



# **Surpass ItemBank Guidance for Principal Assessors viewing Assessments**

**January 2015**

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

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### 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:

**Step 1:** Log in to ContentProducer and select items for the Assessment

**Step 2:** E-mail SQA's NQ Assessment team with details of the items selected

**Step 3:** SQA's NQ Assessment team will create the Assessment in ItemBank and e-mail you when the Assessment is ready for viewing.

**Step 4:** Log In to ItemBank

**Step 5:** 'Check Out' the Assessment Version

**Step 6:** View the 'Printed Assessment' (ie the complete question paper and marking instructions)

**Step 7:** If necessary, mark up any minor amendments required to the question paper and marking instructions & upload to ItemBank

**Step 8:** E-mail SQA's NQ Assessment team to advise that the question paper and marking instructions are now ready.

**Step 9:** SQA's NQ Assessment team will issue paper copies of the question paper and marking instructions to the Question Paper Reviewers, the Principal Assessor and the Qualifications Manager/Officer.

**Step 10:** Assessment Review Meeting held and any changes are made to the question paper and marking instructions.

**Step 11:** Reviewed Assessment approved.

## 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	<a href="mailto:question.papers@sqa.org.uk">question.papers@sqa.org.uk</a> 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](mailto: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.

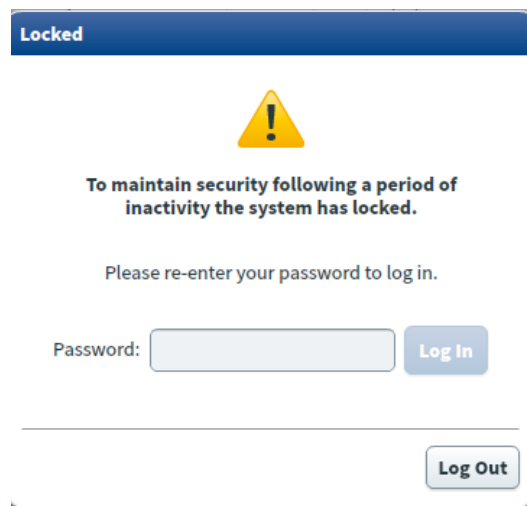
- Follow the link in the e-mail.
- Enter your username and password. Please note the password is case sensitive.



- Click 'Log In'.

(b) System Lock

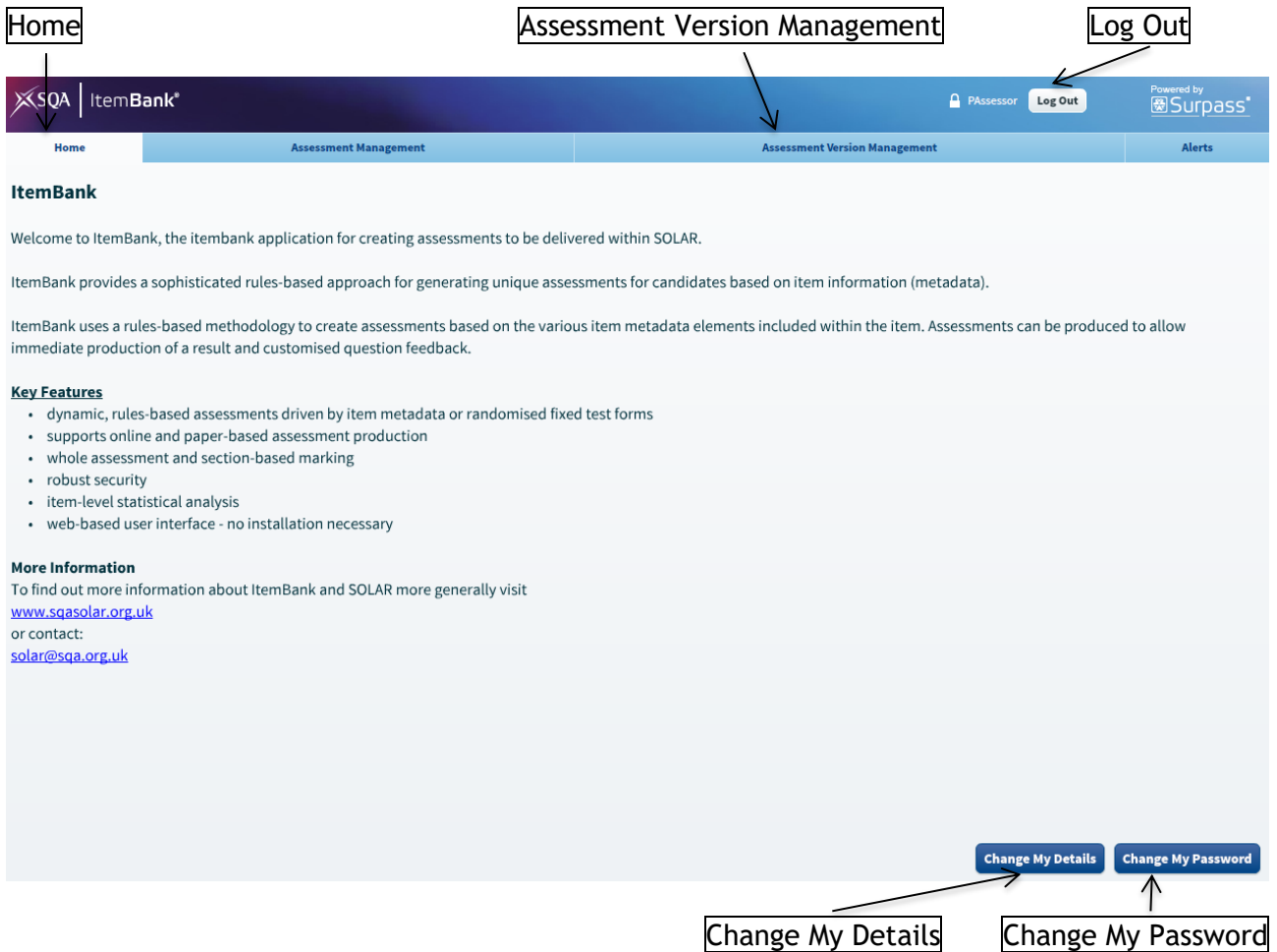
After a period of inactivity, ItemBank will lock you out and you will have to re-enter your password.



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

(c) Homepage

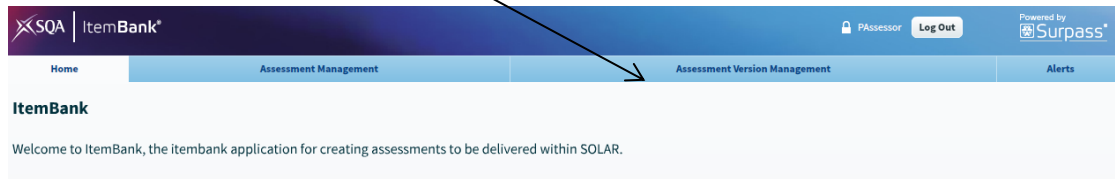
This is the ItemBank homepage.



- 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.

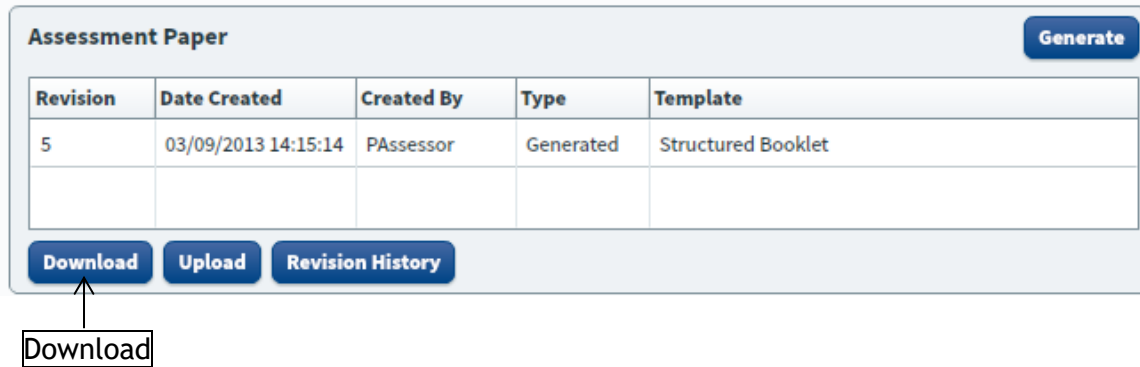
The screenshot shows the 'Assessment Version Management' tab in the SQA ItemBank system. On the left, there are filter options for 'Delivered on-screen', 'Delivered on paper', 'Subject', and 'Assessment'. The main area contains a table with the following columns: Subject, Assessment Name, Assessment Version Name, Asses..., Sta..., Start Date, End Date, Start T..., End Ti..., and Checked-in/out Sta... The table lists several assessment versions, including 'TEST NQ Assessment Training' (versions 1-8) and 'TEST 2014 PA Training Paper 1' and '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

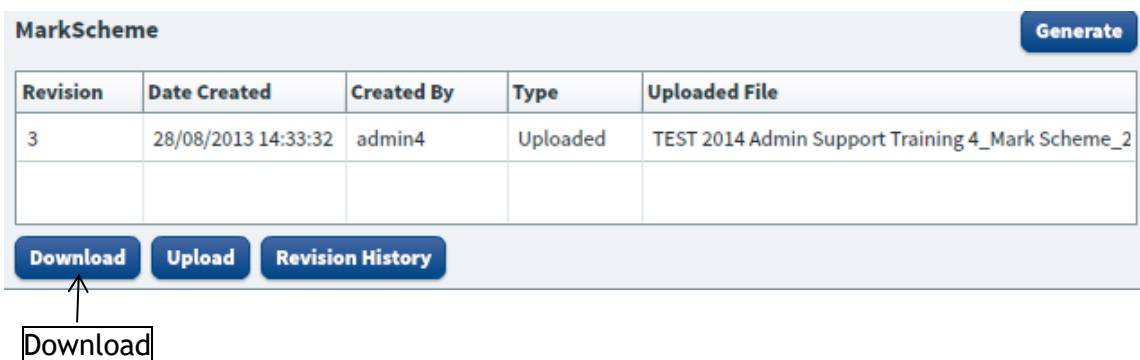
- Click on the question paper that you are currently working on in the Printed Assessments box.

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 details for this assessment are shown, including the name 'NQ Assessment Training Demo', code 'NQATD', and buttons for 'Download with resources', 'Edit', and 'Delete'. Below this, there are sections for 'Assessment Paper' and 'MarkScheme', each with a table of revisions and buttons for 'Download', 'Upload', and 'Revision History'. A 'Close' button is located at the bottom right.

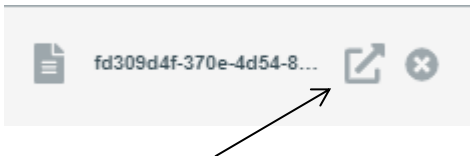
- To view the question paper click 'Download' in the Assessment Paper section.



- 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/marking instruction.
- Close Word and return to the Printed Assessment screen in ItemBank.

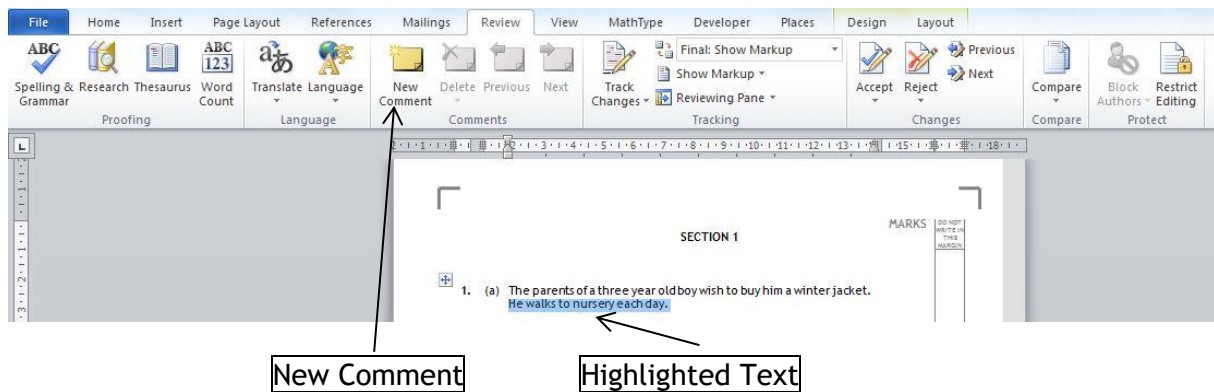
**Note:** Files are automatically downloaded to C:\Users\USERNAME\Downloads where USERNAME is your computer username. **You must delete** the question paper and marking instruction from this folder once you have finished.

- 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.

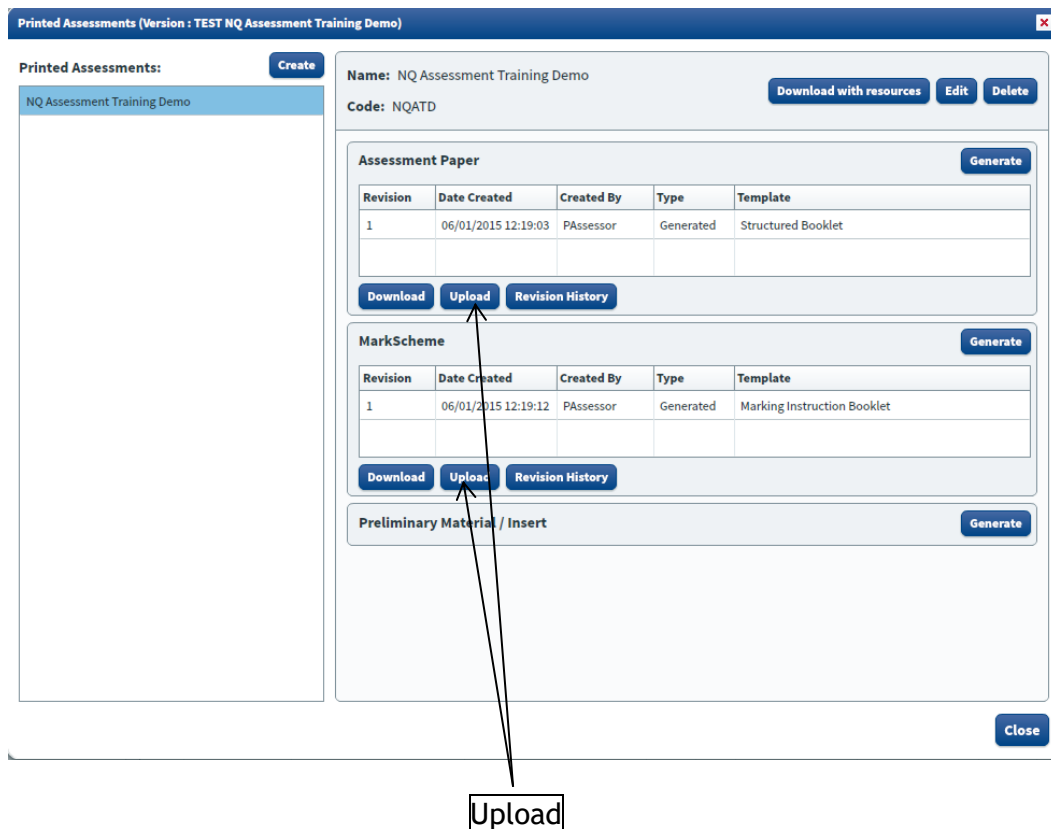
## 6. Amending the Assessment

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).

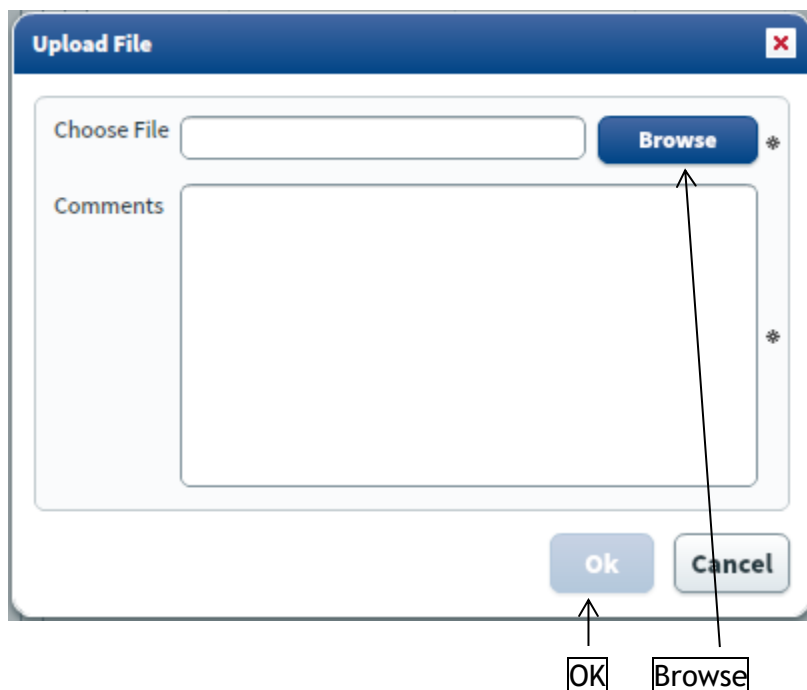
Minor amendments can be made as required. Alternatively, comments can be added to indicate where amends are required. The NQ Assessment team will use these comments to make the required amends.



- 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 "Printed Assessments:" and a "Create" button, and a list containing "NQ Assessment Training Demo". The main content area displays details for the selected assessment:

- 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 one row: Revision 1, Date Created 06/01/2015 12:19:03, Created By PAssessor, Type Generated, Template Structured Booklet. Below the table are "Download", "Upload", and "Revision History" buttons.
- MarkScheme:** Includes a "Generate" button and a table with one row: Revision 1, Date Created 06/01/2015 12:19:12, Created By PAssessor, Type Generated, Template 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" text box below the window to this button.

The screenshot displays the SQA ItemBank Assessment Management interface. The main area contains a table of assessment versions. The table has the following columns: Subject, Assessment Name, Assessment Version Name, Asses..., Sta..., Start Date, End Date, Start T..., End Ti..., and Checked-in/out Star. The table lists several assessment versions, including 'TEST QM Training' and 'TEST PA Training'. A filter sidebar on the left allows for filtering by delivery method (on-screen or on paper), subject, assessment type, and date range. At the bottom of the interface, there is a 'Check-In' button, which is highlighted with a blue border. An arrow points from a 'Check-In' label below the screenshot to this button.

Check-In

- 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](mailto: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:

