



Surpass ItemBank Guidance for Principal Assessors viewing Assessments

January 2015

Revised August 2016, July 2017, January 2021, March 2021

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Version 2.4

Summary of Revisions from Version 1

| Section | Page | Revision |
|----------------------------|-------------|---------------------------------------|
| Whole guide | | Revised screenshots |
| Computer Specification | 5 | Revised Computer Specifications |
| Logging In and Homepage | 6 | Revisions to how passwords are issued |
| Appendix - Troubleshooting | 15 | Added new Troubleshooting section |

Summary of Revisions August 2016

| Section | Page | Revision |
|----------------------------|-------------|--|
| Computer Specification | 5 | Minor revisions to Computer Specifications |
| Appendix - Troubleshooting | 15 | Added new User validation failed issue |

Summary of Revisions July 2017

| Section | Page | Revision |
|-------------------------|-------------|---|
| Amending the Assessment | 11 | Addition to instructions on adding comments |
| Amending the Assessment | 11 | Revision to state that content can be amended |

Summary of Revisions January 2021

| Section | Page | Revision |
|------------------------|-------------|---|
| Computer Specification | 5 | Revised Computer Specifications |
| Viewing the Assessment | 9 | Revised instructions for viewing a question paper and marking instruction |

Summary of Revisions March 2021

| Section | Page | Revision |
|------------------------|-------------|---|
| Viewing the Assessment | 9 | Revised instructions for viewing a question paper and marking instruction |

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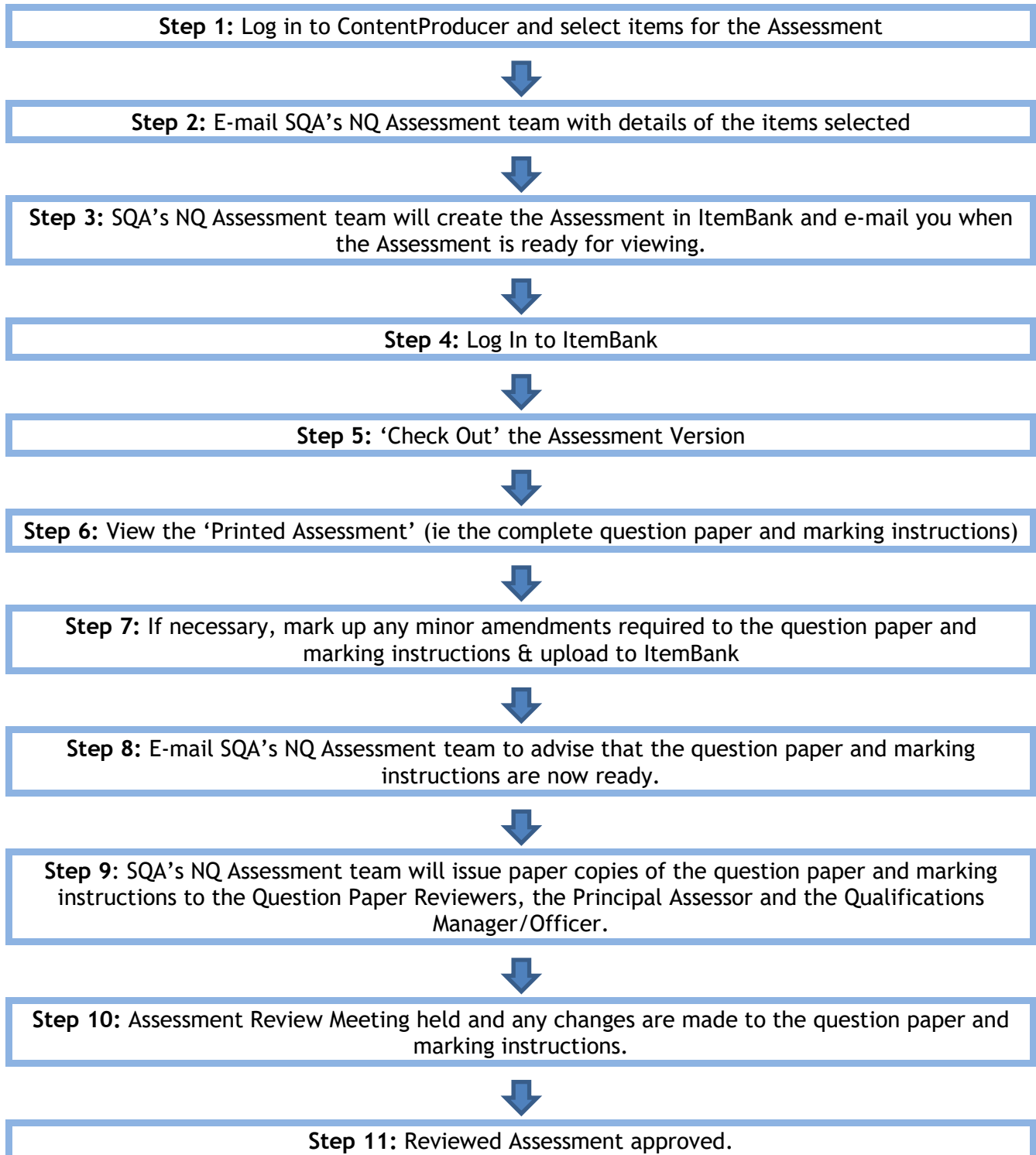
1. Assessment Creation Overview

ItemBank is designed for use in both paper-based and onscreen assessments; however, this guide is intended for use with **paper-based assessments only**. An assessment is a question paper and its associated marking instructions.

Principal Assessors will use ItemBank to:

- preview the complete question paper and marking instructions in advance of the Assessment Review Meeting.

An overview of the Assessment Creation process is detailed below:



2. Getting Started

(a) Computer Specification

Your computer must meet the following minimum specifications to run ItemBank.

| | |
|------------------|---|
| Processor | 2.33GHz Single core CPU Or 1.2GHz Dual core CPU |
| Memory | 1GB |
| Display | Screen resolution of 1024 x 768 Graphics card with at least 64MB of memory |
| Internet Browser | Surpass Viewer* |
| Microsoft Word | 2007 or above |

*See [Surpass Viewer installation guide for ItemBank](#).

(b) Key Contacts

| Activity | Contact | Telephone/e-mail |
|--|--|---|
| Using ItemBank Username/password queries | ADD - NQ Assessment | question.papers@sqa.org.uk 0345 213 6807 |
| Subject support & advice | Qualifications Manager Qualifications Officer | |

(c) Security

Please refer to Section 2 - Security of confidential materials in the Guidance for Producing and Quality Assuring Items, Question Papers and Marking Instructions for a note of security procedures which must be followed when using ItemBank. You can access this guidance via the Appointee Portal.

3. Logging In and Homepage

(a) Logging In

You will be sent an e-mail from question.papers@sqa.org.uk detailing the address for logging in to ItemBank and your username. You will be sent an auto-generated e-mail from ItemBank containing your password.

- Follow the link in the e-mail.
- Enter your username and password. Please note the password is case sensitive.



- Click 'Log In'.

(b) System Lock

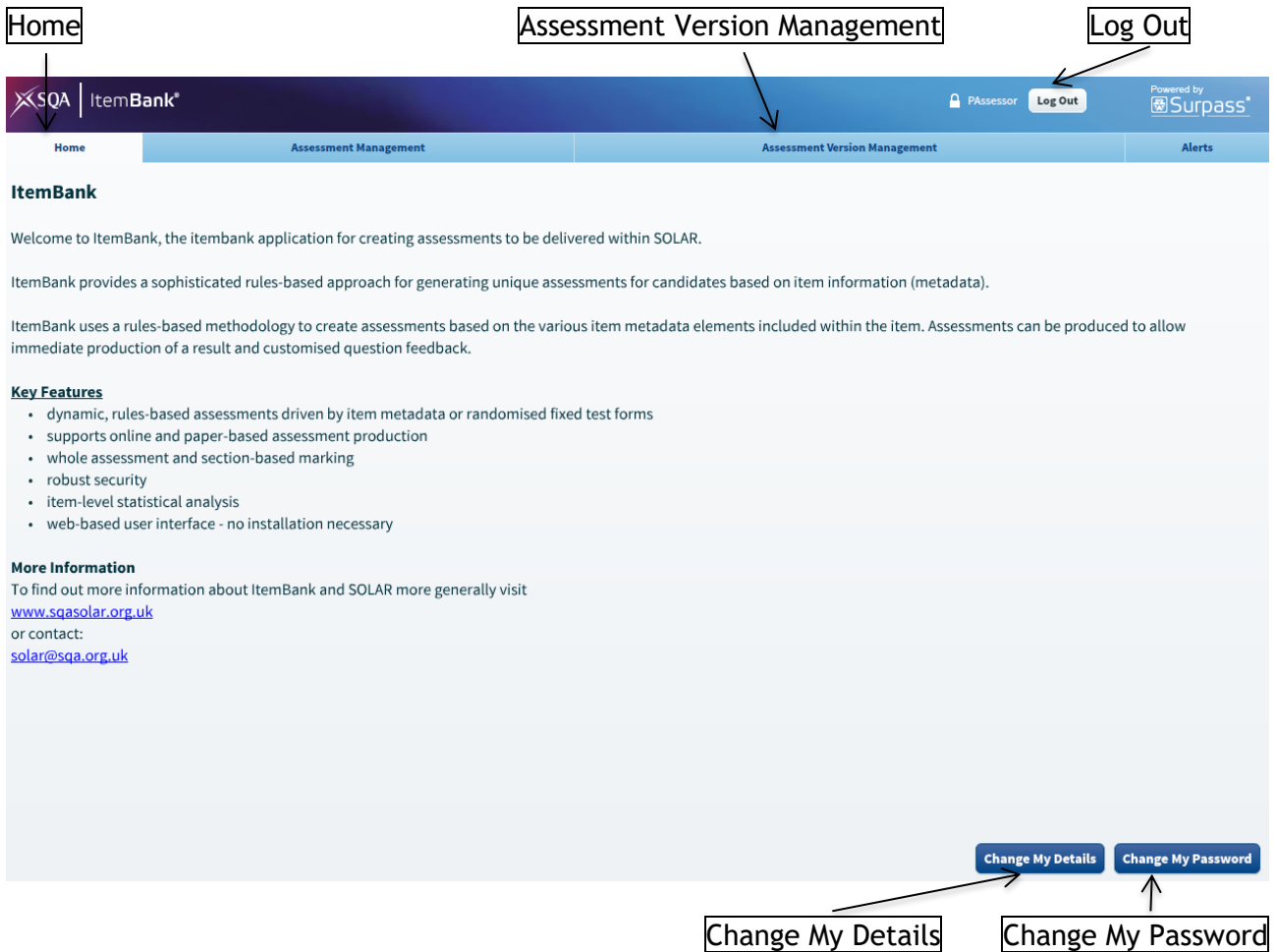
After a period of inactivity, ItemBank will lock you out and you will have to re-enter your password.



- Enter your password and click 'Log In' to continue working in ItemBank.

(c) Homepage

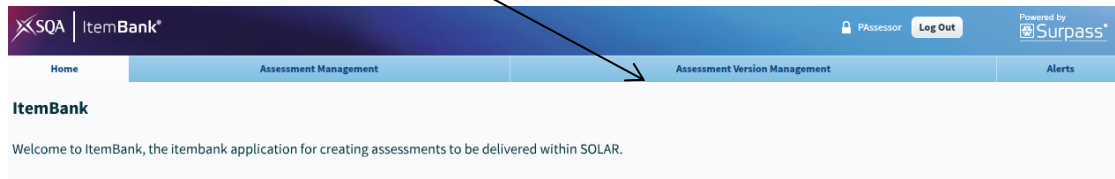
This is the ItemBank homepage.



- Clicking on any of the tabs along the top of the page will take you to the relevant screen - 'Home' or 'Assessment Version Management'.
- To log out of ItemBank use the 'Log Out' button at the top of the screen.
- To change any of your details (name or e-mail address) use the 'Change My Details' button at the bottom of the screen.
- To change your password use the 'Change My Password' button at the bottom of the screen. When you first log in to ItemBank you should change your password.

4. 'Check Out' the Assessment Version

- Click on 'Assessment Version Management' to access the Assessment Version Management tab.



An 'Assessment Version' refers to a question paper for a specific year. Within this tab you should see a list of any question papers for which you are responsible. Please get in touch with NQ Assessment if you do not see your question papers. The Assessment Version Name column will indicate the year of the question paper.

- If necessary, the Assessment Version Name column can be expanded by clicking and dragging the column edge.

The screenshot shows the 'Assessment Version Management' interface. A table lists various assessment versions. The 'Assessment Version Name' column is highlighted in blue. A box labeled 'Assessment Version Name' points to this column. Below the table, a box labeled 'Check-Out' points to the 'Check-Out' button in the bottom navigation bar.

| Subject | Assessment Name | Assessment Version Name | Asses... | Sta... | Start Date | End Date | Start T... | End Ti... | Checked-in/out Sta |
|------------------|------------------------------|--------------------------------|----------|--------|---------------------|---------------------|------------|-----------|---------------------|
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 1 | NQAT1 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 2 | NQAT2 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 3 | NQAT3 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 4 | NQAT4 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: blac |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 5 | NQAT5 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 6 | NQAT6 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training Di | NQATD | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: blac |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 7 | NQAT7 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST QM Training | TEST NQ Assessment Training | TEST NQ Assessment Training 8 | NQAT8 | Draft | 24/07/2014 00:00:00 | 24/07/2024 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: adm |
| TEST PA Training | TEST PA Training Assessment | TEST 2014 PA Training Paper 1 | X99901 | Draft | 24/05/2013 00:00:00 | 25/05/2023 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: midc |
| TEST PA Training | TEST PA Training Assessment | TEST 2014 PA Training Paper 2 | X99901 | Draft | 24/05/2013 00:00:00 | 25/05/2023 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: midc |
| TEST QM Training | TEST QM Training Structured | TEST 2014 QM Training Structur | X12345 | Draft | 04/04/2013 00:00:00 | 05/04/2023 00:00:00 | 00:00:00 | 23:59:59 | Checked-out by: gur |
| TEST QM Training | TEST QM Training Unstructure | TEST 2014 QM Training Unstruct | X12345 | Draft | 04/04/2013 00:00:00 | 05/04/2023 00:00:00 | 00:00:00 | 23:59:59 | Checked-in by: blac |

- Select the Assessment Version from the list (it will then be highlighted in blue).
- Click 'Check-Out'.

5. Viewing the Assessment

- Click on the 'Printed Assessment' button in the Assessment Version Management tab.

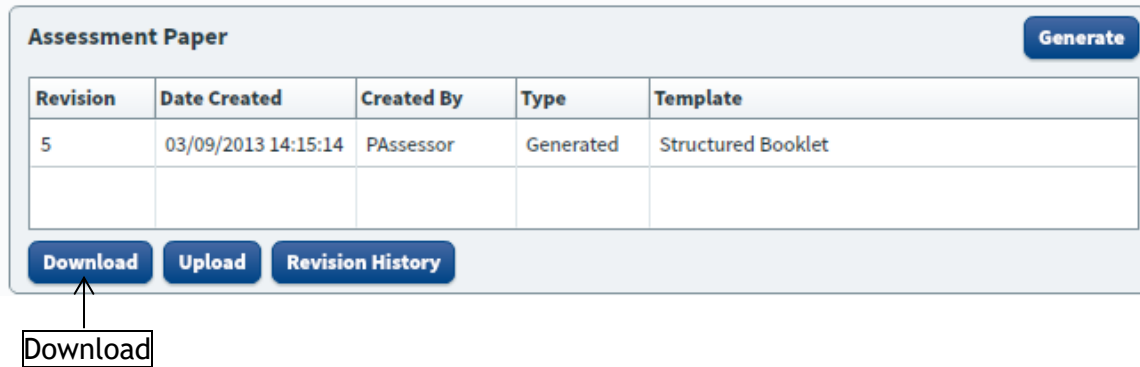
The screenshot shows the 'Assessment Version Management' tab in the SQA ItemBank system. On the left, there are filter options for 'Delivered on-screen', 'Delivered on paper', 'Subject', and 'Assessment'. The main table lists various assessment versions, including 'TEST NQ Assessment Training' (versions 1-8) and 'TEST PA Training Assessment' (versions 1-2). The 'Printed Assessment' button is highlighted in the bottom toolbar, with an arrow pointing to it from the text 'Printed Assessment' below the screenshot.

Printed Assessment

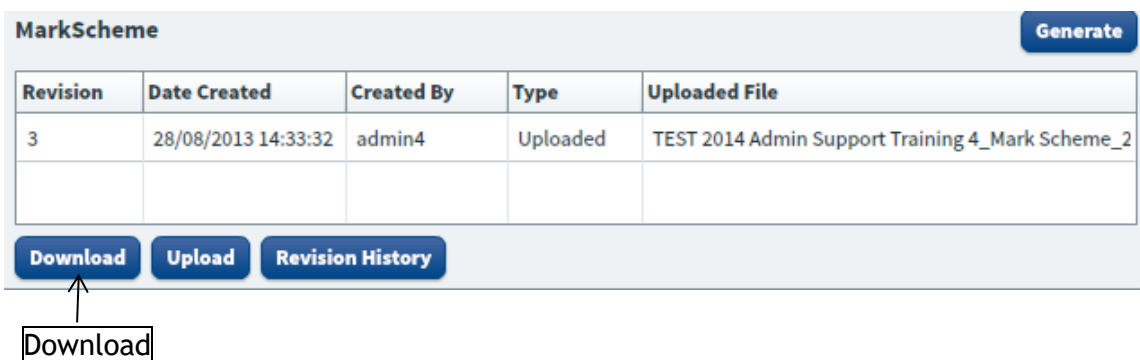
- Click on the question paper that you are currently working on in the Printed Assessments box.

The screenshot shows the 'Printed Assessments' window for 'TEST NQ Assessment Training Demo'. On the left, there is a list of printed assessments, with 'NQ Assessment Training Demo' selected. On the right, the detailed view of the selected assessment is shown, including fields for Name, Code, and buttons for Download, Edit, and Delete. It also shows sections for 'Assessment Paper' and 'MarkScheme', each with a table of revisions and buttons for Download, Upload, and Revision History.

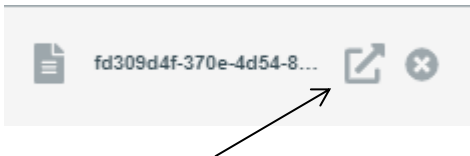
- To view the question paper click 'Download' in the Assessment Paper section.



- To view the marking instructions click 'Download' in the MarkScheme section.



- The file will now download.
- Close the blank browser tab that has appeared.
- An icon will appear in the Surpass Viewer window to indicate when the file has downloaded.



- Click the arrow icon to open the file, a compressed (zipped) folder.
- Within this folder you will see the Microsoft Word document. The file title will be the name of the question paper or marking instruction followed by Exam Paper or Mark Scheme and then the version number, eg, 2012 Fashion and Textile Technology Int 2_Exam Paper_1.docx
- You can then open this file in Word and view the question paper/marketing instruction.
- Close Word and return to the Printed Assessment screen in ItemBank.

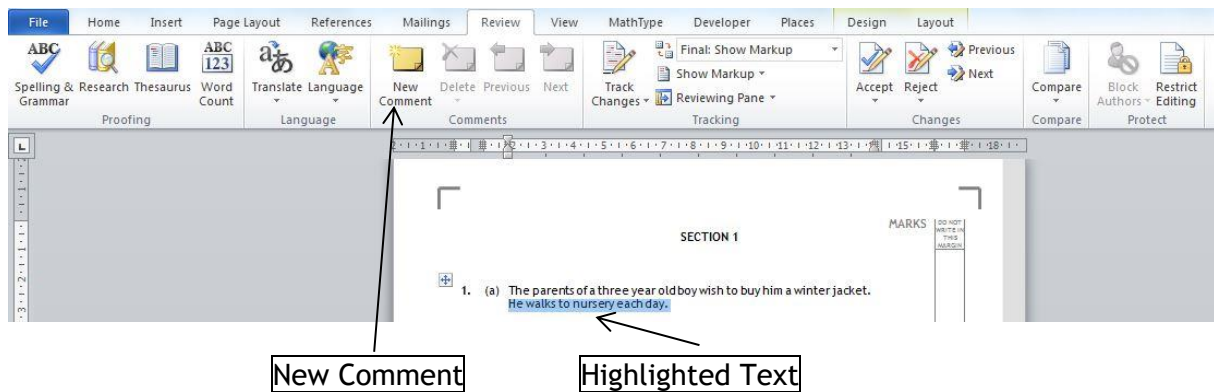
Note: Files are automatically downloaded to C:\Users\USERNAME\Downloads where USERNAME is your computer username. **You must delete** the question paper and marking instruction from this folder once you have finished.

- Once you have viewed the question paper and marking instructions proceed to the [Amending the Assessment](#) section on page 11 if you require any amendments.
- If no amendments are required proceed to the [Completing the Assessment](#) section on page 13.

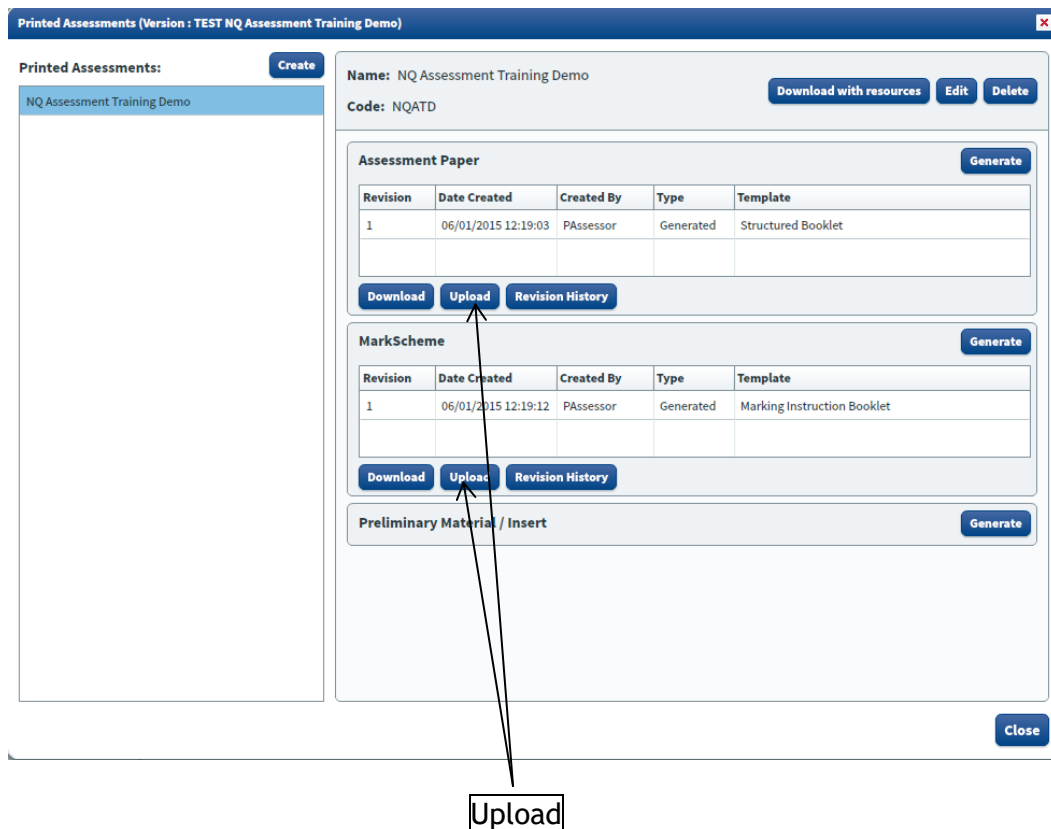
6. Amending the Assessment

Once you have viewed the complete assessment, you may notice that minor amendments to the content or layout are required. Instructions for viewing the assessment can be found in the [Viewing the Assessment](#) section (page 9).

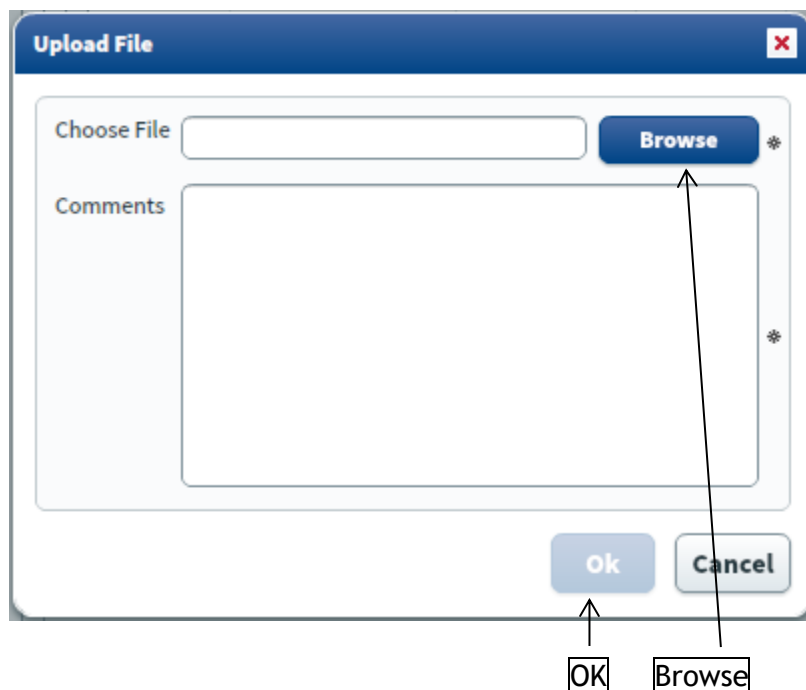
Minor amendments can be made as required. Alternatively, comments can be added to indicate where amends are required. The NQ Assessment team will use these comments to make the required amends.



- To mark up minor amendments on the question paper or marking instructions, highlight the text you wish to change, or position the cursor where you need the layout changed and select 'New Comment' from the 'Review' menu.
- Enter the amendment or instruction in the comment box.
- Select 'Save As' from the 'File' menu and save the amended question paper or marking instructions to your computer. Remember the filename and the folder where you have saved the question paper or marking instruction to.
- Close Word and return to the Printed Assessment screen in ItemBank.



- Click 'Upload' in either the Exam Paper or Mark Scheme section.



- Click 'Browse' and navigate to where you saved the question paper or marking instructions on your computer.
- Insert a comment in the Comments text box (eg Version 2) and click 'OK'. A comment is mandatory - it cannot be left blank, otherwise you cannot click 'OK'. (Please do not use the & symbol in the comment box as this causes an error to occur.)

Note: Following this, you must delete the question paper and marking instructions from your own computer.

7. Completing the Assessment

- Click 'Close' to close the Printed Assessments screen and return to the Assessment Version Management tab.

The screenshot shows a web application window titled "Printed Assessments (Version : TEST NQ Assessment Training Demo)". On the left, there is a sidebar with a "Printed Assessments:" header and a "Create" button. Below it, a list contains one item: "NQ Assessment Training Demo". The main content area is divided into several sections:

- Name:** NQ Assessment Training Demo (with "Download with resources", "Edit", and "Delete" buttons)
- Code:** NQATD
- Assessment Paper:** Includes a "Generate" button and a table with the following data:

| Revision | Date Created | Created By | Type | Template |
|----------|---------------------|------------|-----------|--------------------|
| 1 | 06/01/2015 12:19:03 | PAssessor | Generated | Structured Booklet |

Below the table are "Download", "Upload", and "Revision History" buttons.
- MarkScheme:** Includes a "Generate" button and a table with the following data:

| Revision | Date Created | Created By | Type | Template |
|----------|---------------------|------------|-----------|-----------------------------|
| 1 | 06/01/2015 12:19:12 | PAssessor | Generated | Marking Instruction Booklet |

Below the table are "Download", "Upload", and "Revision History" buttons.
- Preliminary Material / Insert:** Includes a "Generate" button.

At the bottom right of the window, there is a "Close" button. An arrow points from a larger "Close" box below the window to this button.

The screenshot displays the SQA ItemBank Assessment Management interface. It features a table of assessment versions with columns for Subject, Assessment Name, Assessment Version Name, Asses..., Sta..., Start Date, End Date, Start T..., End Ti..., and Checked-in/out Star. A filter panel on the left allows filtering by delivery method (on-screen, on paper), subject, assessment type (Draft, Quality Review, Live, Retired), and status (Checked-in, Checked-out). A date range filter is also present. At the bottom, there are buttons for 'Check-in', 'Undo Check-out', 'Check-out', 'Printed Assessment', 'Package Assessment Version', 'Create Assessment Version', 'Edit Assessment Version', and 'View Assessment Version'. A red box labeled 'Check-In' with an arrow points to the 'Check-in' button.

- Select the assessment version from the list (it will then be highlighted in blue) then click 'Check-In'.
- Notify the NQ Assessment team (question.papers@sqa.org.uk) that you have checked-in the assessment ready for the Assessment Review meeting.

Note: NQ Assessment staff will carry out any marked up changes before the question paper and marking instructions are printed and distributed in advance of the Assessment Review meeting.

8. Appendix - Troubleshooting

Issue

- You haven't received your password to access ItemBank.

Resolution

- Check the junk or spam filter in your e-mail. As an auto-generated e-mail your e-mail provider may incorrectly identify it as a spam e-mail.

Issue

- Some elements of ItemBank appear to be cut off the screen or buttons appear to be inaccessible.

Resolution

- Check that your screen resolution is set to the minimum recommended in the computer specification (1024 x 768).
- Before logging in to ItemBank, set your Internet browser to full screen, commonly accessed by pressing F11 on your keyboard. (Once you have finished using ItemBank press F11 again to exit full screen mode.)

Issue

- Cannot find the amended question paper or marking instructions which you have saved.

Resolution

- Check the recent files list in Microsoft Word, commonly accessed via the File menu or Office menu depending on what version of Microsoft Word you are using.
- Search for the file on your computer. The filename will be in the format:
Year Subject Level_Exam Paper/Mark Scheme_Version Number.docx
eg 2014 Classical Greek National 5_Exam Paper_1.docx

Issue

- When entering the username and password you are getting a "User validation failed" message

Resolution

- Check that you have entered your username and password correctly. The password is case sensitive so check you haven't got Caps Lock switched on.
- Check that you have entered the correct web address for ItemBank. The web address should contain the word itembank and the login screen should show ItemBank as in the following screenshot:

