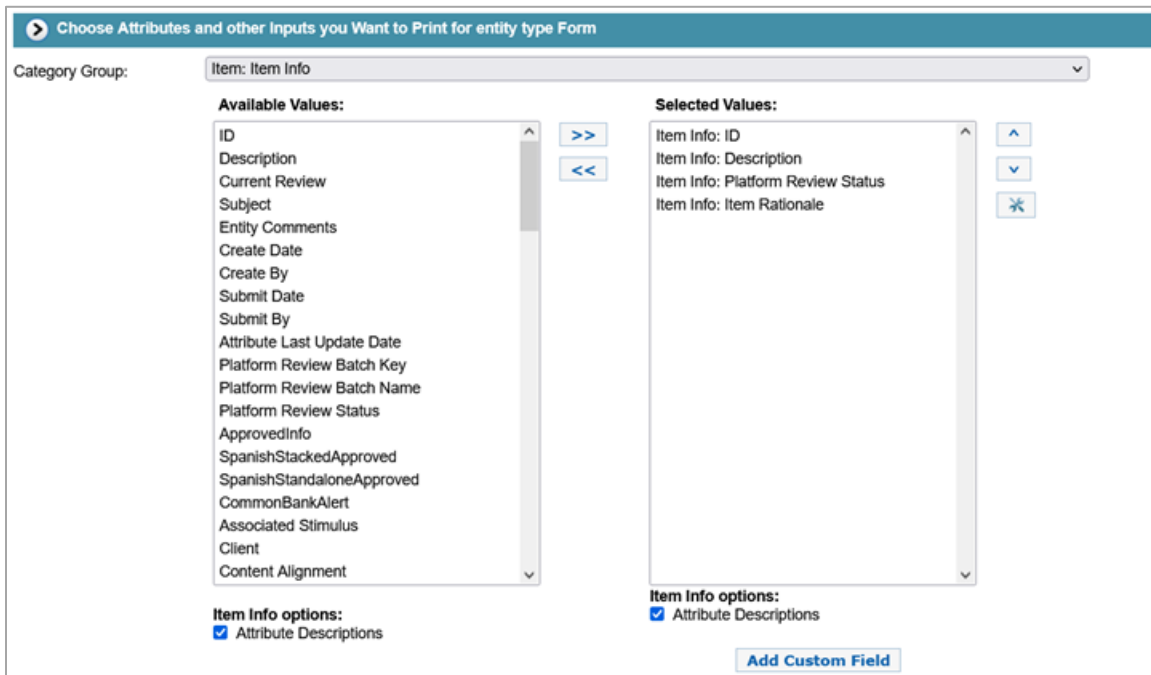
- Select the required attributes from the *Available Values* list on the left ([Figure 210](#)). The selected items are highlighted in blue. You can select multiple items simultaneously using the **Ctrl** or **Shift** key. The attributes include fields such as Mark up for FT, Additional Markup for Operational, IAT has HRR, IAT has Paper, and others. These fields provide key information about an item or stimulus.

Figure 210. Action Center: Print Report Page: Choose Attributes and Other Inputs You Want to Print for Entity Type Form



3. Click >> to move the attributes to the *Selected Values* list, as in [Figure 211](#). You can click << to move them back.

Figure 211. Action Center: Print Report Page: Choose Attributes and Other Inputs You Want to Print for Entity Type Form



- Repeat these steps until you have chosen all the required attributes from the different attribute groups.

In addition to attributes, you can also include other information in the summary report. These options, if available, are listed below the *Available Values* section. To include any of these values, mark the checkboxes. The options appear under the *Selected Values* section, as in [Figure 211](#).




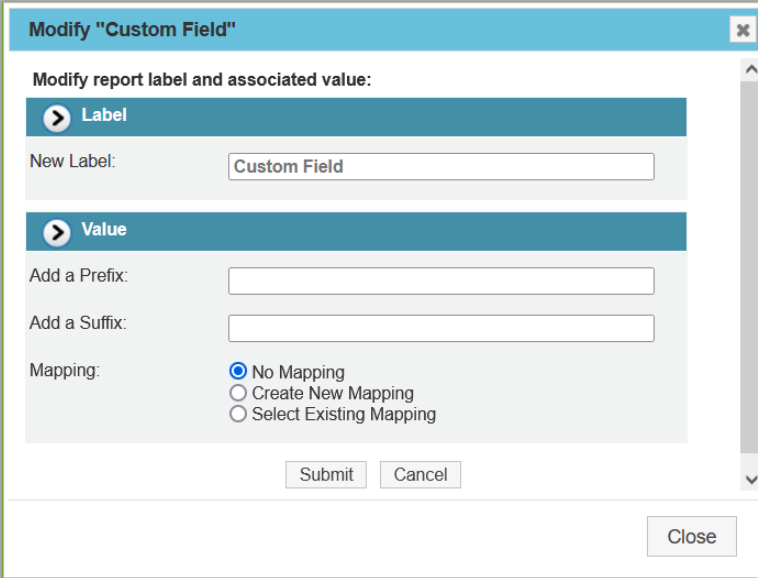
- If necessary, rearrange the order in which the attributes are listed using the  or  buttons. The report prints the attributes in the order in which the attributes are listed in the *Selected Values* list.
- Optional:* Specify customized labels for the attribute fields. For example, you can change the label for the attribute “Description” to “Item Name” or add a prefix or suffix to the label. To create a customized label, select the attribute, click , enter the new label and other necessary information in the dialog box that appears, and click **Submit**.
- Optional:* Create a custom field to be included on the report if required. To create a custom field, click **Add Custom Field** under the *Selected Values* section. Enter the label and other necessary information (such as mapping information) in the dialog box that appears ([Figure 212](#)). Click **Submit**. To remove a custom field from *Selected Values*, use the << button.

Figure 212. Modify “Custom Field” Window



The screenshot shows a dialog box titled "Modify 'Custom Field'". It is divided into two main sections: "Label" and "Value".

- Label Section:** Features a "New Label:" text input field containing the text "Custom Field".
- Value Section:** Includes two text input fields for "Add a Prefix:" and "Add a Suffix:". Below these is a "Mapping:" section with three radio button options: "No Mapping" (which is selected), "Create New Mapping", and "Select Existing Mapping".

At the bottom of the dialog, there are three buttons: "Submit", "Cancel", and "Close".

- Click **Create Input Set**. Additional controls display, as shown in [Figure 213](#).

Figure 213. Action Center: Select or Create an Input Set Section

9. In the *Input Set Name* field, enter a unique input set name.
10. From the *Shareable* options, specify whether the input set can be shared with other users. This setting cannot be changed after you've saved.
11. From the *Editable* options, specify whether the input set can be edited by other users. This setting cannot be changed after you've saved.
12. Click **Save**. A message appears, indicating that the input set has been successfully added. Click **OK**. The new input set is displayed in the *Select Input Set* dropdown list.

Note that most user roles cannot share an input set with another bank. Some administrator users can do this.

To update an input set:

1. Select the input set from the *Select Input Set* dropdown list. All the input set's values display in the *Selected Values* list.
2. In the instructions on creating an input set, follow steps [1–7](#).
3. Click **Update Input Set** when you are done editing. In the confirmation pop-up, click **OK**. Your changes to the existing input set are saved.

To delete an input set:

1. Select the input set from the *Select Input Set* dropdown list.
2. Click **Delete Input Set** to delete the input set. A message appears, confirming that the input set was successfully deleted. Click **OK**.

Print a Custom PDF Report of Item or Stimulus Content

You can generate custom reports in PDF format. For example, you can generate a PDF report of web-approved item content or latest item content that has not yet been web-approved.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item or stimulus IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Custom PDF Report**. Additional fields appear, allowing you to select the attributes you want to include.
3. From the *Select Input Set* dropdown list, select an appropriate preexisting input set if available. Refer to the [Manage Input Sets](#) section for information on how to create, edit, and delete input sets.
4. If no input sets exist or if you wish to manually select the content that you wish to include in the report, mark the appropriate checkboxes in the *Specify Custom Values to Print* section. Additional fields relevant to the selected checkbox are displayed. The available checkboxes are as follows:
 - **Attribute List:** This enables you to select the item attributes that you wish to include on the report.
 - **Screen Shots:** This enables you to specify the type of item content (such as latest content or web-approved content) that should be included in the report.
 - **Human Readable Rubric:** This enables you to include human-readable scoring guidelines in the report.
 - **Scoring Assertions:** This enables you to include scoring assertions in the report.
 - **Include Item-Stimulus Associations:** If you also selected **Attribute List**, this enables you to select the stimulus attributes that you wish to include on the report.
5. Next, select or enter values for the additional fields that are displayed.
 - a. To include web-approved or non-web-approved item content in the report:
 - i. From the *Content Options* field, verify that the checkbox for **Screen Shots** is checked.
 - ii. From the *Language* dropdown list, select the language in which the item content should be printed. The dropdown list displays the languages that are available for the items. You can also select **All** to include content in all available languages.

Figure 214. Print Report Page: Choose Screen Shot Options You Want to Print Section



The screenshot shows a section titled "Choose Screen Shot options you Want to Print". Below the title are two dropdown menus. The first is labeled "Language:" and has "en-us" selected. The second is labeled "Screenshot Type:" and has "LatestContent" selected.

- iii. From the *Screenshot Type* dropdown list, select the item content that should be included. To include the latest item content or item content that has not yet been web-approved, select **LatestContent**. To include content that has been web-approved, select **WebApprove**.



Note: If you simply want to create a PDF report containing screenshots of item content that has been web-approved or not been web-approved, complete this section and proceed to step [6](#).

- b. To specify the item attributes (such as Description, ID, Subject, and Grade) that you want to include in the report:
 - i. From the *Content Options* field, verify that the checkbox for **Attribute List** is checked, as in [Figure 215](#).
 - ii. Follow the instructions in [Manage Input Sets](#), referring to [Figure 215](#).

Figure 215. Detail of Print Report Page

The screenshot shows two main sections of a configuration page:

- Specify Custom Values to Print:** This section contains several options:
 - Content Options:** Attribute List, Human Readable Rubric (Items only), Item Card (Items only), Screen Shots, and Scoring Assertions.
 - Entity Options:** Include Item-Stimulus Associations.
 - Report Options:** Include Page Number.
 - Header Text:** An empty text input field.
 - Resolution Boxes:** A dropdown menu with options: Accept, Accept as Appears, Accept as Revised, and Reject.
 - Footer Text:** An empty text input field.
- Choose Attributes and other Inputs you Want to Print for entity type Item:** This section features a dropdown menu for 'Category Group' currently set to '- Please select a Category Group -'. Below it are two columns:
 - Available Values:** An empty list box with a vertical scrollbar.
 - Selected Values:** An empty list box with a vertical scrollbar, up/down arrows, and a '*' icon.
 - Between the columns are '>>' and '<<' buttons.
 - At the bottom right is an 'Add Custom Field' button.

- c. To include item-stimulus associations:

- i. From the *Content Options* field, verify that the checkbox for **Include Item-Stimulus Associations** is checked.
 - ii. From the *Choose Attributes...for entity type Stimulus* section, select stimulus attribute values in the same way as selecting item attributes.
- d. To include additional information, such as header, footer, and resolution text boxes on the report, specify the values in the appropriate fields ([Figure 216](#)).

Figure 216. Detail of Choose Attributes and Other Inputs You Want to Print for Entity Type Stimulus Section

6. From the *Print Selections* section, click **Create Report**. The report ([Figure 217](#)) downloads or opens, depending on your browser.

Figure 217. Sample Custom PDF Report

Print a Paper Preview (PDF) Report

You can generate a report in PDF format displaying how the selected items will be presented on a paper-based test.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Paper Preview**.
3. If the language dropdown list appears, choose a language (**en-us** is English).
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Paper Preview Report downloads or opens. Each item included in the report is displayed on a new page with the item ID on top.

Print an Alt 1×1 (MC Items) (PDF) Report

For items with Multiple Choice (MC) interactions containing two to four options, you can generate a 1×1 report in PDF format. This report includes items only. For a stimulus report, refer to [Print an Alt Posters \(PDF\) Report](#).

1. From the **Action Center** page ([Figure 201](#)), select a config file and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report You Want to Print* section, select **Alt 1x1 (MC Items)**.
3. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Print an Alt 3×3 (MC Items) (PDF) Report

For items with Multiple Choice (MC) interactions containing only image options, you can generate a 3×3 report in PDF format. This report includes items only. For a stimulus report, refer to [Print an Alt Posters \(PDF\) Report](#).

1. From the **Action Center** page ([Figure 201](#)), select a config file and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report You Want to Print* section, select **Alt 3x3 (MC Items)**.
3. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Print an Alt Combined 3×3/Strip (PDF) Report

You can generate a report containing a combination of Alt 3×3 and Strip report in PDF format. This report can be generated for Multiple Choice items included on any form in any bank.

1. Do either of the following:
 - When viewing a test as described in [Managing Tests](#), following the instructions in [Edit Test Item and Stimulus Attributes](#), use the *Response Type* field of each listed item to specify whether to create a 3×3 or strip for that item.
 - When viewing a form as described in [Managing Forms](#), follow the instructions in [Updating Multiple Choice Item Response Type](#) to specify whether to create a 3×3 or strip for that item.
2. From the **Action Center** page ([Figure 201](#)), select a config file or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
3. From the *Choose the Report you Want to Print* section, select **Alt Combined 3x3/Strip Report**. Additional fields appear.
4. From the *Choose a design option* section, select the design you want to use.
5. In the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Print an Alt Posters (PDF) Report

You can generate a Posters report in PDF format. This report includes stimuli only.

1. From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the stimulus IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Alt Posters**.
3. From the *Choose Orientation For Alt Poster* section, choose an orientation.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Print a Summary (Excel) Report

You can generate an item or stimulus summary report along with the entities' attributes. The Content Operations team and the Psychometrics (Tech) team may sometimes need to generate summary reports. Item summary reports may be used to identify the correct answers for items in test forms.

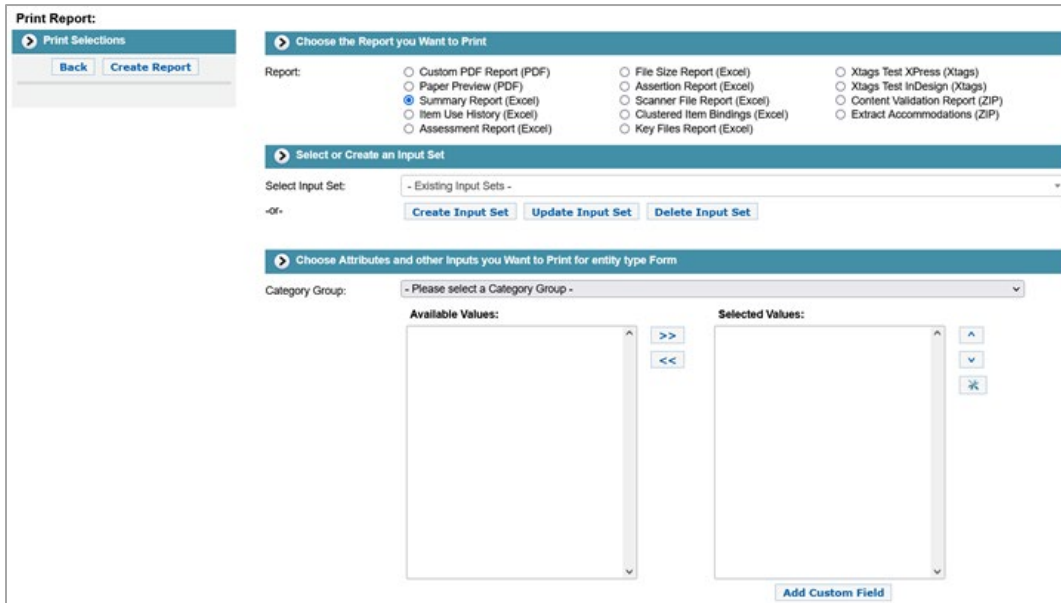
1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item or stimulus IDs you want to include, then click **Generate Report**.

- If you're uploading an ID file, use a text file with no header. Do not include any spaces after the last item or stimulus. To upload, select the entity type and click **Browse...**

The **Print Report** page appears.

2. From the *Choose the Report you Want to Print* section, select **Summary Report**. Additional controls appear, as in [Figure 218](#), allowing you to select the attributes you want to include.

Figure 218. Action Center: Print Report Page with Summary Report Selected



3. From the *Select Input Set* dropdown list, select any preexisting input sets or attribute sets that may have been created. Refer to the [Manage Input Sets](#) section for information on how to create, edit, and delete input sets.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens. A sample is shown in [Figure 219](#).

Figure 219. Sample Item Summary Report

	B	C	D	E	F	G	H
1	Description	Current Review	Subject	Associated Stimulus	Senior Content Review - Review Date	Senior Content Review - Reviewer	AIR Web Approval - Review Date
2	Fruit	Locked Operational Pool	ELPA21		Nov 13 2015 2:19PM	Paula_Sable	Nov 16 2015 3:24PM
3	Classroom	Locked Operational Pool	ELPA21	2	Nov 16 2015 1:49PM	Paula_Sable	Nov 16 2015 3:28PM
4	Making Soup	Locked Operational Pool	ELPA21	3	Nov 16 2015 2:49PM	Amina_Ghannam	Nov 16 2015 3:30PM
5	Making Soup	Locked Operational Pool	ELPA21	3	Nov 16 2015 2:50PM	Amina_Ghannam	Nov 16 2015 3:30PM

Print an Item Use History (Excel) Report

You can generate an item use history report in Excel format. It contains the forms and test administrations in which the selected items have been used.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Item Use History**.
3. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens ([Figure 222](#)).

Figure 220. Sample Item Use History Report

	A	B	C	D	E	F	G	H	I	J
1	Item ID	Item Description	Form ID	Form Name	Item Position	Item Role	Admin ID	Admin Name	Admin Description	Admin Date
2	25631	Judging the Ocean by Its Cover/Oceans: The Great Unknown - Common_Core	4771	Reading3-SP18-FM25-FT22	12	FieldTest	1281	Reading G3-SP18-Paper		4/9/2018 12:00:00 AM
3	25631	Judging the Ocean by Its Cover/Oceans: The Great Unknown - Common_Core	5912	Grade 3 Reading Paper::Spring 2018::EFT	229		1385	Grade 3 Reading Paper::Spring 2018		4/9/2018 12:00:00 AM

Print an Assessment Report (Excel)

You can generate an Assessment Report in Excel format.

1. From the **Action Center** page ([Figure 201](#)), make selections and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Assessment Report**. Additional fields for selecting the attributes you want to include appear ([Figure 209](#)).
3. From the *Select Input Set* dropdown list, select an appropriate preexisting input set if available. Refer to the [Manage Input Sets](#) section for information on how to create, edit, and delete input sets.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Assessment Report ([Figure 221](#)) downloads or opens.

Figure 221. Sample Assessment Report

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Seq	ID	Description	Current Review	Subject	Grade	Reporting Category	FL-ELA-v1.Lowest Level	IAT Interaction Type	IAT Interaction Subtype	IAT Answer Key	Answer Key (Part II)	DOK	Item Point	ID
2	1	28816	Lighthouses	Field Test Pool	ELA	3	1 Key Ideas and	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	C		2	1 pt.	2041
3	2	28826	Lighthouses	Field Test Pool	ELA	3	3 Integration of	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	B		2	1 pt.	2041
4	3	28824	Lighthouses	Field Test Pool	ELA	3	2 Craft and Structure	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	D		2	1 pt.	2041
5	4	28819	Lighthouses	Field Test Pool	ELA	3	1 Key Ideas and	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	D		2	1 pt.	2041
6	5	28825	Lighthouses	Field Test Pool	ELA	3	3 Integration of	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	A		2	1 pt.	2041
7	6	28827	Lighthouses	Field Test Pool	ELA	3	3 Integration of	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	B		2	1 pt.	2041
8	7	28817	Lighthouses	Field Test Pool	ELA	3	1 Key Ideas and	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice	D		2	1 pt.	2041
9	8	29634	My Family in	Field Test Pool	ELA	3	4 Language and	Grade 3 - FL-ELA-	inlineChoiceInteractio	editTaskWithChoice			1	1 pt.	2099
10	9	29635	My Family in	Field Test Pool	ELA	3	4 Language and	Grade 3 - FL-ELA-	inlineChoiceInteractio	editTaskWithChoice			1	2 pts.	2099
11	10	29636	My Family in	Field Test Pool	ELA	3	4 Language and	Grade 3 - FL-ELA-	inlineChoiceInteractio	editTaskWithChoice			1	2 pts.	2099
12	11	28770	A Math Star	Field Test Pool	ELA	3	3 Integration of	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice		A	2	1 pt.	2031
13	12	28765	A Math Star	Field Test Pool	ELA	3	1 Key Ideas and	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice		B	2	1 pt.	2031
14	13	28815	A Math Star	Field Test Pool	ELA	3	2 Craft and Structure	Grade 3 - FL-ELA-	choiceInteraction	multipleChoice		C	2	1 pt.	2031

Print a File Size Report (Excel)

You can generate a File Size Report for selected items and stimuli, or for all items and stimuli in a bank, in Excel format.

1. From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the item or stimulus IDs you want to include. To print a report for the entire bank, from the *Input Type* field, select **Bank**.
2. Next, click **Generate Report**. The **Print Report** page appears.
3. From the *Choose the Report you Want to Print* section, select **File Size Report**.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the ZIP file is downloaded or opened. It contains the File Size Report ([Figure 222](#)) and a log file of missing data, if applicable.

Figure 222. Sample File Size Report for an Item Bank

	A	B	C	D	E	F	G
1	Bank Number	234					
2	Bank Name	IB_ELPA_21_Practice_Test					
3							
4	Entity Type	Entity ID	Interaction	Language	Max Delivery Size (KBs)	Package Type	Exceeds Spec
5	Item	20		English	3.74	TestGenEd	False
6	Item	20		English	3.74	TestApip	False
7	Item	22		English	1.33	TestGenEd	False
8	Item	22		English	1.33	TestApip	False
9	Item	23		English	0.85	TestGenEd	False
10	Item	24		English	1.56	TestGenEd	False
11	Item	24		English	1.56	TestApip	False
12	Item	26		English	1.38	TestGenEd	False
13	Item	26		English	1.38	TestApip	False
14	Item	28		English	1.46	TestGenEd	False
15	Item	28		English	1.46	TestApip	False
16	Item	30		English	1.51	TestGenEd	False
17	Item	30		English	1.51	TestApip	False
18	Item	32		English	1.14	TestGenEd	False
19	Item	32		English	1.14	TestApip	False
20	Item	34		English	1.07	TestGenEd	False
21	Item	34		English	1.07	TestApip	False
22	Item	36		English	1.15	TestGenEd	False
23	Item	36		English	1.15	TestApip	False
24	Item	38		English	1.08	TestGenEd	False
25	Item	38		English	1.08	TestApip	False
26	Item	40		English	1.16	TestGenEd	False
27	Item	40		English	1.16	TestApip	False

Print a Readability Metric Report (Excel)

You can generate an Excel report on the readability metrics of items or stimuli.

1. From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the item or stimulus IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Readability Metric**.
3. Select at least one readability formula to include as a column in the report.

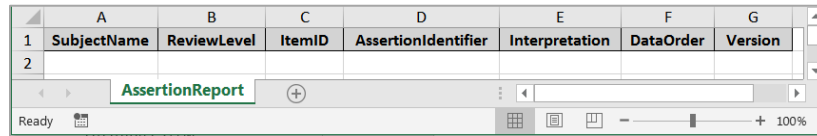
- From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Print an Assertion Report (Excel)

You can generate an Assertion Report in Excel format. It contains the assertions created in IAT.

- From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the item or stimulus IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
- From the *Choose the Report you Want to Print* section, select **Assertion Report**.
- From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens ([Figure 223](#)).

Figure 223. Assertion Report Fields for an Item Bank



	A	B	C	D	E	F	G
1	SubjectName	ReviewLevel	ItemID	AssertionIdentifier	Interpretation	DataOrder	Version
2							

Print an Approved Report (Excel)

You can generate an Excel report containing information about which version of an item or stimulus has been approved.

- From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the item or stimulus IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
- From the *Choose the Report you Want to Print* section, select **Approved Report**.
- From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens ([Figure 224](#)).

Figure 224. Sample Approved Report

	A	B	C	D
1	EntityType	EntityID	ApprovedInfo	
2	Item	20	English - Approved Package 10, Approved Xml Version 4, Latest Package 10, Latest Xml Version 4.	
3	Item	22	English - Approved Package 12, Approved Xml Version 2, Latest Package 12, Latest Xml Version 2.	
	Item	24	English - Approved Package 8, Approved Xml Version 2, Latest Package 8, Latest Xml Version 2.	

EntityApprovedInfoReport

Print an Interaction Attributes (Excel) Report

You can generate a report in Excel format containing information about the interaction types constituting an item, such as the interaction type, whether it uses the scoring template, or whether it includes ASL video.

1. From the **Action Center** page (Figure 201), make a selection or upload an ID file containing the item IDs you want to include. Click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Interaction Attributes**.
3. In the section *Choose interaction types that you want to include in the Interaction Attributes Report*, select interaction types from *Available Interactions* and use the >> button to add them to *Selected Interactions*. Hold down the **Shift** or **Ctrl** key to select multiple types. To remove types from *Selected Interactions*, select them and use the << button.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens.

Figure 225. Sample Interaction Attributes Report

	A	B	C	D	E	F	G	H	I	J	K	L
1	ItemID	Grade	IAT Answer Key	Interaction Type	Interaction Subtype	Place in Passage in Use	Section in Use	Scoring Template in Use	ASL Video	Choice Orientation	Choice Number of Options	Choice Min Select
2	33108			choiceInteraction	multipleChoice		false	False	false	vertical	4	1
3												
4												

Print a Scanner File Report (Excel)

You can generate a report in Microsoft Excel format containing information about scanned item types.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Scanner File Report**. The *Scanner File Report* section displays. It includes a table of existing Scanner File Reports with version numbers.
3. Click **Generate Scanner File**. In the pop-up that appears, enter a comment and click **Generate**. Click **OK** in the confirmation pop-up. Once generated, the report is listed in the table with a version number, as in [Figure 226](#).

Figure 226. Print Report Page: Scanner File Report Section

Compare	Report Key	Last Updated	User	Version	Status	Comment	Download (Excel)	Delete	Upload (Excel)	Publish (Xml)
<input type="checkbox"/>	99d297c9-d4c0-4a5c-ac88-bc823be1a554	3/6/2023 2:08:24 PM	Suzanne Delage	2	GENERATED	Comment Log	Download	Delete	Upload	Publish
<input type="checkbox"/>	b333a1ca-1e71-4cb3-ad77-e5e3a31cb770	3/6/2023 12:07:18 PM	Suzanne Delage	1	GENERATED	Comment Log	Download	Delete	Upload	Publish

The following actions can be performed on this page:

- If the Scanner Report criteria consist of an item list, click **Item List** to view the IDs in a pop-up.
- To read a report log in a pop-up, click **Log** beside the report.
- Click **Download** to download or open a report, depending on your browser.
- To delete a report, click **Delete**. In the pop-up that appears, enter a comment and click **Yes**. A pop-up confirms that the report has been deleted. Click **OK**.
- To restore a deleted report, click **UnDelete**. A pop-up confirms that the report has been restored. Click **OK**.

- To replace or supplement a generated report with an upload, click **Upload** beside the existing report. In the **Upload Excel** window that appears ([Figure 227](#)), do the following:
 - a. To download a template (XLSX), click **Download**. Fill out the template and save it to your computer.
 - b. *Optional:* To replace the existing report, mark the checkbox that reads **Remove existing selected scanner report before upload?**. If you don't do this, the existing scanner report remains.
 - c. Click **Browse...** and use the pop-up to open the filled-out Excel file from your computer.
 - d. Click **Upload**. A pop-up appears, indicating whether the file has uploaded successfully. Close the pop-up. The new report is listed in the table, with the version number incremented.

Figure 227. Upload Excel Window

Upload Excel

Upload Scanner Report

Please use the provided template, that can be downloaded below. For each Scanner Rows populate all columns (FormName, Grade, Form, Item Position, ITS_ID, ITS_Bank, MaxItemScore, ItemType, MultiPart, Bubbles, Part, Item Format, Item Role). If there are any issues you will be shown a list of the issues encountered.

Remove existing selected scanner report before upload?

Browse for Excel: No file selected.

Please click download button to see a template of excel file:

- To publish a report, click **Publish**. In the pop-up that appears, enter a comment and click **Yes**. Click **OK** in the confirmation pop-up.
- To compare two reports, mark the checkboxes next to the two files you wish to compare and click **Compare Scanner Report**. The comparison log displays in the **Scanner Report Compare Report** window ([Figure 228](#)).

Figure 228. Detail of Print Report Page: Scanner Report Compare Report Window



Print a Clustered Item Bindings (Excel) Report

You can generate a Clustered Item Bindings Report listing the documentation that accompanies the bindings. Only approved items and rubrics are included.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Clustered Item Bindings**.
3. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Clustered Item Bindings Report downloads or opens.

Print an Exemplar Report (Excel)

You can generate an Exemplar Report that lists all exemplars and their pass/fail statuses. When an item lacks an exemplar, its ID will appear in a separate Excel worksheet called **Missing Exemplars**.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Exemplar Report**.
3. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Exemplar Report downloads or opens.

Print an Extract Text Report (Excel)

You can export an XLSX report containing approved item HTML text content in a specified language.

1. From the **Action Center** page ([Figure 201](#)), upload a file listing item IDs, then click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Extract Text**.
3. From the *Choose Language* section, select a language.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Extract Text report downloads or opens.

Figure 229. Sample Extract Text Report

	A	B	C	D	
1	BankKey	EntityType	EntityID	Language	Text
2	10013	Item	19225	en-us	The African wild dog is one canine that would never make a good pet. African wild dogs live and hunt
3	10013	Stimulus	3112	en-us	Listen to presentation One Two Three
4					
5					
6					

Print an HVR Script Report (Excel)

You can export an XLSX report containing the script text of items' and/or stimuli's human voice recording (HVR) content for a selected language.

1. From the **Action Center** page ([Figure 201](#)), upload a file listing item or stimulus IDs, then click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **HVR Script Report**.
3. From the *Choose Language* section, select a language.
4. From the *Choose HVR Script Report Options* section, select a package type. The approved package contains approved item content. The latest package contains the latest item content, regardless of whether it is approved.
5. From the *Print Selections* section, click **Create Report**. Depending on your browser, the HVR Script Report downloads or opens.

Figure 230. Sample HVR Script Report

	A	B	C	D	E	F	G	H	I	J	K
1	BankKey	EntityType	EntityID	Language	Text	Association	error				
2	10013	Item	19225	en-us	This, along with the pack's teamwork.	3112					
3	10013	Stimulus	3112				Approved HVR Script for en-us content does not exist				
4											
5											

Print a Copyright Report (Excel)

You can export an XLSX report listing stimuli's copyright statuses and the values of the Markup for FT and Additional Markup for Operational Pool attributes. Currently, copyright is only applicable for stimuli.

1. From the **Action Center** page ([Figure 201](#)), select your inputs (for example, upload a file with the stimulus IDs), then click **Generate Report**. The **Print Report** page appears.
1. From the *Choose the Report you Want to Print* section, select **Copyright Report**.
2. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Copyright Report downloads or opens ([Figure 231](#)).

Figure 231. Sample Copyright Report

Bank key	Entity key	Entity Type	Entity description	Copyright Review Lane	Review lane status	Set name	Attribute name	Attribute value
10013	3042	Stimulus	QA copyright	Stimulus: Copyright Initial Entry	Processing		Additional Markup for Operational	N/A
10013	3042	Stimulus	QA copyright	Stimulus: Copyright Initial Entry	Processing		Markup for FT	N/A
10013	3042	Stimulus	QA copyright	Stimulus: Copyright Initial Entry	Processing	2	Contract Expiration Date	2024-05-31
10013	3042	Stimulus	QA copyright	Stimulus: Copyright Initial Entry	Processing	2	Cost of License	N/A
10013	3042	Stimulus	QA copyright	Stimulus: Copyright Initial Entry	Processing	2	Permission Type	Copyright Clearance Center (CCC)
10013	3042	Stimulus	QA copyright	Stimulus: Copyright Initial Entry	Processing	2	Source of Text	N/A

Print a Key Files Report (Excel)

You can generate a Key Files Report that lists the item keys of the selected items in Excel format.

1. From the **Action Center** page ([Figure 201](#)), make selections and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Key Files Report**. Additional fields appear, allowing you to select the attributes you want to include ([Figure 209](#)).
3. From the *Select Input Set* dropdown list, select an appropriate preexisting input set if available. Refer to the [Manage Input Sets](#) section for information on how to create, edit, and delete input sets.
4. From the *Print Selections* section, click **Create Report**. Depending on your browser, the Key Files Report downloads or opens ([Figure 232](#)).

Figure 232. Sample Key Files Report

A	B
Instrument = "1659669 (Florida)FL-GEN-SUM-UD-ELA-Reading_Paper-3-Spring-2018"	
Forms = 1 Reading3-SP19-FM1-AN1	
i_28816 28816 0 MC 4 1 3 8 9	
i_28826 28826 0 MC 4 1 2 8 9	
i_28824 28824 0 MC 4 1 4 8 9	
i_28819 28819 0 MC 4 1 4 8 9	

KeyFileReport (+)

Print an XTags Test Report (XPress or InDesign) (XTags)

Although XTags Test Reports are now deprecated, you can still generate one in either XPress or InDesign format. This report contains all the content for items or stimuli that have paper content.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item or stimulus IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select either **Xtags Test XPress** or **Xtags Test InDesign**. In the pop-up, click **OK**.
3. If necessary, choose a language from the dropdown list (**en-us** is English).
4. If no input sets exist or if you wish to manually select the content to include in the report, mark the appropriate checkboxes in the *Specify Custom Values to Print* section. Additional fields relevant to the selected checkbox are displayed. The available checkboxes are as follows:
 - **Attribute List:** This enables you to select the item attributes that you wish to include on the report. Refer to the [Manage Input Sets](#) section for information on how to create, edit, and delete input sets.

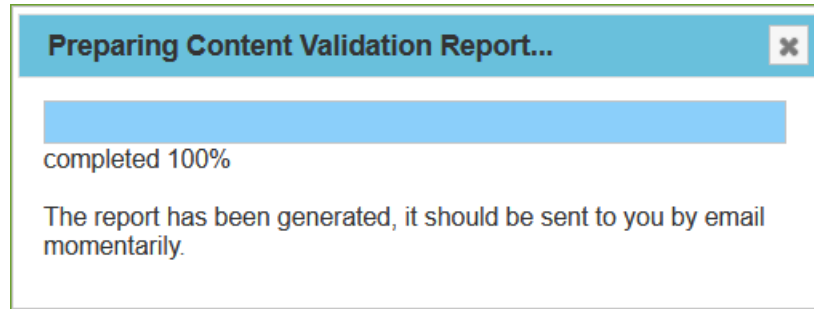
- **Include Item-Stimulus Associations:** If you also selected **Attribute List**, this enables you to select the stimulus attributes that you wish to include on the report.
5. Select or enter values for the additional fields that are displayed.
 - a. To include header or footer text, enter the required text in the *Header Text* and *Footer Text* fields.
 - b. To select the item attributes (such as Description, ID, Subject, and Grade) that you want to include in the report:
 - i. From the *Content Options* field, verify that the checkbox for **Attribute List** is checked.
 - ii. From the *Category Group* dropdown list, select an attribute category to view and select from the available values listed in the *Available Values* section.
 - c. To include item-stimulus associations:
 - i. From the *Entity Options* field, verify that the checkbox for **Include Item-Stimulus Associations** is checked.
 - ii. From the *Choose Attributes...for entity type Stimulus* section, select stimulus attribute values the same way you would select item attributes.
 6. Click **Create Report**. A ZIP file containing the XTags files downloads or opens, depending on your browser.

Print a Content Validation Report (ZIP)

You can generate a ZIP file containing a Content Validation Report. This report validates the content of items or stimuli and lets you know if there are any errors associated with the content. For example, this report alerts you to expired stimulus copyrights.

1. From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. Select **Content Validation Report** and click **Create Report**. The **Preparing Content Validation Report...** pop-up appears ([Figure 233](#)), indicating the progress of the report generation.

Figure 233. Preparing Content Validation Report... Pop-Up



3. Close the pop-up at any time. When the process completes, a ZIP file containing the report is sent to your email. A sample report is shown in [Figure 234](#).

Figure 234. Sample Content Validation Report

	A	B	C	D	E	F
	ErrorCode	EntityType	EntityKey	Subject	Current Review Level (Template)	Message
1	ContentExpired	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	Copyright of Stimulus 2993 is past the expire date
2	ContentIsNotApproved	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	Stimulus 2993 Copyright Lane is not approved, please approve the Str
3	ContentIsNotApproved	Item	17674	ELA	All Web Approval	Item 17674 is not approved, please approve the Item
4	VersionMismatch	Item	17672	ELA	Client Field Test Pool Review and Resolution	The pt-phTTS file in AlternateTTS package was modified after the web approval
5	VersionMismatch	Item	17672	ELA	Client Field Test Pool Review and Resolution	The ti-phTTS file in AlternateTTS package was modified after the web approval
6	PlatformReview	Item	17672	ELA	Client Field Test Pool Review and Resolution	For Item 17672, BaseTranslation has skipped Platform Review (Markup
7	VersionMismatch	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	The pt-phTTS file in AlternateTTS package was modified after the web approval c
8	VersionMismatch	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	The ti-phTTS file in AlternateTTS package was modified after the web approval c
9	VersionMismatch	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	The Associations file in Associations package was modified after the web approval c
10	AssociatedContentMissing	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	The content of item 17674 associated to Stimulus 2993 missing from Package with error message: Item-10013-17674 does c
11	PlatformReview	Stimulus	2993	ELA	Stimulus: Client Field Test Pool Review and Resolu	For Stimulus 2993, BaseTranslation has skipped Platform Review (Markup
12						

Print an Extract Accommodations (ZIP) Report

You can generate a ZIP file that contains accommodation text available for items included on a paper test.

1. From the **Action Center** page ([Figure 201](#)), make a selection or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Extract Accommodations**.

Figure 235. Extract Accommodations Report Options

3. From the accommodation types list that appears, select the accommodations you wish to extract. Use the **Ctrl** or **Shift** key to select more than one.
4. *Optional*: To extract images associated with the accommodations, mark the **Download images used in accommodation?** checkbox.

- From the *Print Selections* section, click **Create Report**. A ZIP file downloads or opens, depending on your browser. It contains folders for items and stimuli as applicable, along with an Accommodations Report in Excel format. If images are not included in the extract, only the Excel report is generated.

Figure 236. Sample Accommodations Report

Entity Type	Entity Key	Language	Tagged Content Type	Tagged Content	Tagged Content Location	Number Text	Text To Speech Pronunciation	Text To Speech Pronunciation 2	Braille Text	Tagged Content ID	Tagged Content ID#B
Item	82246-us	text	Progression	Content						assessmentItem/ItemBody/ItemDS/1/1/Item	
Item	82246-us	text	Event Step	Answer	Monday, June					assessmentItem/ItemBody/ItemDS/1/1/Item	
Item	82246-us	text	Content	Answer	content_1000					assessmentItem/ItemBody/ItemDS/1/1/Item	

Print a Review Level (Excel) Report

You can generate a report in Excel format displaying the different review levels for every item and stimulus in a bank.

- From the Action Center, from the *Input Type* field, select **Bank**.
- Next, click **Generate Report**. The *Print Report* page appears ([Figure 237](#)).

Figure 237. Print Report Page After Selecting Bank Input Type

Print Report:

Print Selections
 Choose the Report you Want to Print

Report:

File Size Report (Excel)
 Review Level (Excel)

Shared Entity Review Level and Version Report (Excel)
 Reversed Shared Report (Excel)

- From the *Choose the Report you Want to Print* section, select **Review Level**.
- From the *Print Selections* section, click **Create Report**. The ZIP file containing the Review Level Report ([Figure 238](#)) downloads or opens, depending on your browser.

Figure 238. Sample Review Level Report for an Item Bank

Entity Type	Subject	Order	Review Type	Allow Edit Of Item Attribute	Allow Edit Of Item Content	MiniloopFlg	Clone	Language	ENG TTS Tagging	Spanish TTS Tagging	Generate
Item	ELPA21	0	Preliminary Review	X	X		X	ENU			
Item	ELPA21	1	Editorial Review	X	X			ENU			
Item	ELPA21	2	Senior Content Review	X	X			ENU			
Item	ELPA21	3	Batch Review	X	X			ENU			
Item	ELPA21	4	Client Review	X				ENU			
Item	ELPA21	5	Audio Review	X	X			ENU			
Item	ELPA21	6	Committee Review/Resolution	X	X			ENU			
Item	ELPA21	7	AIR Web Approval	X	X			ENU	X	X	
Item	ELPA21	8	Field Test Pool	X				ENU			
Item	ELPA21	9	Data Review	X				ENU			
Item	ELPA21	10	Locked Operational Pool	X				ENU			
Item	ELPA21	55	Archive					ENU			
Item	ELPA21	600	Rejected					ENU			

Print an Item Card (PDF) Report

You can generate an Item Card report for paper-based alternate assessment banks in PDF format.

1. From the *Input Type* field on the **Action Center** page ([Figure 201](#)), select **Upload File**.
2. Upload an ID file containing the item IDs you want to include in the report.
3. Click **Generate Report**. The **Print Report** page appears.
4. From the *Choose the Report you Want to Print* section, select **Item Card**. An additional dropdown list appears, allowing you to select the type of item card you want to include.
5. From the *Card Type* dropdown list, select the item card type.
6. From the *Print Selections* section, click **Create Report**. Depending on your browser, the report downloads or opens ([Figure 239](#)).

Figure 239. Sample Item Card Report for an Item Bank

Secure Materials	
Item Properties for Item ID 5	
Subject	Mathematics
ITS ID	5
Description	Four plus Three
Item Attributes for Item ID 5	
IAT Interaction Subtype	scoreInputMultipleChoice
Item Standards for Item ID 5	
There is no standard available to view!	
Secure Materials	
FormID	Upload::SCAlt::2017
FormKey	352
Analysis Data	93
IRT Statistics for Item ID 5	
A	0.76
B	0.04
C	0.17
Average step value	0.32

Print a Braille File Info (Excel) Report

You can generate a report containing braille information for items that include braille in Excel format.

1. From the **Action Center** page (Figure 201), select a config file or upload an ID file containing the item IDs you want to include and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Braille File Info**.
3. From the *Print Selections* section, click **Create Report**. The report downloads or opens, depending on your browser.

Figure 240. Sample Braille File Info Report

	A	B	C	D	E	F	G	H	I	J	K	
	EntityType	EntityID	Grade	SubjectName	BrailleType	BrailleSubType	BrailleVersion	IsLatestVersionApproved	BrailleFileName	BrailleEditedBy	BrailleEditComment	Br
1	Item	33108	11	Reading	BRF	TDS_BT_EXL	1	Yes	brf_enu_tds_bt_raj	raj	swari_mahal braille	3/3
2	Item	33108	11	Reading	BRF	TDS_BT_UCL	1	Yes	brf_enu_tds_bt_raj	raj	swari_mahal braille	3/3
3	Item	33108	11	Reading	BRF	TDS_BT_UXL	1	Yes	brf_enu_tds_bt_raj	raj	swari_mahal braille	3/3
4	Item	33108	11	Reading	BRF	TDS_BT_ECL	6	Yes	brf_enu_tds_bt_raj	raj	swari_mahal braille	3/3
5	Item	33108	11	Reading	BRF	TDS_BT_ECL	6	Yes	brf_enu_tds_bt_raj	raj	swari_mahal braille	3/3
6												
7												
8												
9												

Print a Shared Entity Review Level and Version Report (Excel)

You can generate a report in Excel format listing a bank’s shared entities. It includes their review levels in both the source and the destination banks, along with their versions.

1. From the **Action Center** page (Figure 201), select **Bank** and click **Generate Report**. The **Print Report** page appears.

- From the *Choose the Report you Want to Print* section, select **Shared Entity Review Level and Version Report**.
- From the *Print Selections* section, click **Create Report**. Depending on your browser, the Shared Entity Review Level and Version Report downloads or opens.

Figure 241. Sample Shared Entity Review Level and Version Report

Subject	ID	Type	Destination Review Level	Source Review Level	Source Bank	Source ID	Review Level Mismatch	Source Template Xml Version	Dest
ELA	269	Stimulus	Stimulus: Preliminary Review	Stimulus: AIR Web Approval	Quality Assurance IAT Encryption UAT	253	Y	2	
ELA	271	Stimulus	Stimulus: Preliminary Review	Stimulus: Field Test Pool	Quality Assurance IAT Encryption UAT	252	Y	2	
ELA	274	Stimulus	Stimulus: Preliminary Review	Stimulus: AIR Web	Quality Assurance IAT	254	Y	2	

Print a Reversed Shared Report (Excel)

You can generate a Reverse Shared Report in Excel format. It contains information about which items in the bank have been shared with other banks and at what review levels each of those shared items are in within those destination banks.

- From the **Action Center** page ([Figure 201](#)), select **Bank** and click **Generate Report**. The **Print Report** page appears.
- From the *Choose the Report you Want to Print* section, select **Reverse Shared Report**.
- From the *Print Selections* section, click **Create Report**. Depending on your browser, the Reversed Shared Report downloads or opens.

Figure 242. Sample Reverse Shared Report

Subject	SourceEntityID	EntityType	SourceReviewLevel	DestinationReviewLevel	DestinationBank	DestinationEntityID	ReviewLevelMismatch
ELA	1354	Stimulus	Archive	Preliminary Review	Ohio Online Alt Practice IAT	37	Y
ELA	1411	Stimulus	Archive	Preliminary Review	Ohio Online Alt Practice IAT	34	Y
ELA	1416	Stimulus	Archive	Preliminary Review	Ohio Online Alt Practice IAT	35	Y
ELA	1425	Stimulus	Archive	Preliminary Review	Ohio Online Alt Practice IAT	36	Y
Mathematics	1457	Stimulus	Archive	Field Test Pool	Ohio Online Alt Practice IAT	12	Y

Print an Alt Doc (ZIP) Report

When alternate assessment items have Alt Doc content, you can generate a zipped Alt Doc report containing PDFs. The content includes all the Alt Doc content on the items, such as booklets.

1. From the **Action Center** page ([Figure 201](#)), make selections or upload an ID file containing the item or stimulus IDs you want to include, then click **Generate Report**. The **Print Report** page appears.
2. In the *Choose the Report you Want to Print* section, select **Alt Doc**. More sections and controls appear below, as in [Figure 243](#).

Figure 243. Print Report Page: Alt Doc (ZIP) Selected

Print Report:

Print Selections

Back Create Report

Choose the Report you Want to Print

Report:

- Custom PDF Report (PDF)
- Paper Preview (PDF)
- Alt Posters (PDF)
- Summary Report (Excel)
- Item Use History (Excel)
- Assessment Report (Excel)
- File Size Report (Excel)
- Assertion Report (Excel)
- Interaction Attributes (Excel)
- Scanner File Report (Excel)
- Clustered Item Bindings (Excel)
- Exemplar Report (Excel)
- Copyright Report (Excel)
- Key Files Report (Excel)
- Xtags Test XPress (Xtags)
- Xtags Test InDesign (Xtags)
- Content Validation Report (ZIP)
- Extract Accommodations (ZIP)
- Alt Doc (ZIP)

Choose Alt Report Options

Package type: Approved Package
 Latest Package

Test Name:

Short Name:

Form Name:

Year:

Grade:

Style Version:

Session Options

Session Name:

Session Number:

Items in session:

Field Test:

Writing section:

Restart Numbering:

Add Session Delete Previous Session

3. In the *Choose Alt Report Options* section, select a package type. The approved package contains approved item content. The latest package contains the latest item content, regardless of whether it is approved.
4. In the *Choose Alt Report Options* section, fill out the text fields. This content will appear in the teacher booklet.
5. In the *Choose Alt Report Options* section, use the *Style Version* dropdown list to select a version. The version determines how the content will appear in the booklet, depending on the styles that are set in the bank.

6. In the *Session Options* section, fill out the test session name, session number, and number of items in the session. The session name and number may be used in the content, for example, in the teacher booklet. The items will be included in the order in which they were listed.
7. In the *Session Options* section, use the checkboxes to set whether the session is for a field test, whether the items contain a writing section, and/or whether the session should restart numbering in the teacher booklet.
8. *Optional:* At the bottom of the page, use the **Add Session** button to add a new session. A new *Session Options* section appears. Repeat steps [6](#) and [7](#), then repeat this step as necessary.
9. *Optional:* At the bottom of the page, use the **Delete Previous Session** button to delete the last section listed. Repeat as necessary. The report must have at least one session.
10. In the *Print Selections* section, click **Create Report**. The Alt Doc report downloads.

Print an Interaction Response Report (ZIP)

You can generate a zipped JSON report containing interaction responses. This is mainly used by the Analysis team.

1. From the **Action Center** page ([Figure 201](#)), upload an item list and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Interaction Response Report**.
3. From the *Print Selections* section, click **Create Report**. The Interaction Response Report downloads.

Figure 244. Sample Interaction Response Report

```
1 [{"Id":"choiceInteraction_1.RESPONSE","subType":"multipleChoice","responses":[{"isAnswerKey":false,
  "id":"choiceInteraction_1-choice-A","label":"A","desc":"A\r\n"},{"isAnswerKey":false,
  "id":"choiceInteraction_1-choice-B","label":"B","desc":"B\r\n"},{"isAnswerKey":false,
  "id":"choiceInteraction_1-choice-C","label":"C","desc":"C\r\n"}]}]
```

Print an Item Alignment Crosswalk (Excel) Report

In certain banks, you can generate an Item Alignment Crosswalk report that contains information from across any ITS banks. This report is for use in downstream systems. Users who do not have access to this report can send a request to the Help Desk.

1. From the **Action Center** page ([Figure 201](#)), select **Customized Input File** and click **Generate Report**. The **Print Report** page appears.
2. From the *Choose the Report you Want to Print* section, select **Item Alignment Crosswalk (Excel)**.

- Using an XLSX template, create a customized input file, as shown in [Figure 245](#). Use the **Browse...** button to upload it.

Figure 245. Sample Item Alignment Crosswalk Report Input File

	A	B	C	D	E
1	Client	Item	PubId		
2	Texas	20244-1206	TX-RE-v5		
3	Texas	20244-1207	TX-RE-v5		
4	Texas	20244-1208	TX-RE-v5		
5	Texas	20244-1209	TX-RE-v5		
6	Texas	20244-1210	TX-RE-v5		
7	Texas	20244-442	TX-RE-v5		
8	Texas	20244-443	TX-RE-v5		
9	Texas	20244-448	TX-RE-v5		
10	Texas	20244-449	TX-RE-v5		
11	Texas	20244-450	TX-RE-v5		
12	Texas	20244-451	TX-RE-v5		
13	Texas	20244-452	TX-RE-v5		
14	Texas	20244-453	TX-RE-v5		

- From the *Print Selections* section, click **Create Report**. The Item Alignment Crosswalk report downloads or opens ([Figure 246](#)).

Figure 246. Sample Item Alignment Crosswalk Report

	A	B	C	D	E	F	G	H	I
1	Bank ID - Item ID	State	Pub Key	Standard Key (leaf level alignment)	Name				
2	20244-1206	Texas	TX-RE-v5	R 5.R.3 5.R.3.B	5.R.3.B				
3	20244-1207	Texas	TX-RE-v5	R 5.R.10 5.R.10.A	5.R.10.A				
4	20244-1208	Texas	TX-RE-v5	R 5.R.6 5.R.6.G	5.R.6.G				
5	20244-1209	Texas	TX-RE-v5	R 5.R.7 5.R.7.C	5.R.7.C				
6	20244-1210	Texas	TX-RE-v5	W 5.W.12 5.W.12.B	5.W.12.B				
7	20244-442	Texas	TX-RE-v5	R 3.R.10 3.R.10.D	3.R.10.D				
8	20244-443	Texas	TX-RE-v5	R 3.R.6 3.R.6.F	3.R.6.F				
9	20244-448	Texas	TX-RE-v5	R 3.R.7 3.R.7.C	3.R.7.C				
10	20244-449	Texas	TX-RE-v5	R 3.R.6 3.R.6.G	3.R.6.G				
11	20244-450	Texas	TX-RE-v5	R 4.R.6 4.R.6.C	4.R.6.C				
12	20244-451	Texas	TX-RE-v5	R 4.R.8 4.R.8.B	4.R.8.B				
13	20244-452	Texas	TX-RE-v5	R 4.R.7 4.R.7.C	4.R.7.C				
14	20244-453	Texas	TX-RE-v5	R 4.R.10 4.R.10.A	4.R.10.A				

Screenshot

This action type allows you to either web-preview or generate a PDF report of how the items will be presented in TDS, thus letting you web-preview items without an internet connection.

- Click **Screenshot**. The **Report** window appears.

Figure 247. Report Window

2. From the *Please select a language* dropdown list, select the language in which you wish to view the items. The dropdown lists all the languages in which the items are available. You can also select **All** to include the items in all available languages.
3. From the *Screenshot Type* dropdown list, select the item content that should be included. To include the latest item content, select **LatestContent**. To include content that has been web-approved, select **WebApproved**.
4. To include a log file containing item-stimulus associations, check the box for **Include associations**.
5. Click **Generate**. A ZIP file containing the report is generated.

On Demand Screenshot

This action type allows you to generate a PDF report of how the items will be presented in TDS.

1. Click **On Demand Screenshot**. The *Screenshot Report* window appears.

Figure 248. Screenshot Report Window

2. From the *Please select a language* dropdown list, select the language in which you wish to view the items. The dropdown lists all the languages in which the items are available. You can also select **All** to include the items in all available languages.

- From the *Screenshot Types* dropdown list, select the item content that should be included. To include the latest item content, select **LatestContent**. To include content that has been web-approved, select **WebApprove**.
- To include a log file containing item-stimuli associations, check the box for *Include association*.
- Click **Generate**. A message is displayed to indicate that your request has been submitted.

Custom Report

This action type enables you to generate custom reports of the selected items, such as bookmaps and item keys, summary tables, and review logs.

- Click **Custom Report**. The *Custom Reports* window appears.

Figure 249. Custom Reports Window

Custom Reports

Please select a custom report:

- SBAC Pilot Bookmap
- SBAC_14ReviewLog
- SBAC Custom SummaryTable: Math
- SBAC Custom SummaryTable: ELA
- SBAC_Pilot Key File
- scanner

Generate

- Select the appropriate radio button to specify the report you want to generate. The options available may vary from one bank to another. Examples of some reports are Keyfile, Bookmap, Review Log, and Summary Table.
- Click **Generate**. A ZIP file containing the report is generated.

Figure 250. Sample Bookmap Report

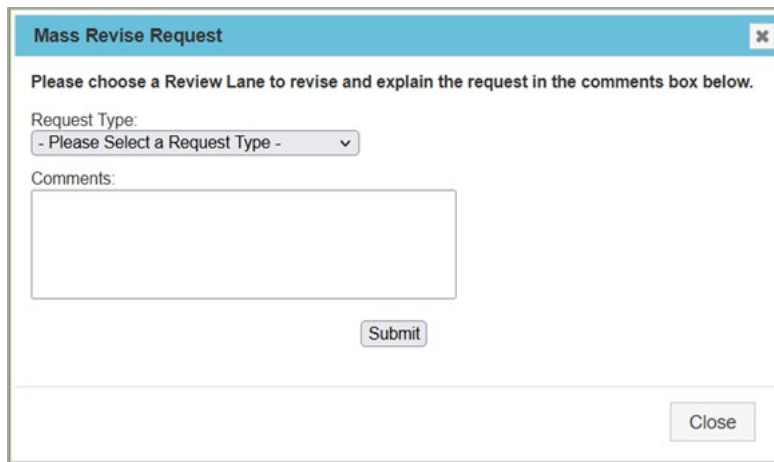
	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Test	Test Grade	TestSubject	ITS ID	Form	Role	Item Position	Book Position	Answer Key	Numeric Key	AIR Item Format	Point Value	DOK	Cognitive Level
2			ELPA21	56					QTI		QTI			
3			ELPA21	76					B	2	MC4	1 pt.		
4			ELPA21	78					QTI		QTI			
5			ELPA21	248					QTI		QTI			

Mass Revise Request

From the Action Center, you can submit a revise request for multiple items or stimuli simultaneously. These requests ask revision administrators to unlock a particular review lane for a set of items or stimuli. You and those users can view those requests as described in [Viewing Pending Requests](#). As with individual revise requests, you can only submit requests about items/stimuli and review lanes that are available for revision by your current role. For information on submitting individual revise requests, refer to [Editing and Revising an Item or Stimulus](#).

1. Create a text file (TXT) with no header, listing the IDs of the items or stimuli you want to submit a request for. Do not include any spaces after the last ID. To upload, select the entity type and click **Browse...**
2. Click to open the **Requests** or **Admin** section on the left (depending on your role) and click **Mass Revise Request**. The **Mass Revise Request** window appears ([Figure 251](#)).

Figure 251. Mass Revise Request Window



3. From the *Request Type* dropdown list, select a review lane.
4. Enter a comment explaining why you are changing the statuses of these items or stimuli.
5. Click **Submit**. The **Mass Revise Request Result** window appears ([Figure 252](#)), listing all successful submissions and/or failures. Review them and close the window.

These results are also sent to the email address associated with your login.

Figure 252. Mass Revise Request Result Window



If necessary, edit the text file and try again.

Item Inventory

Item Inventory enables you to view the items that exist in ITS. To generate an Item Inventory Report:

1. From the *Report* menu in the banner, select **Item Inventory**. The *Item Inventory* page appears.

Figure 253. Item Inventory Page

The screenshot shows the 'Item Search' interface. On the left, there's a sidebar with 'Item Search' and 'Criteria' sections. The 'Criteria' section shows 'Entity Type: Item' and 'Subject: Reading'. The main area has a 'Columns' section with 'Items Search' and 'Review Status*' dropdowns. Below that is a 'Rows' section with 'Reviewer', 'IAT Content', and 'Share/Clone Info' dropdowns. The 'Share/Clone Info' section includes 'Shared From', 'Shared To', 'Cloned From', and 'Cloned To' dropdowns, all currently set to '--None--'.

2. In the *Column(s)* section, make your selections, including one or more review statuses. Each of the selected review statuses is displayed in a separate column on the report.
3. Select additional item attributes that you wish to include in the report from the respective fields in the *Row(s)* section. You can select multiple values for each attribute. Each of the selected attributes is displayed in a separate row on the report.
4. Click **View Report**. An *Item Inventory Report* window appears, displaying the report as in [Figure 254](#).

Figure 254. Item Inventory Report Window

Item Inventory Report - ELPA21									
Output: 'EITHER of Selections' Report									
			Review Status						
Att Name	Att Value	Total Per/Value	Preliminary Review	Editorial Review	Senior Content Review	AIR Web Approval	Locked Operational Pool	Rejected Status	Not Submit Status
Total Per/Review Status			0	0	2	0	81	1	5
Total In DB	89								

Features of the Item Inventory Report

- The report is displayed in a tabular format and the EITHER of Selections table displays the items that match any of the selected criteria.
- Each of the selected review statuses is displayed in a separate column and each of the selected attributes in a separate row.
- The report displays the number of items that match the selected criteria as well as the total number of items existing in the item bank.

Stimulus Inventory

Similar to **Item Inventory**, **Stimulus Inventory** enables you to view the stimuli that exist in ITS.

From the *Report* menu in the banner, select **Stimulus Inventory**. The **Stimulus Inventory** page appears ([Figure 255](#)). When you follow steps 2–4 in [Item Inventory](#), the **Stimulus Inventory Report** window appears, displaying the report ([Figure 256](#)).

Figure 255. Stimulus Inventory Page

Stimulus Search	
<div style="border: 1px solid #ccc; padding: 5px;"> Actions <input type="button" value="View Report"/> <input type="button" value="Reset"/> </div>	
<div style="border: 1px solid #ccc; padding: 5px;"> Criteria You are searching the Item Bank based on: Subject: ELPA21 </div>	
<div style="border: 1px solid #ccc; padding: 5px;"> Columns <div style="border: 1px solid #ccc; padding: 5px;"> Stimuli Search Subject: ELPA21 Review Status* Stimulus: Preliminary Review Stimulus: Editorial Review Stimulus: Senior Content Review </div> </div>	
<div style="border: 1px solid #ccc; padding: 5px;"> Rows <div style="border: 1px solid #ccc; padding: 5px;"> Reviewer Reviewer Aaron Newman Adrienne Freed Alden Michels </div> </div>	

Figure 256. Stimulus Inventory Report Window

Stimulus Inventory Report - ELPA21							
Output: 'EITHER of Selections' Report							
			Review Status				
Att Name	Att Value	Total Per/Value	Stimulus: Preliminary Review	Stimulus: Editorial Review	Stimulus: Senior Content Review	Stimulus: AIR Web Approval	Stimulus: Locked Operational Pool
Vendor	AIR	2	0	0	0	0	0
Vendor	Educators	0	0	0	0	0	0
Total Per/Review Status			0	0	1	2	28
Total In DB	33						

Features of the Stimulus Inventory Report

- The report is displayed in a tabular format and the EITHER of Selections table displays the stimuli that match any of the selected criteria.
- Each of the selected review statuses is displayed in a separate column and each of the selected attributes in a separate row.
- The report displays the number of stimuli that match the selected criteria as well as the total number of stimuli existing in the item bank.

Managing Content Standard Publications

A content standard is a broad statement that defines the knowledge, concepts, and skills that students should acquire at each grade level. A SOCK (standing for Some Other Category of Knowledge) is similar to a standard. ITS uses content standards and SOCKs, where applicable, to align items and create test blueprints, which are then used by TDS to select items on adaptive tests.

You can manage content standards and SOCKs in ITS using the link that appears when you hover over the *Master Admin* menu in the banner.

This section describes how to do the following:

- [View and Edit a Content Standard Publication](#)
- [Create a Content Standard Publication](#)
- [Mass-Upload Publication Content Standards and SOCKs](#)
- [Add a Content Standard or SOCK](#)
- [Edit a Content Standard or SOCK](#)
- [Edit a SOCK's Standards or Search Criteria](#)
- [Select Banks for a SOCK](#)
- [Delete a Content Standard or SOCK](#)

View and Edit a Content Standard Publication

You can view existing content standard publications. You can also manually edit the categories or tree levels specified for a publication.

You can also mass-upload standards and/or SOCKs for an existing publication using an Excel spreadsheet. For more information, refer to [Mass-Upload Publication Content Standards and SOCKs](#).

To view and edit a content standard publication:

1. From the *Master Admin* menu in the banner, select **Manage Standards Repository Publications**. The **Manage Content Standards Repository with ITS** page appears ([Figure 257](#)).

Figure 257. Manage Content Standards Repository with ITS Page: Standards Tab

Manage Content Standards Repository with ITS

Publication: Export to Excel | Mass upload Excel | Show banks using this Publication | Create a new publication

Standards | SOCKS

Filter: Name Filter... Hide unmatched nodes Expand All Collapse All Add New Edit Publication Categories (Tree Levels)

Name	lvl	pubkey	ShortName	Description	Grade	Actions
▶ LISTENING	1	G1.L	G1.L	Listening	1	Edit
▶ READING	1	G1.R	G1.R	READING	1	Edit
▶ SPEAKING	1	G1.S	G1.S	SPEAKING	1	Edit
▶ WRITING	1	G1.W	G1.W	WRITING	1	Edit
▶ LISTENING	1	G2-3.L	G2-3.L	LISTENING	2, 3	Edit
▶ READING	1	G2-3.R	G2-3.R	READING	2, 3	Edit
▶ SPEAKING	1	G2-3.S	G2-3.S	SPEAKING	2, 3	Edit
▶ WRITING	1	G2-3.W	G2-3.W	WRITING	2, 3	Edit

Figure 258. Manage Content Standards Repository with ITS Page: SOCKS Tab

Manage Content Standards Repository with ITS

Publication: Save Description

Description: Export to Excel | Mass upload Excel | Show banks using this Publication | Create a new publication

Standards | SOCKS

SOCK update in progress. Processing 1 updates for 0 item(s) after changes to SOCKS.

Filter: Name Filter... Hide unmatched nodes Expand All Collapse All Add New Scan and fix bank SOCKS

Name	M	pubkey	Description	Used for Administration	Used for Reporting	Standards	Search Criteria	Banks	Permit Override	Actions
▶ Sock 123	1	1	test updated	<input type="checkbox"/>	<input type="checkbox"/>		1. ELA 2. ELA2 3. ELA 88	100185	<input checked="" type="checkbox"/>	Edit Edit Standards Edit Criteria Edit Banks
▶ AnotherSock3	1	3	AnotherSock3 test	<input type="checkbox"/>	<input checked="" type="checkbox"/>			10013, 100185	<input checked="" type="checkbox"/>	Edit Edit Standards Edit Criteria

- From the *Publication* dropdown list, which displays the publications used by the item bank, select the publication. The content standards and SOCKs constituting the publication are displayed in the **Standards** and **SOCKS** tabs (Figure 257 and Figure 258). Table 11 describes the columns of the content standards and SOCKs tables.
 - You can click some of the column headers to sort the data in ascending order. An arrow is displayed in the header for the column that has been sorted.
- To view child entities, do one of the following:
 - To view the child entities of a content standard or SOCK, click ▶ beside it.

- To view content standards or SOCKs for all the levels, click **Expand All**. To collapse the hierarchy and view only the Level 1 content standards or SOCKs, click **Collapse All**.
4. *Optional*: To search for specific content standards or SOCKs, do the following:
 - a. From the *Filter* dropdown list, select the content standard or SOCKs attribute that you wish to search by.
 - b. Next, in the adjacent text box, enter the search term. The content standards or SOCKs are automatically filtered to display the records that match the search criteria. If only a child entity matches the search criteria, the parent entity is displayed but is grayed out.
 - To continue to display the content standards or SOCKs that did not match the search criteria on the page, clear the checkbox **Hide Unmatched Nodes**. The unmatched content standards or SOCKs are grayed out.
 - To clear the search, click **x**.
 5. *Optional*: To export the publication to an Excel file, click **Export to Excel**.
 6. *Optional*: To view the banks that are associated with the publication, click **Show Banks using this Publication**. A *List of banks associated with publication* window ([Figure 259](#)) appears, displaying the item bank list.

Figure 259. List of Banks Associated with Publication Window

Key	Bank Name	Subject Name
231	Quality Assurance	ELA
234	ELPA 21 Practice	ELPA21
236	ELPA 21 Assessment	ELPA21
244	Quality Assurance IAT	test
10013	Quality Assurance IAT Encryption	test
100184	Quality Assurance IAT UAT	test
100185	Quality Assurance IAT Encryption UAT	test
100186	Quality Assurance UAT	ELA

7. *Optional*: To edit the categories or tree levels used by the publication, do the following:
- Click **Edit Publication Categories (Tree Levels)**, which is displayed when the **Standards** tab is selected. An **Update csr Category(ies) with publication** window ([Figure 260](#)) appears, displaying the categories specified for the publication.

Figure 260. Update CSR Category(ies) with Publication Window

Tree Level	Name	
1	Domain	Delete
2	Standard	Delete
3	Sub claim	Delete
4	Knowledge/Proficiency	Delete
5	Expected Performance	Delete

- To edit a category name, enter the new name in the *Name* field and click **Save**. A message appears, asking you to verify that you wish to make the update. If you click **OK**, a confirmation message is displayed once the name is successfully updated.
- To add a new category, click **Add a category**. Enter the name for the category in the new row that appears and click **Save**. A message appears, asking you to verify that you wish to make the updates. If you click **OK**, a confirmation message is displayed once the category is successfully added.
- To delete a category, click the **Delete** button beside the category. A confirmation message appears. Click **OK** and then click **Save**. Another message appears, asking you to verify that you wish to delete the category. If you click **OK**, a confirmation message is displayed once the category is successfully deleted.

You can only delete categories that are not currently in use. If a category is being used by a publication, that is, if a content standard exists for a category, then the **Delete** button is disabled for that category.

In the **SOCKS** tab, you can use the **Scan and fix bank SOCKS** button to ensure that all items are aligned to the correct SOCKS, in case a database change has altered their alignments incorrectly.

[Table 11](#) describes the columns in the **Standards** and **SOCKS** tabs.

Table 11. Standards and SOCKS Tabs Columns

Column Name	Description
Name*	The content standard/benchmark name or SOCK name as applicable. For example, Listening, Reading, and K.II.E.1.
Lvl*	A positive non-zero integer that indicates the level or position of the content standard or SOCK in the hierarchy. For example, 1 indicates content standard level 1, 2 indicates content standard level 2, and so on. This integer cannot be edited once you have started creating a standard or SOCK.
PubKey*	A pipe-delimited key value that is unique to the content standard or SOCK. All content standard and SOCK levels must have an identifiable parent key. An example of PubKeys at different levels: <ul style="list-style-type: none"> • Level 1: ELA III • Level 2: ELA III B • Level 3: ELA III B 2 • Level 4: ELA III B 2 2
ShortName	Only available for content standards. An abbreviated description of the content standard that may include the name, grade, and level. For example, G1.L for Grade 1 Listening Level 1 content standard.
Description	The text of the standard or SOCK as published by the client.
Used for Administration	Only available for SOCKs. This checkbox is currently not used and has no effect.
Used for Reporting	Only available for SOCKs. When this checkbox is selected, the SOCK will be used for reporting purposes.
Standards	Only available for SOCKs. Defines the SOCK based on standards. All items that are aligned to any of the standards listed will also be aligned to the SOCK. This column can be edited using the instructions in Edit a SOCK's Standards .
Search Criteria	Only available for SOCKs. Defines the SOCK based on an item search query. All items matching the query will be aligned to the SOCK. This column can be edited using the instructions in Edit a SOCK's Search Criteria .
Permit Override	Only available for SOCKs. When this checkbox is selected, it allows you to override the standards or search criteria specified above, so that you can manually include or exclude the SOCK in a specific item's rubric using the IAT Editor.
Grade*	Only available for content standards. The grade(s) for which the content standard is applicable. It can be a single grade or a comma-delimited list of grades.

**Required field*

Create a Content Standard Publication

You can create new content standards publications manually.

You can also mass-upload standards and/or SOCKs for a new publication using an Excel spreadsheet. For more information, refer to [Mass-Upload Publication Content Standards and SOCKs](#).

1. On the **Manage Content Standards Repository with ITS** page ([Figure 257](#)), click **Create a new publication**. The **Create a new publication** window appears ([Figure 261](#)).

Figure 261. Create a New Publication Pop-Up Window

2. In the *Description* field, enter the publication name. This is the name that will be displayed along with the publication key in the *Publication* dropdown list on the **Manage Content Standards Repository with ITS** page.
3. From the *Publisher* dropdown list, which displays the names of existing clients, select the client associated with the publication.
4. From the *Subject* dropdown list, which displays the names of subjects created in ITS, select the subject associated with the publication.
 - If the required subject does not exist, add the subject as follows:
 - i. Click **Add new subject**. A **Create a new CSR subject** window appears.

Figure 262. Create a New CSR Subject Window

- ii. In the *Key* field, enter a key that will be used to identify the subject.
 - iii. In the *Name* field, enter the subject name.
 - iv. Click **Save**. A message appears, asking if you wish to continue saving the subject.
 - v. Click **OK** to confirm. A message appears, indicating that the subject has been saved successfully.
 - vi. Click **OK** to close the message. *The new publication will have this Key which is auto-generated* field displays the subject key.
5. From the *Subject from the current bank that new publication will be used for* dropdown list, select the subject from the current bank that the publication is associated with.
 6. From the *Cardinality* and *Required level* dropdown lists, select the appropriate values.
 7. Click **Save**. A message appears asking if you wish to continue saving the publication.
 8. Click **OK** to confirm. A message appears, indicating that the publication has saved successfully.
 9. Click **OK** to close the message. The new publication displays on the **Manage Content Standards Repository with ITS** page. You can add the content standards and/or SOCKs for the publication by following the directions in the [Add a Content Standard or SOCK](#) or [Mass-Upload Publication Content Standards and SOCKs](#) sections.

Mass-Upload Publication Content Standards and SOCKs

Since a content standards publication may consist of many content standards and SOCKs, it may be easier to upload all the content standards and SOCKs instead of manually adding them one at a time. You can do this to create a new publication or to update one that already exists.

If an update to an existing publication lacks one of the existing standards, that standard will be deleted unless it is in use (that is, associated with an item). If such a standard is in use, the file

will not load successfully. If an update to an existing publication lacks one of the existing SOCKs, that SOCK will always be deleted.

1. On the **Manage Content Standards Repository with ITS** page ([Figure 257](#)), click **Mass upload Excel**. The **Mass CSR Update** window appears ([Figure 263](#)).

Figure 263. Mass CSR Update Window

2. To download a sample CSR upload template, click **Download**. An Excel (XLSX) spreadsheet ([Figure 264](#)) downloads or opens, depending on your browser.

Figure 264. Sample CSR Template

	A	B	C	D	E	F	Formula Bar	H	I	J	K	L	M	N
1	Category	TreeLevel												
2	Domain	1												
3	Cluster	2												
4	Standard	3												
5														
6														
7														
8														
9														

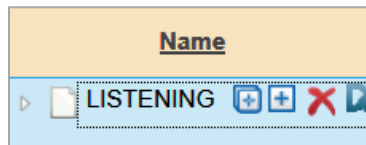
3. Fill out each worksheet of the template as applicable and save the file to your computer. For example, in the **Categories** worksheet, enter the hierarchical levels that will be available and enter the corresponding standards in the **Standards** worksheet.
4. Click **Browse** and select the file you created in the previous step.

5. *Optional:* If you wish to associate the content standards publication (either new or existing) with a specific subject in the item bank, do the following:
 - a. Mark the checkbox for **Associate new CSR Publication to a subject in this bank**.
 - b. In the additional fields that display, specify the subject and other required values.
6. Click **Update**. A message appears, asking you to verify that you wish to upload the content standards publication.
7. Click **OK**. A message appears, indicating whether the file loaded successfully or failed.

Add a Content Standard or SOCK

1. Select either the **Standards** tab or the **SOCKS** tab.
2. To add a new Level 1 standard or SOCK, click **Add New** ([Figure 257](#)) and skip to step [4](#).
3. To add a standard or SOCK at any level, hover over the name of the standard/SOCK for which you wish to add a child or sibling. Additional action buttons appear ([Figure 265](#)).

Figure 265. Content Standard Action Icons



Do one of the following:



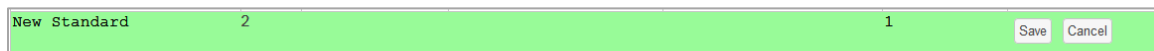
- To add a content standard/SOCK at the same level (that is, a sibling), click .
 - To add a content standard at the level below (that is, a child), click . Child SOCKs are supported but not used.
4. Using [Table 11](#) as a reference, enter the field values for the new standard or SOCK row that is displayed at the specified level.

Figure 266. Content Standard Row



5. Click **Save**. A window appears, displaying the row you added, along with its parent, if applicable.

Figure 267. Save Changes Window for Content Standard

Please confirm your changes and click next to continue:

Name	lvi	pubkey	ShortName	Description	Grade	Actions
LISTENING	1	G1.L	G1.L	ELPA21 Standards	1	
New Standard	2	G1.LJ3	G1.LJ3	ELPA21 Standards	1	

Next cancel

6. To continue, click **Next**. ITS validates the additions to ensure no validation issues are generated.
7. If validation issues are generated, the issues are listed in the pop-up window. Fix any errors and click **Next**. ITS presents the items or tests affected by the additions.
8. To continue saving the new standard or SOCK, click **Save**. A confirmation message appears, indicating that the standard or SOCK has been successfully added. Click **OK**.

To edit a SOCK's standards or search criteria, follow the instructions in [Edit a SOCK's Standards or Search Criteria](#).

Edit a Content Standard or SOCK

The following instructions tell you how to edit most characteristics of a SOCK, but to edit a SOCK's standards or search criteria, follow the instructions in [Edit a SOCK's Standards or Search Criteria](#).


1. In the Actions column ([Figure 257](#)) of the standard or SOCK you wish to edit, click **Edit**. Alternatively, click  ([Figure 265](#)), which appears when you hover over the name of the standard/SOCK, to enable editing.
2. Either use the checkboxes or place your cursor in any text field you wish to update and make modifications as necessary. If a text field is editable, placing your cursor in the field causes it to display a red border. [Table 11](#) describes each column.

Figure 268. Manage Content Standards Repository with ITS Page: Standards Tab: Content Standard Row

Name	lvl	pubkey	ShortName	Description	Grade	Actions
L	1	L		Language Standards	1, 10, 11, 12, 2, 3, 4, 5, 6,	Cancel
<input type="checkbox"/> NoAlignment	1	NoAlignment	NoAlignment	Not aligned to any standard in this publication	1, 10, 11, 12, 2, 3, 4, 5, 6, 7, 8, 9, K, KG	
<input type="checkbox"/> RF	1	RF		Reading Standards: Foundational Skills	1, 2, 3, 4, 5, KG	
<input type="checkbox"/> RI	1	RI		Reading Standards for Informational Text	1, 10, 11, 12, 2, 3, 4, 5, 6, 7, 8, 9, KG	
<input type="checkbox"/> RL	1	RL		Reading Standards for Literature	1, 10, 11, 12, 2, 3, 4, 5, 6, 7, 8, 9, KG	
<input type="checkbox"/> SL	1	SL		Speaking and Listening Standards	1, 10, 11, 12, 2, 3, 4, 5, 6, 7, 8, 9, KG	
<input type="checkbox"/> UD_ELA1	1	UD_ELA1		Undesignated_ELA	1, 10, 11, 12, 2, 3, 4, 5, 6, 7, 8, 9, KG	
<input type="checkbox"/> W	1	W		Writing Standards	1, 10, 11, 12, 2, 3, 4, 5, 6, 7, 8, 9, KG	

3. If you edited a text field, click outside of it to make the **Save** button appear. Click **Save**. A window appears, displaying the updates you have made.
4. To continue, click **Next**. ITS validates the updates to ensure no validation issues are generated.
5. If validation issues are generated, the issues are listed in the window. Fix the errors, if applicable, and click **Next**. ITS presents the items or tests affected by the updates.
6. To continue saving your updates, click **Save**. A confirmation message appears, indicating that the standard or SOCK has been successfully updated. Click **OK**.

Edit a SOCK's Standards or Search Criteria

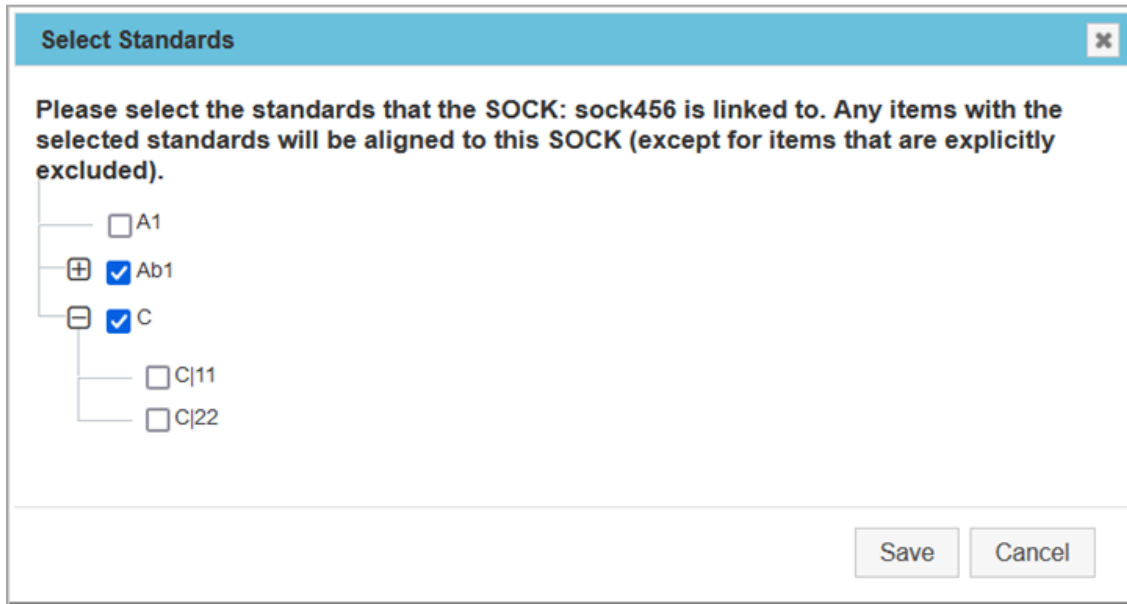
A SOCK is defined by the standards or search criteria that determine which items are aligned to it. You can add either standards or search criteria to a SOCK, but not both.

Also, you can use the **Scan and fix bank SOCKs** button to ensure that all items are aligned to the correct SOCKs, in case a database change has changed their alignments incorrectly.

Edit a SOCK's Standards

1. In the **SOCKS** tab, click the **Edit Standards** button beside the SOCK.
2. In the **Select Standards** window that appears ([Figure 269](#)), select and/or clear standard checkboxes. You can expand a standard to display its children by clicking .

Figure 269. Select Standards Window



3. Click **Save**.

Edit a SOCK's Search Criteria

1. In the **SOCKS** tab, click the **Edit Criteria** button beside the SOCK.
2. In the **Edit Search Criteria** window that appears, do one or more of the following:
 - To add a new set of criteria, click **Add**. The **Sock Search Criteria** window appears. It resembles the **Item Search** window. After searching as described in [Searching for an Item or Stimulus](#), click **Save SOCK Criteria**. In the pop-up that appears, enter a name for the set of criteria and click **OK**.
 - To edit an existing set of criteria without changing its name, click **Edit Criteria**. Change the criteria as described above. Click **Save SOCK Criteria**.
 - To rename a set of criteria, click **Rename Criteria**. In the pop-up that appears, enter the new name and click **OK**.
 - To delete a set of criteria, click **Delete Criteria**. In the confirmation pop-up, click **OK**.

Figure 270. Edit Search Criteria Window

Edit Search Criteria [Close]

Search Criteria for SOCK: Sock 123:
Any items matching any of the Search Criteria will get this SOCK.

1.ELA
Subject: ELA
Pending status: All items in selected status
LOE:1
Grade:7

[Edit Criteria] [Rename Criteria] [Delete Criteria]

2.ELA2
Subject: ELA
Pending status: All items in selected status
Grade:9, 10

[Edit Criteria] [Rename Criteria] [Delete Criteria]

3.ELA 88
Subject: ELA
Pending status: All items in selected status
IAT Max Score:8

[Edit Criteria] [Rename Criteria] [Delete Criteria]

[Add] [Close]

3. In the **Edit Search Criteria** window, click **Close**.

Select Banks for a SOCK

By default, each SOCK is available only to the bank in which it was created. You can select different banks for it to belong to.

1. In the **SOCKS** tab, select the **Edit Banks** button beside the SOCK. The **Select Banks** window appears, listing all the banks in which the publication is used.

To change the banks in which the publication is used, log in as an administrator with access to the *Admin* menu, select the **Manage Subjects** option, and use the **CSR Associations** controls.

2. Select banks from the list. You can use **Add All** or **Remove All** to select or clear all checkboxes.
3. Select **Save**.

The selected banks are the only ones in which the SOCK will be available. Note that the choice of bank is a separate setting from any standards, search criteria, or **Permit Override** setting on the SOCK. A SOCK's bank setting is not overridden by the **Permit Override** setting.

Delete a Content Standard or SOCK

Deleting a standard or SOCK also deletes any child standards/SOCKs under it.


1. Click , which appears when you hover over the name of the standard or SOCK that you wish to delete. The standard/SOCK is displayed with a strikethrough, as in [Figure 271](#).

Figure 271. Content Standard Row

Name	Ivl	pubkey	ShortName	Description	Grade	Actions
LISTENING		G1-L	G1-L	ELPA21-Standards	1	Save - Cancel

2. In the Actions column, click **Save**. A window appears, displaying the row(s) that you are about to delete.
3. To continue, click **Next**. ITS validates the updates to ensure no validation issues are generated.
4. If validation issues are generated, the issues are listed in the window. Fix any errors and click **Next**. ITS presents the items or tests affected by the deletion.
5. To continue deleting, click **Save**. A confirmation message appears, indicating that the standard(s) or SOCK(s) have been successfully deleted.

Managing Animation Requests

You can manage animation and simulation requests that are submitted in ITS using the links that appear when you hover over the *Animation* menu in the banner.

When creating an item or stimulus, the writer can submit a request to create an animation or simulation for the item or stimulus.

For information on how to submit and follow up on requests, please refer to [IAT Documentation](#) in the [Managing Items and Stimuli](#) section.

To view and complete the submitted requests:

1. From the *Animation* menu in the banner, select **Admin**. The animation admin page appears, listing the animation and simulation requests ([Figure 272](#)).

Note that while an item writer or stimuli writer can only submit requests for one item bank at a time, this page lists the requests submitted for all item banks to facilitate easier management of the requests.

Figure 272. Animation Admin Page

ITS BANK	ITS Entity	Requested By	Request Name	Request Date	Request Type	Request Status	Action
IAT Sandbox	Item 3	Jane_Doe	AnimationRequest1	2018-08-30 11:50:08	Animation	New	Details
IAT Sandbox	Item 45	John_Smith	AnimationRequest1	2018-09-13 13:59:22	Animation	New	Details
IAT Sandbox	Item 350	John_Smith	AnimationRequest1	2018-08-30 12:48:31	Animation	New	Details
IAT Sandbox	Item 17890	Suzanne_Delage	AnimationRequest1	2019-12-16 14:37:44	Animation	New	Details
IAT Sandbox	Item 17890	Suzanne_Delage	SimulationRequest2	2019-12-16 10:13:20	Simulation	New	Details
IAT Sandbox	Item 18150	Parson_Porlock	AnimationRequest1	2019-09-13 12:06:04	Animation	New	Details
IAT Sandbox	Item 18150	Parson_Porlock	SimulationRequest2	2019-09-27 14:57:20	Simulation	New	Details
IAT Sandbox	Stimulus 159	John_Doe	AnimationRequest1	2020-04-16 16:18:45	Animation	New	Details

Showing 1 to 8 of 8 entries (filtered from 525 total entries)

2. To view the request details, in the Action column, click **Details**. The request details page appears.

Figure 273. Request Details Page

Animation request

Master Record

ITS Bank	ItsEntity Type	ItsEntity Key	Request By	Request Name	Request Date	Status
IAT Sandbox	Item	3	Jane_Doe	AnimationRequest1	8/30/2018 11:50:08 AM	New

Animation Attributes

Width: Height:

Animation Upload

Upload Html file: No file selected.

Comments

Files History

Poster Upload

Upload Poster image: No file selected.

Files History

External JS libraries:

Default selected Referenced JS libraries Name:

- easeljs-0.8.2.min.js
- easeljs-0.6.0.min.js
- tweenjs-0.4.0.min.js
- movieclip-0.6.0.min.js
- animationController.js

^

easeljs-0.6.0.min.js
 tweenjs-0.4.0.min.js
 tweenjs-0.6.2.min.js
 movieclip-0.6.0.min.js
 movieclip-0.8.1.min.js
 createjs.min.js
 animationController.js
 animationControllerv1.js v

Multiple select with **Ctrl** or **Shift**
 No need to change this part if you want to keep the current default settings

3. Create the animation or simulation requested in the following manner:
 - a. In the *Animation Attributes* section, enter the animation or simulation attributes (such as width, height, and language). The available attributes vary depending on whether it is an animation or a simulation request.
 - b. Click **Save** to save the attributes.
 - c. To upload an HTML file or a poster image, do the following:
 - i. From the *Animation Upload* or *Poster Upload* sections, click **Browse** and select the required file.
 - ii. Click **Upload Animation** or **Upload Poster** as applicable to upload the file and complete the request. A message appears, indicating whether the file has been successfully uploaded.
 - iii. Click **OK** to close the message and return to the *New/Rejected* page to work on a different request. Alternatively, continue to step [4](#) to view or edit the completed request and submit it for review.



Note: Once a request is completed, a notification is sent to the item writer or stimuli writer, who can then view the animation or simulation from the respective item or stimulus page and approve or reject the file.

4. To view or edit the completed request, do the following:
 - a. Click the **Completed/Under Review** tab. The **Completed/Under Review** page appears, displaying the requests that have been completed or are under review.

Figure 274. Completed/Under Review Page

New/Rejected		Completed/Under Review		Approved				
Completed/Under Review								
Show 10		entries		Search: <input type="text"/>				
ITS BANK	ITS Entity	Requested By	Request Name	Request Date	Request Type	Request Status	Latest Version	Action
AIR Hard to Measure IAT	Item 237	Yang_Sun	SimulationRequest1	4/17/2018	Simulation	Completed	1	View Edit
Showing 1 to 1 of 1 entries								

- b. To edit the completed request, in the Action column, click **Edit**. The request details window appears. The existing attributes are displayed, and the previously uploaded files are listed in the *Files History* section ([Figure 275](#)).
 - Update the attributes or upload new files as necessary in the same process described above.

Figure 275. Request Details Window for a Completed Request

Animations request

Master Record						
ITS Bank	ItsEntity Type	ItsEntity Key	Request By	Request Name	Request Date	Status
AIR Hard to Measure IAT	Item	237	Yang_Sun	SimulationRequest1	4/17/2018 5:16:26 PM	Completed

Review Records

Demo_User : Pend
9/26/2018 3:54:27 PM
Upload simulation file FD_Report_TestMode.PNG as version 1

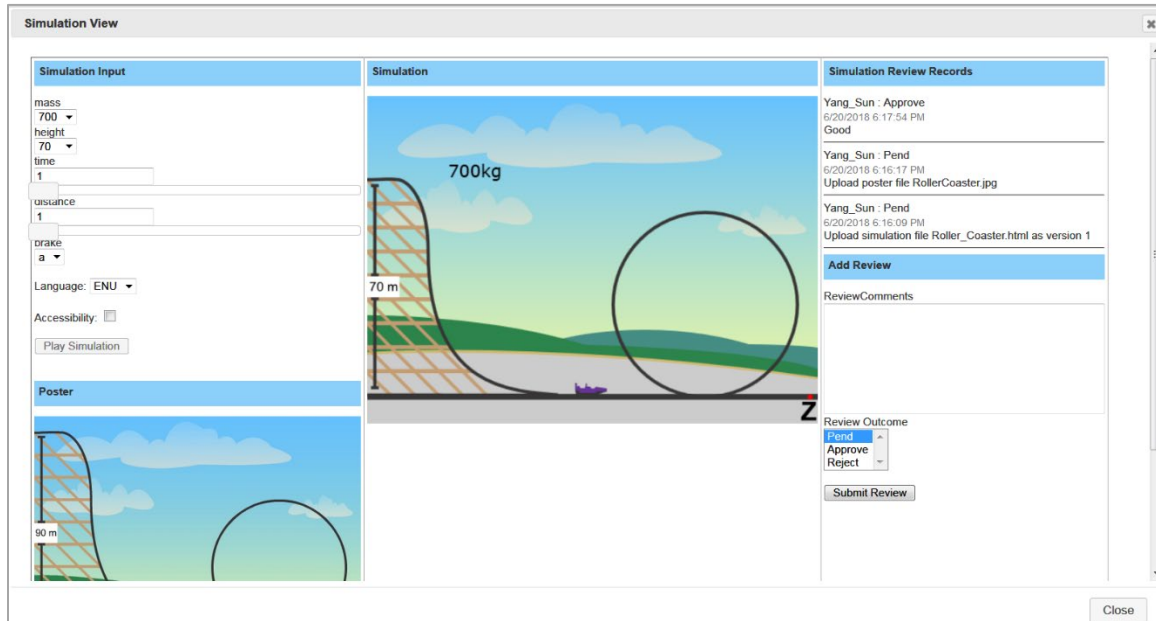
Animation Attributes	Animation Upload	Poster Upload
Width: <input type="text"/> Height: <input type="text"/> Language: <input type="text"/> Behavior: <input type="text"/> Interactive <input type="text"/> Timeline <input type="text"/> Static <input type="button" value="Add Input"/> Outputs: <input type="text"/> <input type="button" value="Save"/>	Upload Html file: <input type="button" value="Browse..."/> No file selected. Comments <div style="border: 1px solid gray; height: 100px; width: 100%;"></div> <input type="button" value="Upload Animation"/>	Upload Poster image: <input type="button" value="Browse..."/> No file selected. <input type="button" value="Upload Poster"/>
Files History FD_Report_TestMode.PNG Version: 1 Download		

[Back to List](#)

- c. To review the file, in the Action column of the required request, click **View**. The **Animation View** or **Simulation View** window appears.

Note that the same window is displayed to the item writer or simulation writer from the item or stimulus page.

Figure 276, Simulation View Window



- d. View the animation or enter simulation parameters and click **Play Simulation** to play the simulation, as applicable.
- e. To submit a review, do the following:
- i. In the *Review Comments* field, enter review comments.
 - ii. Next, from the *Review Outcome* dropdown list, select the desired review outcome.
 - iii. Click **Submit Review**.
 - If the file is rejected, the request will again be listed on the **New/Rejected** page.
 - If the file is approved, the request is listed on the **Approved** page. No further edits can be made for the file. If edits are required, a new request needs to be submitted.

Figure 277. Approved Page

New/Rejected		Completed/Under Review		Approved				
Approved				Search: <input type="text"/>				
Show 10 entries								
ITS BANK ▲	ITS Entity ↕	Requested By ↕	Request Name ↕	Request Date ↕	Request Type ↕	Request Status ↕	Latest Version ↕	Action ↕
Arizona Assessment IAT	Item 1	Yang_Sun	SimulationRequest1	6/20/2018	Simulation	Approved	1	View
Arizona Assessment IAT	Item 24	Alfred_Osei Nti	AnimationRequest1	6/21/2018	Animation	Approved	3	View
Arizona Assessment IAT	Item 25	Alfred_Osei Nti	AnimationRequest1	6/21/2018	Animation	Approved	1	View
Showing 1 to 3 of 3 entries								

Appendix A. Glossary

Some of the terms used in ITS and in this document are defined below.

Term	Definition
Affinity Group	<p>A type of blueprint element similar to a standard or SOCK. It is used to group items together in an ad hoc fashion based on search criteria if the grouping cannot be accomplished by using a standard or SOCK.</p> <ul style="list-style-type: none"> • An affinity group, unlike a SOCK, is always used for test administration. • An affinity group may optionally be used for reporting. • Whereas standards are nested in a standard hierarchy in a Content Standards Repository (CSR), affinity groups do not belong to the hierarchy.
Association	The link connecting an item and a stimulus, or connecting two items.
Attributes	Characteristics of an item or stimulus, such as description and standard.
Benchmark	A standard or set of standards, used as a point of reference for evaluating performance or level of quality. Benchmarks are statements that describe concrete learning outcomes.
Blueprint	A set of requirements for a test form. It specifies the minimum and maximum number of total items and field test items that will appear on the form, along with other test form attributes.
Blueprint Element	<p>Alignment used in a blueprint. There are three types of blueprint elements:</p> <ul style="list-style-type: none"> • Standard • SOCK • Affinity group
Cloze	Based on or being a test of reading comprehension in which the test taker is asked to supply words that have been systematically deleted from a text.
Computerized Adaptive Test	Abbreviated CAT. Also known as a computer-adaptive test or an adaptive test. A test that presents different items and stimuli depending on the student's responses.
Content Level	A blueprint element representing a standard and allowing the standard to be used for the administration and/or reporting of a test.
Entity	An item or stimulus that is presented to a student in an assessment.

Term	Definition
Field Test Item	<p>An item presented to a student for field testing (FT). Field testing is the process of evaluating an item's effectiveness for assessment purposes. Field test item scores do not affect student test performance.</p> <p>ITS handles field testing settings in multiple ways:</p> <ul style="list-style-type: none"> • In item attributes, the required <i>Markup for FT</i> selections determine ? • • On a blueprint, users can set parameters for the kinds of field test items that can appear on tests.
Fixed-Form Test	A test that presents the same items and stimuli in the same order each time it is taken, as distinct from a computerized adaptive test (CAT).
Item Bank	The item repository set up for a client or project.
Item Distractors	The incorrect choices available for an item.
Item Exemplar	An item sample or specimen used for providing instructions to students.
Item Graphic	A picture, a chart, a table, or an answer space that is unique to a particular test item. Note that this is different from a stimulus that is used by multiple test questions.
Item Key	The correct answer for an item.
Item Options	Used in multiple-choice item format only. These are the choices available for an item, one of which is the key (or answer).
Item Record	Consists of the item attributes (or characteristics of the item) as well as the item text (the stem/prompt, options, rubric) and any graphics (pictures, charts, tables).
Item Rubric	Used in constructed-response item format only. The rubric outlines the guidelines that should be used when scoring the question.
Item Stem	The part of an item that falls before the response area.
Item Text	The item stem/prompt, options, and rubric.
Level Of Effort	An item metric that estimates the amount of effort required by a student to answer the question.
Lexile	A framework of reading, which is an educational tool that uses a measure called a Lexile to match readers of all ages with books, articles, and other leveled reading resources. The Lexile Framework produces scores using quantitative methods, based on individual words and sentence lengths, rather than qualitative analysis of content.
Quantile	The numeric representation of what an individual is capable of understanding in mathematics or the difficulty of learning that skill.

Term	Definition
SOCK	<p>Stands for Some Other Category of Knowledge. A type of blueprint element similar to a standard or affinity group.</p> <ul style="list-style-type: none"> • By definition, unlike standards and affinity groups, SOCKs are used only for reporting, not for test administration. • Whereas standards are nested in a standard hierarchy in a Content Standards Repository (CSR), SOCKs do not belong to the hierarchy. <p>Some SOCKs define an organization of content standards that is different from the organization of the CSR. Others consist of other information that does not belong to the organization of the CSR; for example, Depth of Knowledge (DOK) levels.</p>
Standard	<p>Also called a content standard, among other things. A learning goal for a student in a specific subject and grade (or course). Standards are usually adopted at the state level, and test items are written to measure achievement of a specific standard.</p>
Stimulus	<p>A graphic, piece of text, table, or chart that is used by multiple test items; in reading, this is often referred to as a passage. Note that this is different from an item graphic that is used by only one test item.</p>
Stimulus Attributes	<p>Characteristics of the stimulus, such as stimulus type and description.</p>
Stimulus Graphic	<p>A picture, chart, table, or map that is a part of the stimulus. The stimulus graphic could be the entire stimulus, or it could accompany some stimulus text.</p>
Stimulus Record	<p>Consists of the stimulus attributes (characteristics of the stimulus) and the stimulus text (the written text) and/or any graphics (pictures, charts, tables).</p>
Strand	<p>A description of the assessment's area of coverage in terms of its relationship with the Learning Progressions. An example is below.</p> <p>The Read with Understanding assessment strand includes items from the following progressions:</p> <ul style="list-style-type: none"> • Vocabulary • Language and text features • Comprehension • Reading critically
Submit	<p>To enter an item or a stimulus into the review process; item writers have access to their items until they are submitted. CAI does not begin reviewing items until they are submitted.</p>
TTS	<p>Text-to-Speech.</p>
Virtual Test	<p>A test that combines multiple segments. Each segment exists as a test in ITS, and the configuration that defines whether an ITS test is a segment in a virtual test is set in FlightPlan. Downstream systems, such as the Test Delivery System (TDS), combine the segments into the virtual test.</p>

Appendix B. Cross-Bank Features

Authorized users can search for items or stimuli across multiple banks, then generate and download Excel (XLSX) reports on them, similar to the bank-specific reports you can generate in the Action Center (refer to [Generate Report](#)). Reports can also be generated based on a list of item or stimulus IDs, as in Action Center.

To access cross-bank features, log in to ITS. At the top-right corner of the **Select an item bank** page, select **Cross Bank**. The **Cross Bank Page** opens in a new browser tab or window, displaying the **Cross Bank Dashboard** tab ([Figure 278](#)). The **Cross Bank Search** and **Cross Bank Report** tabs are available to the right.

Note that in many of the dropdown lists on the **Cross Bank Page**, you can start typing in the dropdown text box to narrow down the list.

Use the Cross-Bank Dashboard

Figure 278. Cross Bank Page: Cross Bank Dashboard Tab

The screenshot displays the 'Cross Bank Dashboard' tab with two main sections: 'Search Results' and 'Report Record(s)'. Both sections include a 'Keyword Search' input field and a table of data. The 'Search Results' table has columns for Key, Name, Entity Type, User, Create Date, Status, Message, and Refresh Date. The 'Report Record(s)' table has columns for Key, Report Name, Entity Type, User, Start Date, Status, Message, and Refresh Date. Both tables include action buttons (refresh, delete, edit, copy) for each row.

Key	Name	Entity Type	User	Create Date	Status	Message	Refresh Date
294		Item		5/13/2025 2:39:39 PM	Complete		5/15/2025 1:15:04 PM
296		Item		5/15/2025 1:15:35 PM	Complete		
295		Item		5/14/2025 1:15:44 PM	Complete		
298		Item		5/20/2025 11:59:45 AM	Complete		
299		Stimulus		5/20/2025 12:15:37 PM	Complete		

Key	Report Name	Entity Type	User	Start Date	Status	Message	Refresh Date
12607		Item		5/14/2025 1:45:47 PM	Complete		
12604		Item		5/14/2025 1:25:43 PM	Error	Object reference not set to an instance of an object.	
12603		Item		5/14/2025 1:21:12 PM	Error	An item with the same key has already been added.	

The **Cross Bank Dashboard** tab of the **Cross Bank Page** ([Figure 278](#)) displays buttons at the top:






- Download Index:** Selecting this button downloads an Excel (XLSX) file containing all the common (cross-bank) information that searches and reports can be based on. You may want to download this file in order to understand how bank-specific terms are mapped to the terms used on the **Cross Bank Page**. For example, the cross-bank subject ELA/Reading is mapped from the bank-specific subjects ELA, Reading, and RLA. Note that bank-specific information is included in the index only if it is mapped.
- Upload Index:** Depending on your role, you can use this button to upload a replacement index in XLSX format. You may need to do this if the terms used in ITS change; for example, if a new subject is added to a bank.

To upload a new index, select **Upload Index**. In the pop-up, select **Browse**. Choose the file from your computer and select **Upload**.


The **Cross Bank Dashboard** tab also displays up to two tables:

- The *Search Results* table lists your existing searches, with information about each. The *Message* column contains any automated messages that have been generated about a search, such as errors.

You can add searches to this table using the **Cross Bank Search** tab, as described in [Search Across Banks](#).





- To filter the saved searches by any column, start typing in the *Keyword Search* text box at the top right.
- To rename a saved search, select its name and type a new name. Then select anywhere outside the table.
- To display a saved search's criteria in JSON format, select  beside it. A pop-up appears. To open the search for editing in the **Cross Bank Search** tab, select  at the top-left corner of the pop-up.
 - After opening and editing the search, you can either save your changes or save to a new search. For more information on creating searches, refer to [Search Across Banks](#).
- To delete a saved search, select  beside it. A deleted search cannot be recovered except by creating it again as described in [Search Across Banks](#).
- To download an XLSX file listing the items or stimuli that met the search criteria when it was last run, select  beside it.
- To refresh the results of a search, select  beside it. For example, if an item is now in a different status from when the search was created, refreshing may cause it to be added to or removed from the results, depending on the criteria. If you do not refresh, the saved search contains exactly the results that it generated last time it was run.

The *Refresh Date* column lists the timestamp of the last refresh.

- To generate a report based on a search, select . The **Cross Bank Report** tab appears, displaying a preset selection under *Select Input Entity List*. Proceed to follow the instructions in [Generate Cross-Bank Reports](#), starting from step 4.

- The *Report Record(s)* table appears if you have existing reports. It lists your reports with detailed information about each. The *Message* column displays any automated messages that have been generated about a report, such as errors.

You can add reports to this table using the **Cross Bank Report** tab, as described in [Generate Cross-Bank Reports](#).

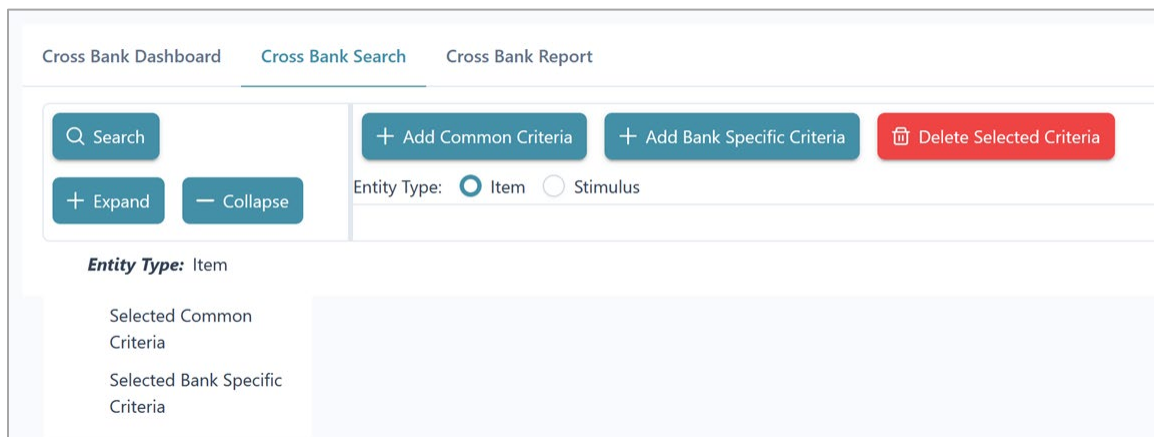
- To filter the reports by any column, start typing in the *Keyword Search* text box at the top right.
- To access a report's inputs, select  beside it. A pop-up appears.
- To delete a report, select  beside it. A deleted report cannot be recovered except by creating it again as described in [Generate Cross-Bank Reports](#).
- To download a report, select  beside it. This action does not refresh the report.
- To refresh the report with the latest information on each item or stimulus, select  beside it. If the report is based on a search, a pop-up appears, asking if you want to refresh the search as well. Selecting **Use Existing** uses the existing search results and selecting **Refresh Search** refreshes the saved search, updating its refresh date in the *Search Results* table. Select **Refresh**.

Each table has a progress bar at the top that indicates how many seconds remain until the table is updated with your latest changes. The progress bar does not indicate that any search or report is being refreshed.

Search Across Banks

In the **Cross Bank Search** tab of the *Cross Bank Page* ([Figure 279](#)), you can search for items and stimuli across banks and save your search. A saved search will allow you to generate reports.

Figure 279. Cross Bank Page: Cross Bank Search Tab



1. Select the **Cross Bank Search** tab.

2. From the *Entity Type* options, select either **Item** or **Stimulus**.

In steps [3](#) and/or [4](#), you will add the search criteria. The criteria can be common (cross-bank) criteria, bank-specific criteria, or both.

Figure 280. Cross Bank Page: Cross Bank Search Tab: Common Search Criteria Sub-Tab

Cross Bank Dashboard Cross Bank Search Cross Bank Report

Search + Add Common Criteria + Add Bank Specific Criteria Delete Selected Criteria

Entity Type: Item Stimulus

Common Search Criteria ✕

✕ Clear This Tab

1 **Bank ***

2 **Subject**

3 **Review**

Select Review(s) ▼

Back Next

4 **Attribute**

5 **IAT Content Attribute**

6 **Sharing/Clone**

7 **IAT Content**

Entity Type: Item

Selected Common Criteria

Selected Bank Specific Criteria

3. To add search criteria that apply across all banks:
- Select **Add Common Criteria**. A new criteria tab appears, as in [Figure 280](#). Note that all common criterion types are optional except bank. At least one bank is required.
 - The **Bank*** section contains two boxes, the first of which lists banks. Select a bank or banks and use the arrow buttons to add them. Then enter part of an item or stimulus description in the *Description* text box.

As you select criteria, they appear in a collapsed list in the panel on the left. Select > to expand and review criteria at any time. Use the **Expand** and **Collapse** buttons to expand and collapse all.

- c. Select **Next** or **Subject**. In the first box, select a subject or subjects, then add them as described in the previous step. To add attributes in a later step, you must first add at least one subject.

Note that throughout the process of selecting criteria, you can use the **Back** buttons to return to the previous criteria sections.

- d. Select **Next** or **Review**. From the dropdown list, select any review lanes and/or review levels. You can use the > button to expand a review lane and display the levels within it.
- e. Select **Next** or **Attribute**. If you selected at least one subject in an earlier step, you can now select attribute values from the dropdown lists, and in the *Item Writer* or *Stimulus Writer* text box, you can enter the name (or part of the name) of a writer.
- f. Select **Next** or **IAT Content Attribute**. Using the text boxes and dropdown lists, set IAT content attribute values. You may set any number of values for each attribute. To enter more than one value in a text box, separate them using a semicolon (;).
- g. Select **Next** or **Sharing/Clone**. The **Sharing/Clone** section contains a checkbox option to include only source items or stimuli. If you select this checkbox, the search will exclude all non-source entities.

Below are four pairs of boxes for *Cloned To*, *Cloned From*, *Shared To*, and *Shared From*. If you select the checkbox above, then *Cloned From* and *Shared From* are disabled. In any enabled pair of boxes, select a bank or banks and use the arrow buttons to add them.

- h. Select **Next** or **IAT Content**. From the dropdown lists, select any IAT content values.
- i. Repeat this step to add as many sets of common criteria as you require.

Figure 281. Cross Bank Page: Cross Bank Search Tab: Bank Specific Criteria Sub-Tab

4. To add search criteria that are specific to particular banks:
 - a. Select **Add Bank Specific Criteria**. A new criteria tab appears ([Figure 281](#)). Note that all bank-specific criterion types are optional except bank.
 - b. Under **Bank*/Subject/Review**, do the following:
 - i. Select a bank from the dropdown list.
 - ii. From the next dropdown list, select a subject. To add attributes and/or content standards in later steps, you must first add a subject.
 - iii. From the dropdown list, select any review lanes and/or review levels. You can use the > button to expand a review lane and display the levels within it.
 - iv. Enter part of an item or stimulus description in the *Description* text box.


As you select criteria, they appear in a collapsed list in the panel on the left. Select > to expand and review criteria at any time. Use the **Expand** and **Collapse** buttons to expand and collapse all.

- c. Select **Next** or **Attribute**. If you selected a subject in an earlier step, you can now select attribute values from the dropdown lists. In the *Item Writer* text box, you can enter the name (or part of the name) of an item writer.

Note that throughout the process of selecting criteria, you can use the **Back** buttons to return to the previous criteria sections.

- d. Select **Next** or **IAT Content Attribute**. Using the text boxes and dropdown lists, set IAT content attribute values. You may set any number of values for each attribute. To enter more than one value in a text box, separate them using a semicolon (;).
- e. Select **Next** or **Content Standard**. If you selected a subject in an earlier step, you can now select standards and/or SOCKs from the dropdown lists.
- f. Select **Next** or **Sharing/Clone**. The **Sharing/Clone** section contains a checkbox option to include only source items or stimuli. If you select this checkbox, the search will exclude all non-source entities.


Below are four pairs of boxes for *Cloned To*, *Cloned From*, *Shared To*, and *Shared From*. If you select the checkbox above, then *Cloned From* and *Shared From* are disabled. In any enabled pair of boxes, select a bank or banks and use the arrow buttons to add them.

- g. Repeat this step to add as many sets of bank-specific criteria as you require.
5. *Optional*: To clear a single criteria tab and start over, select it, then select **Clear This Tab**. Repeat the steps above as needed.
 6. *Optional*: To delete an entire set of criteria, select  to the right of that criteria tab. In the confirmation pop-up, select **Yes**.
 7. To run and save your search, select **Search** at the top-left corner of the page.
 8. In the pop-up that appears, enter a name that will remind you of what the search contains. Select **Search**. The search is run and saved. You can find it listed in the **Cross Bank Dashboard** tab in the *Search Results* table.

Generate Cross-Bank Reports

In the **Cross Bank Report** tab of the **Cross Bank Page**, you can generate a report based on either a saved search or an uploaded list of item or stimulus IDs.







Figure 282. Cross Bank Page: Cross Bank Report Tab

As a shortcut to generate a report based on a saved search, use the  button in the **Cross Bank Dashboard** tab. The **Cross Bank Report** tab appears, displaying a preset selection under *Select Input Entity List*, as in [Figure 282](#). Proceed to follow the instructions below, starting with step [4](#).

1. Select the **Cross Bank Report** tab ([Figure 282](#)).
2. From the *Entity Type* options, select either **Item** or **Stimulus**.
3. In the *Select Input Entity List* section, select either **Id List File** or **Search Result**.
 - If you select **Id List File**, select **Choose**. Using the pop-up that appears, upload a list of item or stimulus IDs from your computer.
 - If you select **Search Result**, select a saved search result from the dropdown list. Instructions for saving a search can be found in [Search Across Banks](#).
4. Select **Next**.
5. In the *Select Report* section, select the type of report you want to generate.
 - **Summary Report:** The Excel file will list information about the items or stimuli. The inputs you select in later steps ([7](#) and/or [8](#)) will determine the columns of information. For more information on this report type, refer to the Action Center section [Print a Summary \(Excel\) Report](#).

- **Content Validation Report:** The download will be a ZIP file containing the Excel report and a TXT log. For each item or stimulus, the Excel file lists any error code generated, the bank key, the entity type, the entity key, the subject, the current review level of the template lane, and any automatically generated message. For more information on this report type, refer to the Action Center section [Print a Content Validation Report \(ZIP\)](#).
 - **Interaction Attributes:** The Excel file will list items (not stimuli) with bank key, entity ID, and grade level, followed by columns of interaction-specific information. After selecting this report type, use the arrow buttons to add the interaction types (sub-types) you want to include. For more information on this report type, refer to the Action Center section [Print an Interaction Attributes \(Excel\) Report](#).
 - **Readability Metric:** The Excel file will list items or stimuli with bank key, entity ID, grade level, word count, and sentence count. After selecting this report type, select at least one readability formula. Each formula appears in its own column. For more information on this report type, refer to the Action Center section [Print a Readability Metric Report \(Excel\)](#).
6. If you selected **Summary Report**, proceed to the next step to add the inputs that will determine what columns the report contains. These can be common (cross-bank) inputs, bank-specific inputs, or both. If you selected any other report type, skip to step [11](#).
7. In the **Common Input** tab under *Select Report*, add any cross-bank inputs as follows:
- a. Select **Cross Bank Report Item Info** or **Stim Info** to expand the first section. In the first box, make selections and use the arrow buttons to add them to the second box.

As you choose inputs, they appear in a collapsed list in the panel on the left. Select **>** to expand and review the inputs at any time. Use the **Expand** and **Collapse** buttons to expand and collapse all.
 - b. Select **Cross Bank Report Item Review** or **Stim Review** to expand the next section.
 - i. In the first box, select review levels and use the arrow buttons to add them to the second box.
 - ii. Select the checkboxes to choose which information you want to retrieve about the review levels.
 - c. Select **Cross Bank Report Item ReviewLane** or **Stim ReviewLane** to expand the next section.
 - i. In the first box, select review lanes and use the arrow buttons to add them to the second box.

- ii. Select the checkboxes to choose which information you want to retrieve about the review lanes.
8. To add bank-specific inputs, do the following and repeat as necessary:
 - a. Select **Add Bank Specific Input**.
 - b. In the **Bank Specific Input** tab that appears, select a bank from the dropdown list.
 - c. Select **Bank Specific Item Info** or **Stim Info** to expand the first section.
 - i. In the first box, make selections and use the arrow buttons to add them to the second box.
 - ii. To include attribute descriptions in the report, select the **Attribute Descriptions** checkbox.
 - d. Select **Bank Specific Item Review** or **Stim Review** to expand the next section.
 - i. In the first box, select review levels and use the arrow buttons to add them to the second box.
 - ii. Select the checkboxes to choose which information you want to retrieve about the review levels.
9. *Optional:* To delete any bank-specific input set you added, select the tab of inputs and then select **Delete Selected Bank Specific Input**. In the confirmation pop-up, select **Yes**.
10. *Optional:* In the *Sort the report columns* section in the panel on the left, do any of the following:
 - Select a column name and use the  or  buttons to move it.
 - Select consecutive column names and use the  or  buttons to move them together.
 - Select one or more column names and use the  or  buttons to move them to the top or bottom of the list.
11. Select **Generate Report** at the top-left corner. The report is run and saved. You can find and download it from the **Cross Bank Dashboard** tab in the *Report Record(s)* table.

Appendix C. Item and Stimulus Import Overview

ITS supports two types of item imports:

- **IAT-compatible imports:** These imported items can be modified in our proprietary Item Authoring Tool (IAT).
- **Non-IAT-compatible imports:** These imported items cannot be modified in IAT.

In general, items in QTI format are supported in IAT. Any other format is evaluated and determined during the initial phase of the process.

Most vendors' stimuli are always compatible with IAT, but Educational Testing Service (ETS) stimuli are not.

Import Items and/or Stimuli to ITS

Importing items and/or stimuli to ITS is done by a member of the Content team who has access to the Import Admin user role.

Steps vary depending on the vendor. Vendors include Pearson, Educational Testing Service (ETS), and the Smarter Balanced Assessment Consortium (SBAC or Smarter).

1. Before importing, and especially when the target ITS item bank is initially being set up, make sure any additional item/stimulus attributes that need to be captured from the import metadata are configured in the bank. You can request new attributes by emailing the ITS Help Desk (refer to [Descriptions of All Platform Review Reports](#))
2. [This appendix provides Item Development Managers \(IDM\), Senior Item Development Coordinators \(SIDC\), Item Development Coordinators \(IDC\), and Program Managers \(PM\) with a summary of each available ITS report related to Platform Review, including how it is accessed, what information it does contain, and what information it does not contain.](#)
3. [Table 12: Descriptions of All Platform Review Reports](#)

4. Name (Source) of Report	How It Is Accessed	What It DOES Contain	What It Does NOT Contain	Additional Information and Exceptions
Download Details Report	Platform Review Administrator Role in ITS	All entities that are in any of the following statuses: <ul style="list-style-type: none"> • Currently being reviewed by Platform Review team • Platform Review Approval (complete) • Platform Review Resolution (R&R) 	Entities that have never gone through platform review (including new field test items/stimuli that recently had content and/or accommodations approved)	Items with “Ready for Platform Review – Start” will not be included unless they previously underwent platform review.
Platform Review User Throughput Report and Ready Report	Automatically emailed to these users every Monday morning: <ul style="list-style-type: none"> • CAI APC- Platform Review • CAI PR Reviewers 	Counts of all entities that are in any of the following statuses: <ul style="list-style-type: none"> • Ready for Platform Review • Platform Review Failed • Platform Review Resolution (R&R) 	Entities that are in any of the following statuses: <ul style="list-style-type: none"> • Not Ready for Platform Review • Currently being reviewed by Platform Review Team • Platform Review Approval (complete) 	Item and stimulus IDs are not included.
Content Validation	Either from Publication Administrator role or by running a summary report on a config or list of entities in the Action Center	All entities that are in any of the following statuses: <ul style="list-style-type: none"> • Not Ready for Platform Review • Ready for Platform Review • Platform Review Resolution • Platform Review Failed (Triage) 	Entities that have successfully completed Platform Review (Platform Review Approval – Complete)	

4. Name (Source) of Report	How It Is Accessed	What It DOES Contain	What It Does NOT Contain	Additional Information and Exceptions
Summary Report	Either by performing a user-defined search of entities in ITS or uploading a Notepad file of entities via the Action Center	User Defined – any subset or all of these can be included: <ul style="list-style-type: none"> • Not Ready for Platform Review • Ready for Platform Review • Platform Review Resolution • Platform Review Approval • Platform Review Failed (Triage) 	User Defined – any subset or all of these can be excluded: <ul style="list-style-type: none"> • Not Ready for Platform Review • Ready for Platform Review • Platform Review Resolution • Platform Review Approval • Platform Review Failed (Triage) 	Must be run for each subject area and each entity type (for example, math items, science stimuli). User can also search by attributes and review levels and include these in the report.
Cross Bank Search	Using the Cross Bank role	Same as Summary Report	Same as Summary Report	Can be run for multiple subject areas and both entity types simultaneously.

5. User Support) with a list.

Additional attributes will be prepended with “Import_” and included as noneditable fields in the **Attributes** section of each item or stimulus in the bank.

6. After obtaining a zipped package folder or folders from the vendor, unzip it and prepare the package as follows:
 - a. Make sure no folder names contain spaces, including any folders within the package folder. (File names may contain spaces.)
 - b. Make sure there is an assets subfolder directly within the package folder. If the assets subfolder is named anything other than assets (for example, source), change its name to assets. This folder contains any image, audio, or video files used in the items/stimuli.

- c. *Pearson/ETS vendors*: Add subject and grade mappings to each item/stimulus in the metadata files by inserting two columns at the end of each file:
- In the ITS Subject column, enter the subject as used in the ITS item bank. For example, if a metadata file lists *Physical Science* in the column where the vendor stores the subject attribute, you might enter *Science* as the corresponding ITS subject.
 - In the ITS Grade column, enter the grade as used in the ITS item bank. Ensure that this value matches the ITS item bank's grade value exactly, including any leading zeros.
- d. *Pearson/ETS vendors*: Move the metadata files so they are directly inside the package folder.
- e. *Optional*: To specify a subset of items/stimuli to import, create lists of their vendor-specified IDs in TXT format and place them in the main folder.
- *Smarter vendors*: You may create two separate lists for items and stimuli.
 - *Pearson/ETS vendors*: You may create a single list of items only.

If you do not include a list or lists, all items and/or stimuli will be imported.

7. Use FileZilla to place the final unzipped folder in the correct location on the S3 server.

To do this, you will need to contact ASCM, let them know you're planning to import, and request access to the server location.

8. Log in to ITS and access the desired item bank as an Import Admin.
9. From the *Admin* menu, select **Content Import Administrator**. The import request page appears ([Figure 283](#)).

Figure 283. Import Request Page

Import Request Dashboard							
Batch Id	Submit Time	Status	Start Time	End Time	User	Message	Report
2411	5/23/2023 2:08:01 PM	Completed	5/23/2023 2:10:05 PM	5/23/2023 2:11:10 PM	its@cambiumassessment.com	Import completed Successfully	Download
2361	5/2/2023 7:13:58 PM	Completed	5/2/2023 7:16:29 PM	5/2/2023 7:18:15 PM	its@cambiumassessment.com	Import completed Successfully	Download
2360	5/2/2023 7:12:10 PM	Fail	5/2/2023 7:13:24 PM		john.smith@cambiumassessment.com	The VendorIdListToBeImported file G6G7TTAP does not exist under \192.168.240.179\ITS\iatcontent\NB_Texas_OO2\Import\2023_Development_TTAP_Items.	Download

10. At the bottom of the *Import Request Dashboard* section, select **Create Import Request**. A form appears below. The form available for Pearson is shown in [Figure 284](#) and the one for Smarter is shown in [Figure 285](#).

Figure 284. Pearson Import Request Form

Setting Name	
Please select a vendor configuration:	Pearson <input type="button" value="v"/>
TaskType:	Pearson_Import
ImportRootPath:	s3://its-content-prod/Import/IB_Texas_OO2/
TaskRootFolder:	<input type="text"/>
ImportPackageResourceFolder:	assets
VendorIdListToBeImported:	<input type="text"/>
ImportPrimaryReviewLevel:	--Select-- <input type="button" value="v"/> <i>Review Type: PrimaryReview</i> <i>Entity Type: Item</i> <i>Review Lane: Template</i>
ImportReviewLevel:	--Select-- <input type="button" value="v"/> <i>Review Type: SubReview</i> <i>Entity Type: Item</i> <i>Review Lane: Template</i>
ImportOverwriteExistingItem:	<input checked="" type="radio"/> True <input type="radio"/> False
ImportOverwriteExistingStimulus:	<input checked="" type="radio"/> True <input type="radio"/> False
AutogeneratePaper:	<input checked="" type="radio"/> True <input type="radio"/> False

Figure 285. Smarter Import Request Form

Setting Name	
Please select a vendor configuration:	Smarter <input type="button" value="v"/>
ImportRootPath:	s3://its-content-prod/Import/IB_SBAC_Field_Test_IAT_OO2/
TimsPackagePath:	<input type="text"/>
TimsItemPackageIdList:	<input type="text"/>
ImportReviewLevelItem:	--Select-- <input type="button" value="v"/> <i>Review Type: PrimaryReview</i> <i>Entity Type: Item</i> <i>Review Lane: Template</i>
TimsStimulusPackageIdList:	<input type="text"/>
ImportReviewLevelStim:	--Select-- <input type="button" value="v"/> <i>Review Type: PrimaryReview</i> <i>Entity Type: Stimulus</i> <i>Review Lane: Template</i>
ImportTimsRubric:	<input type="radio"/> True <input type="radio"/> False
ImportTimsHRR:	<input type="radio"/> True <input type="radio"/> False

Save

11. Fill out the form as follows.

- a. If necessary, select the vendor. The form settings available may change and some default settings may autopopulate, as shown in [Figure 284](#) and [Figure 285](#).
- b. In either the *TimsPackagePath* text box (Smarter vendors) or the *TaskRootFolder* text box (Pearson/ETS vendors), enter the name of the folder on the S3 server. ITS will check for the folder in the location specified in the *ImportRootPath* text box (which is not editable).
- c. *Pearson/ETS vendors*: The *ImportPackageResourceFolder* text box should contain the folder name assets. This must match the name of the assets subfolder.

- d. *Optional*: To specify a subset of items/stimuli to import, do one of the following using the list(s) you created in step [6.e](#):
- *Smarter vendors*: In the *TimsItemPackageIdList* text box and the *TimsStimulusPackageIdList* text box, enter the filenames of the TXT list(s) of the vendor-specified IDs or UINs for the items and stimuli, respectively, that you want to import.
 - *Pearson/ETS vendors*: In the *VendorIdListToBeImported* text box, enter the filename of the TXT list of the vendor-specified IDs or UINs for the items (not stimuli) you want to import.

As stated earlier, if you do not do this, all items and/or stimuli will be imported.

- e. To set the target review levels for the items/stimuli, do one of the following:
- *Smarter vendors*: From the *ImportReviewLevelItem* and *ImportReviewLevelStim* dropdown lists, select the primary review level that all the items and stimuli, respectively, should have in ITS.
 - *Pearson/ETS vendors*: From the *ImportPrimaryReviewLevel* dropdown list, select the primary review level that all the items and stimuli should have in ITS. From the *ImportReviewLevel* dropdown list, select the secondary review level that all the items and stimuli should have in ITS.
- f. *Smarter vendors*: Make selections from the *ImportTimsRubric* and *ImportTimsHRR* options. If **True** is selected, the import will overwrite the rubric or human-readable rubric (HRR), respectively, for any item whose vendor-specified ID is the same as that of an imported item. If **False** is selected, any matching item will retain its existing rubric or HRR, respectively.
- g. *Pearson/ETS vendors*: Make selections from the *ImportOverwriteExistingItem* and *ImportOverwriteExistingStimulus* options. If **True** is selected, the import will overwrite any ITS item or stimulus, respectively, whose vendor-specified ID is the same as that of an imported item/stimulus. If **False** is selected, any matching ITS item or stimulus, respectively, will remain as is and the import will have no effect.
- h. *Smarter QT13 vendor*: Make a selection from the *SkipTutorial* options. If **True** is selected, no tutorials will be imported. If **False** is selected, any tutorial associated with an item will be imported.
- i. *Pearson/ETS vendors*: If the *AutogeneratePaper* options are available, make a selection. All Pearson/ETS imports should be set to **True**. If **True** is selected, ITS will generate paper versions of all the items/stimuli, with exceptions for certain custom interaction types. If **False** is selected, no paper versions will be generated.

- j. Click **Save**. The import is scheduled according to the following rules. Note that times are always in Eastern Standard Time (EST) regardless of the time of year.
- No imports can be processed from 2:00 AM to 5:00 AM EST.
 - *Smarter/Pearson vendors*: No imports can be processed from 9:00 PM to 12:00 midnight EST. They can be processed between 12:00 midnight and 2:00 AM EST.
 - *ETS vendor*: If the import package contains 10 or fewer items/stimuli in total, it is processed immediately. If it contains 11 or more items/stimuli, it is processed between 12:00 midnight and 2:00 AM EST.

When the import is complete, an email is sent to everyone concerned (as configured by the ITS team). This email contains a download link for the import request report. You can also download this report by following the instructions in step [14](#).

12. Wait for the import to be processed. To view the latest import requests and their statuses, refresh the table of requests by clicking **Refresh**.
13. In the table, find your import request and check its status and message.
- If the import failed, read the message to learn what went wrong. Start the import process over as needed.
 - Note that a Completed status and successful message do not necessarily indicate that all items/stimuli imported successfully.
14. When the **Download** link is available in the Report column, click it to download an Excel (XLSX) report. Note that this report may be available before the process is completed, but may not list all items or stimuli yet. Open the report.
15. In the Entities worksheet of the report, which lists items/stimuli, review the Success, Warning, and Message columns for information about each one. An item/stimulus that failed to import is listed with Success: 0.

The SourceID column in the Entities worksheet lists the item or stimulus's vendor-specified ID and the EntityKey column lists the ITS ID.

16. *Smarter vendors*: Review the ContentTextValidation worksheet of the report, which lists items/stimuli.
- The ImportedVersion column provides the current version number of each item/stimulus as taken from the vendor system, and the FieldTestedVersion column provides the last version number recorded in ITS before the import.

- The CompareResult column describes how different the two versions of each overwritten item/stimulus are. The CompareDetail column quotes the text that is different between the two versions.

Each imported Smarter item/stimulus comes complete with a version history, making it possible to track its various versions across both ITS and the vendor system.

17. If any imported image, audio, or video files are too large, alert the Graphics team by email and request that they reduce their file size. The Graphics team will get help from the ITS team to reupload the reduced files. You will not need to reimport the files.

18. If necessary, submit a new import request for any items/stimuli that failed to import.

Impact of ITS on the Import Process

All items are required to go through a review process before being tested. ITS supports parallel reviews, which are particularly helpful for adding, editing, and reviewing accommodations, scoring, and secondary language translations.

Without parallel reviews, accommodation and accessibility vendors, who complete work such as tagging for text-to-speech or generating braille files, would have to wait in line before each vendor could begin their work. With parallel reviews, these vendors can all work on one item simultaneously.

To ensure items have the appropriate accommodation(s) before Field Test or being Operational, there is an ITS functionality to track and remind users if any accommodation is missing. This is driven by two mandatory attributes: Markup for FT and Additional Markup for Operational.

Impact on IAT-Compatible Imports

The import process itself is not changed by the parallel review functionality. Items are imported to the designated/agreed-upon review level. All entities such as accommodations, scoring, and the translation file that comes along with the item are displayed as in [Figure 286](#).

Figure 286. View/Edit Item Page



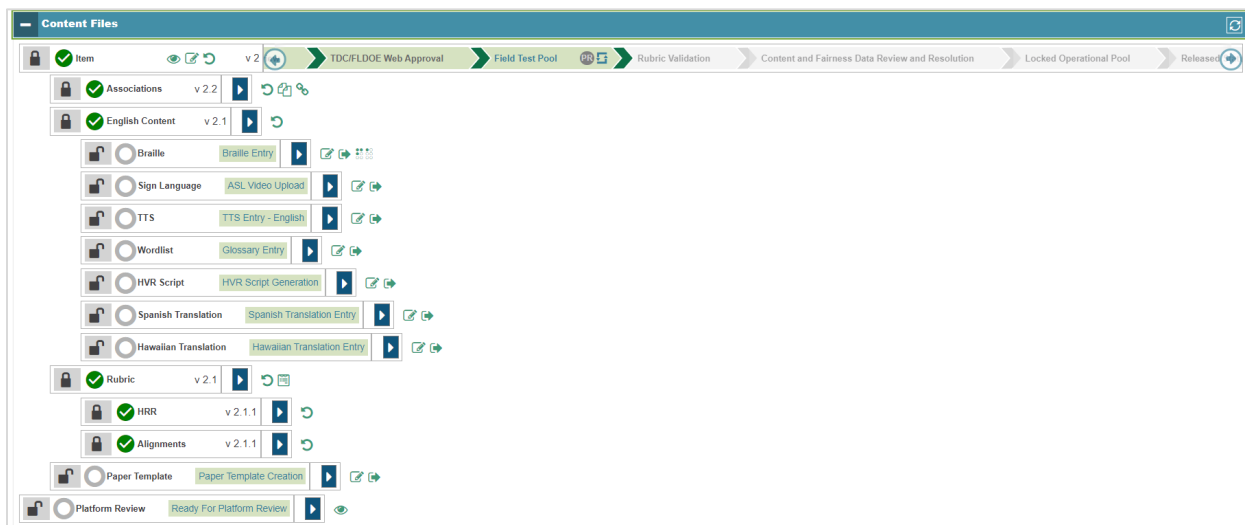
The biggest impact is during the post-import item review process. Since the items can be edited in IAT, they will be treated as if created in ITS. This means all items will be subject to the following ITS standard business rules.

Except for Student Help items, all are required to have the following before web approval:

- Rubric
- Exemplar

After the Rubric and Exemplar are added, an item can be approved and all review lanes or swim lanes are made available.

Figure 287. Review/Swim Lanes on the View/Edit Item Page



The lanes shown in [Figure 287](#) are *not* mandatory, except for Alignments. If an item doesn't have CSR alignment, it cannot move beyond Field Test Pool.

Figure 288. Alignments Review Lane



Attributes

The values for the below attributes should be determined for every item during the import. You can select "N/A" if none apply. These attributes can be updated any time after the import.

Figure 289. Item Attributes

Markup for FT *

Braille
 Paper
 SignLanguage
 SpanishStacked
 TTS
 Wordlist
 HVRScript

Braille: Braille
 Paper: Paper
 SignLanguage: SignLanguage
 SpanishStacked: Spanish Stacked
 TTS: TTS
 Wordlist: Wordlist
 HVRScript: HVR Script

Additional Markup for Operational *

HVRRecording

HVRRecording: HVR Recording

This feature ensures that an item has the required accommodation for FT or LOP.

Below are a few vendors we support in IAT:

- Pearson
- Quester
- CenterPoint
- Illustrative Math
- iLearn
- iSTAR
- TIMS
- College Board

Impact on Non-IAT-Compatible Imports

The import process is not changed by the parallel review functionality. The template lane is open to review and move items forward as needed.

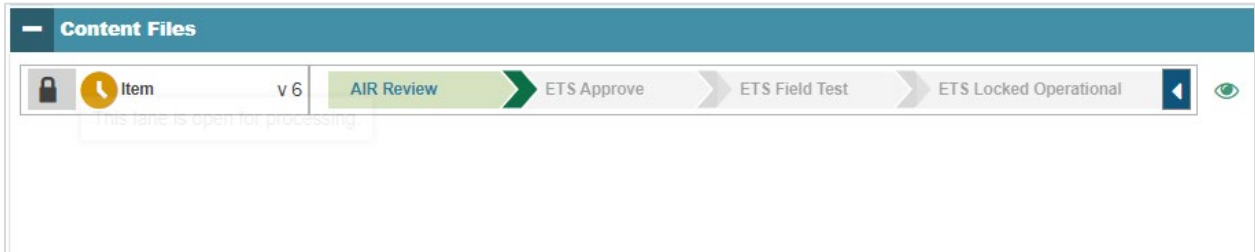
Since content cannot be edited, swim lanes are not available. However, the attributes mentioned in the [Attributes](#) section are still required, and so is the exemplar.

If an item needs Alignment or Tutorial, a request must be sent to itembankhelpdesk@cambiumassessment.com to update them from the ITS Admin tool.

Client-Specific Imports: California ETS Imports

Items are imported to the AIR Review level or the designated/agreed-upon review level. The project team review and move the item forward as necessary.

Figure 290. CA ETS Item Review Lane Status



If content needs editing, it is done in the Vendor system, then re-imported into ITS. In order to re-import, the content team must make sure items are at an unlocked level.

Appendix D. Psychometrics Tasks in ITS

This appendix provides instructions for tasks that the Psychometrics (Tech) team performs in ITS. It includes the following sections:

- [Publishing CAT Simulation Settings and Accepting Them in ITS](#)
- [Creating Upload Files](#)

Publishing CAT Simulation Settings and Accepting Them in ITS

Some settings of the item selection algorithm are determined during the simulation of test events in Web Simulator. Psychometricians can push these settings from Web Simulator as follows:

1. Log in to Web Simulator (<https://simulator-analysis.cambiumast.net>).
2. Select a client from the *Client* dropdown list.
3. Use the **Setup Simulation Session** tab to set up your session as needed.
4. In the **Manage Simulation Session** tab ([Figure 291](#)), find your session in the table. Click **Publish to ITS**. In the confirmation pop-up, click **OK**.

Figure 291. Web Simulator: Manage Simulation Session Tab

Session ID	Description	Language	Date Created	Simulation Status	Simulation Start	Simulation End		
Zhon-20	G58_ENU_Config_42759_N5000	ENU	3/16/2022 11:39:29 AM	completed	3/16/2022 12:03:54 PM	3/16/2022 12:36:10 PM	Run Sim	Clear Sim Data View Details Publish to ITS Publish Test Packages

Psychometricians can then accept the settings into ITS by using the role Publication Administrator (Tech Team) and following the instructions in [Viewing Simulation Data and Updating from Simulation](#).

Creating Upload Files

Upload files may contain item statistics and item parameters. Internally, Cambium Assessment, Inc. only handles parameters, but some clients may need to include statistics. Things that Stats Workspace (WS) cannot handle must be appended to files.

Refer to the document *Uploading Parameters in Stats Workspace (WS)* for more information.

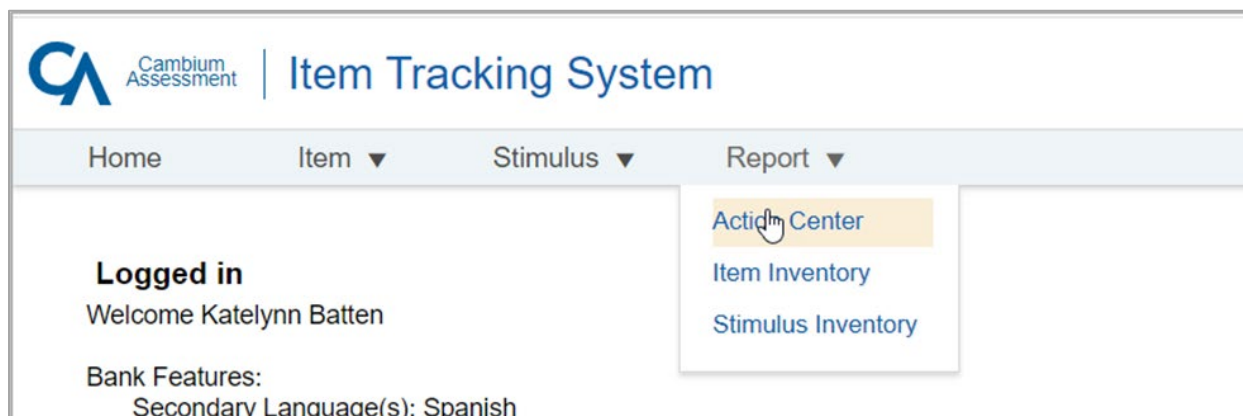
Creating an Item List

1. Acquire a list of items for each test. This will require obtaining the bookmaps or a similar document that has a full list of items.
2. Remove duplicates in the list. Do not sort.
3. For operational (OP) tests, remove the field test items unless you have been told that the test is an OP field test.
4. Create TXT files of each test item list and save.

Generating an ITS Report

1. From the *Reports* dropdown menu, select **Action Center**.

Figure 292. ITS Homepage with Report Menu Expanded



2. For the input type, select **Upload File**. Then click the **Choose File** button to select the TXT file of the item list.
3. On the left side, under **Action Center**, click **Reports** and then **Generate Report**.
4. The desired file is Summary Report (Excel).
5. For the input set, find the **Upload Shell** input set. Verify that the attributes include the following: **ID**, **Item Position**, **Item Format**, and **IAT Max Score**.
6. Click **Create Report** on the left side. This will generate the Summary Report.
7. Save the downloaded **Summary Report** file within an **Unformatted File**.

Creating the Blank Shell

1. For the input set, find the **Upload Shell** input set. Verify that the attributes include **ID**, **Item Position**, **Item Format**, and **IAT Max Score**.
2. Click **Create Report** on the left side. This generates the Summary Report.
3. Create a new Excel spreadsheet for the new blank shell and open an existing shell used by the state for which this is to be used as reference.
4. Copy the top line of the existing shell into the blank shell. The column headers are as follows:
 - BANK ID, ITEM_ID, POS_NO, ITEM_TYPE, MODEL_PARAMETER_0, MODEL_PARAMETER_1, MODEL_PARAMETER_2, DIMENSION, MODEL, SCOREPOINTS, RECODERULE, Q1STAT, Q1FLAG, PTBISERIAL

Filling the Columns

1. Open the **Summary Report** from the **Unformatted** folder. Copy the item id column from the report to the new blank shell's ITEM_ID column.
2. In the BANKID column, copy the Bank Key from the ITS page header for every row where the ITEMID is populated.
3. In the POS_NO column, fill the column from 1 to the last row (1, 2, 3...).
4. Fill the ITEM_TYPE column with "IAT" for every item unless otherwise instructed.
5. For the MODEL column, follow these instructions:
 - a. Items will either be IRT3pln or IRTGPC. For FSA tests, refer to the item appendix file.
 - b. Re: NGSS Model: DS: Since all items are multiple choice type for Pearson tests at least until now, use "IRT3pln". For FSA tests, you can refer to item appendix file.
 - c. For the SCOREPOINTS column, copy the IAT Max Score column from the Summary file in the same order.
6. Save as a comma-separated values (CSV) file and follow the naming convention below:
 - *Test#Year_ITSUpload_Subject_IAT_Date.csv*
 - **Example:** *Test2024_ITSUpload_Bio1_IAT_02252024.csv*

Performing Quality Control (QC) on the Blank Shell

1. Save the file in CSV format and follow the naming convention below:
 - *Test#Year_ITSUpload_Subject_IAT_Date.csv*
 - **Example:** *Test2024_ITSUpload_Bio1_IAT_02252024.csv*
2. Make sure the BANKID is the correct value compared to the ITS site.
3. Use the **Bookmap** to confirm the ITEM_ID and SCOREPOINTS columns.
4. Make sure that ITEM_TYPE are all "IAT" and MODEL is all "IRT3pIn" or "IRTGPC" based on the item Appendix File.
5. Save the QC file in a QC folder separate from the upload shell.

Appendix E. Descriptions of All Platform Review Reports

This appendix provides Item Development Managers (IDM), Senior Item Development Coordinators (SIDC), Item Development Coordinators (IDC), and Program Managers (PM) with a summary of each available ITS report related to Platform Review, including how it is accessed, what information it does contain, and what information it does not contain.

Table 12: Descriptions of All Platform Review Reports

Name (Source) of Report	How It Is Accessed	What It DOES Contain	What It Does NOT Contain	Additional Information and Exceptions
Download Details Report	Platform Review Administrator Role in ITS	All entities that are in any of the following statuses: <ul style="list-style-type: none"> • Currently being reviewed by Platform Review team • Platform Review Approval (complete) • Platform Review Resolution (R&R) 	Entities that have never gone through platform review (including new field test items/stimuli that recently had content and/or accommodations approved)	Items with “Ready for Platform Review – Start” will not be included unless they previously underwent platform review.
Platform Review User Throughput Report and Ready Report	Automatically emailed to these users every Monday morning: <ul style="list-style-type: none"> • CAI APC- Platform Review • CAI PR Reviewers 	Counts of all entities that are in any of the following statuses: <ul style="list-style-type: none"> • Ready for Platform Review • Platform Review Failed • Platform Review Resolution (R&R) 	Entities that are in any of the following statuses: <ul style="list-style-type: none"> • Not Ready for Platform Review • Currently being reviewed by Platform Review Team • Platform Review Approval (complete) 	Item and stimulus IDs are not included.

Name (Source) of Report	How It Is Accessed	What It DOES Contain	What It Does NOT Contain	Additional Information and Exceptions
Content Validation	Either from Publication Administrator role or by running a summary report on a config or list of entities in the Action Center	All entities that are in any of the following statuses: <ul style="list-style-type: none"> • Not Ready for Platform Review • Ready for Platform Review • Platform Review Resolution • Platform Review Failed (Triage) 	Entities that have successfully completed Platform Review (Platform Review Approval – Complete)	
Summary Report	Either by performing a user-defined search of entities in ITS or uploading a Notepad file of entities via the Action Center	User Defined – any subset or all of these can be included: <ul style="list-style-type: none"> • Not Ready for Platform Review • Ready for Platform Review • Platform Review Resolution • Platform Review Approval • Platform Review Failed (Triage) 	User Defined – any subset or all of these can be excluded: <ul style="list-style-type: none"> • Not Ready for Platform Review • Ready for Platform Review • Platform Review Resolution • Platform Review Approval • Platform Review Failed (Triage) 	Must be run for each subject area and each entity type (for example, math items, science stimuli). User can also search by attributes and review levels and include these in the report.
Cross Bank Search	Using the Cross Bank role	Same as Summary Report	Same as Summary Report	Can be run for multiple subject areas and both entity types simultaneously.

User Support

If at any time you have any questions about ITS or experience any technical difficulties while using ITS, please contact the Help Desk.

ITS Help Desk

Email Support: itembankhelpdesk@cambiumassessment.com

Regular Hours*: Monday–Friday from **9:00 AM to 5:00 PM ET** (except holidays)

(*Any requests sent outside of this timeframe will be responded to on the next business day.)

Please use the following guidelines when emailing a request to the Help Desk:

- In the subject line of the email, please provide the name of the project that you are working on.
- In the body of the email please provide the following details:
 - The grade and subject you are operating in
 - The user group you are signed in as
 - If the error you are experiencing is with a particular item, the item ID as well as the text of the error message
 - A phone number where you can be reached and a good time to call

Once an email has been sent to itembankhelpdesk@cambiumassessment.com, you will receive an automated reply verifying that the ITS team has received the request.