



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

**January 2015**

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

### Summary of Revisions from Version 1

Section	Page	Revision
Whole guide		Revised screenshots
Computer Specification	6	Revised Computer Specifications
Logging In and Homepage	7	Revisions to how passwords are issued
Carrying out a simple search in ItemBank	12	Revisions to process for searching
Narrowing down or amending your search in ItemBank	14	Renamed section from Carrying out a complex search in ItemBank. Added Edit Parameter functionality.
Free Text - Year Coding	34	Added new search parameter allowing filtering out of items used in a particular year
Workflow Status	38	Added new search parameter allowing all available items to be viewed
Appendix - Troubleshooting	39	Added new Troubleshooting section

### Summary of Revisions August 2016

Section	Page	Revision
Computer Specification	6	Minor revisions to Computer Specifications
Appendix - Troubleshooting	39	Added new User validation failed issue

### Summary of Revisions July 2017

Section	Page	Revision
Viewing the Assessment - Question Paper	20	Addition to instructions on adding comments
Viewing the Assessment - Marking Instructions	22	Addition to instructions on adding comments
Amending Content	27	Addition to instructions on adding comments
Amending Content	27	Revision to state that content can be amended

### Summary of Revisions January 2021

Section	Page	Revision
Computer Specification	6	Revised Computer Specifications
Item Search Results	15	Revised instructions for previewing an item
Arranging Selected Items	16	Revised instructions for previewing an item
Reselecting or Rearranging Items	24	Revised instructions for previewing an item
Viewing the Assessment - Question Paper	20	Revised instructions for viewing a question paper and marking instruction
Viewing the Assessment - Marking Instructions	22	Revised instructions for viewing a question paper and marking instruction

### Summary of Revisions March 2021

Section	Page	Revision
Item Search Results	15	Revised instructions for previewing an item
Arranging Selected Items	16	Revised instructions for previewing an item
Reselecting or Rearranging Items	24	Revised instructions for previewing an item
Viewing the Assessment - Question Paper	20	Revised instructions for viewing a question paper and marking instruction
Viewing the Assessment - Marking Instructions	22	Revised instructions for viewing a question paper and marking instruction

# Contents

<b>1. Assessment Creation Overview</b>	<b>5</b>
<b>2. Getting Started</b>	<b>6</b>
(a) Computer Specification	6
(b) Key Contacts	6
(c) Security	6
<b>3. Logging In and Homepage</b>	<b>7</b>
(a) Logging In	7
(b) System Lock	7
(c) Homepage	8
<b>4. 'Check Out' the Assessment Version and Select Items</b>	<b>9</b>
(a) The Assessment Version Management tab	9
(b) Editing Assessment Versions	10
(c) Carrying out a simple search in ItemBank	12
(d) Narrowing down or amending your search in ItemBank	14
(e) Item Search Results	15
(f) Arranging Selected Items	16
<b>5. Viewing the Assessment</b>	<b>19</b>
<b>6. Amending the Assessment</b>	<b>24</b>
(a) Reselecting or Rearranging Items	24
(b) Amending Content	27
<b>7. Completing the Assessment</b>	<b>30</b>
<b>8. Appendix - Search Parameters</b>	<b>31</b>
(a) Fixed Ref	32
(b) Free Text	33
(c) Free Text - Year Coding	34
(d) Specific Item	35
(e) Item Name	36
(f) Folder Reference	37
(g) Workflow Status	38
<b>9. Appendix - Troubleshooting</b>	<b>39</b>

# 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:

- select items to include in a question paper
- decide on the order that items should appear in the question paper
- 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 ItemBank

**Step 2:** 'Check Out' the Assessment Version

**Step 3:** Search through items in the item bank & select specific items to include in the question paper

**Step 4:** View the 'Printed Assessment' (ie the complete question paper and marking instructions)

**Step 5:** If necessary, reselect items for the question paper and/or change the order in which items appear in the question paper

**Step 6:** If necessary, make/mark up any minor amendments required to the question paper and marking instructions & upload to ItemBank

**Step 7:** E-mail SQA's NQ Assessment team to advise that the question paper and marking instructions are now ready.

**Step 8:** 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 9:** Assessment Review Meeting held, and any changes are made to the question paper and marking instructions.

**Step 10:** 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	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.

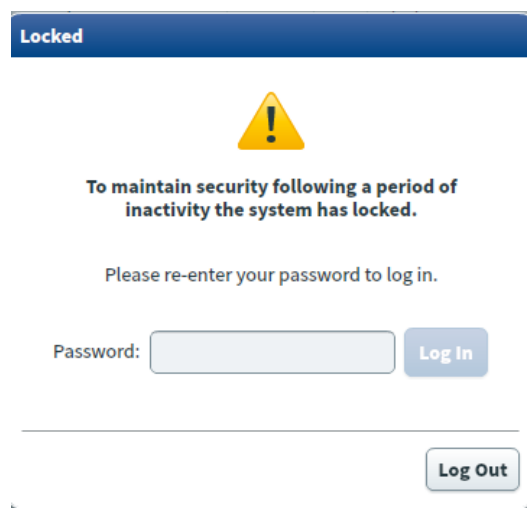


The screenshot shows the 'Please Log In' window for SQA ItemBank. It features the SQA logo and 'ItemBank®' text. Below this are input fields for 'User Name:' and 'Password:', followed by a 'Log In' button. At the bottom, there is a 'Surpass®' logo and a copyright notice: '© BTL Group Ltd, 2001 - 2013, All Rights Reserved'.

- 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.

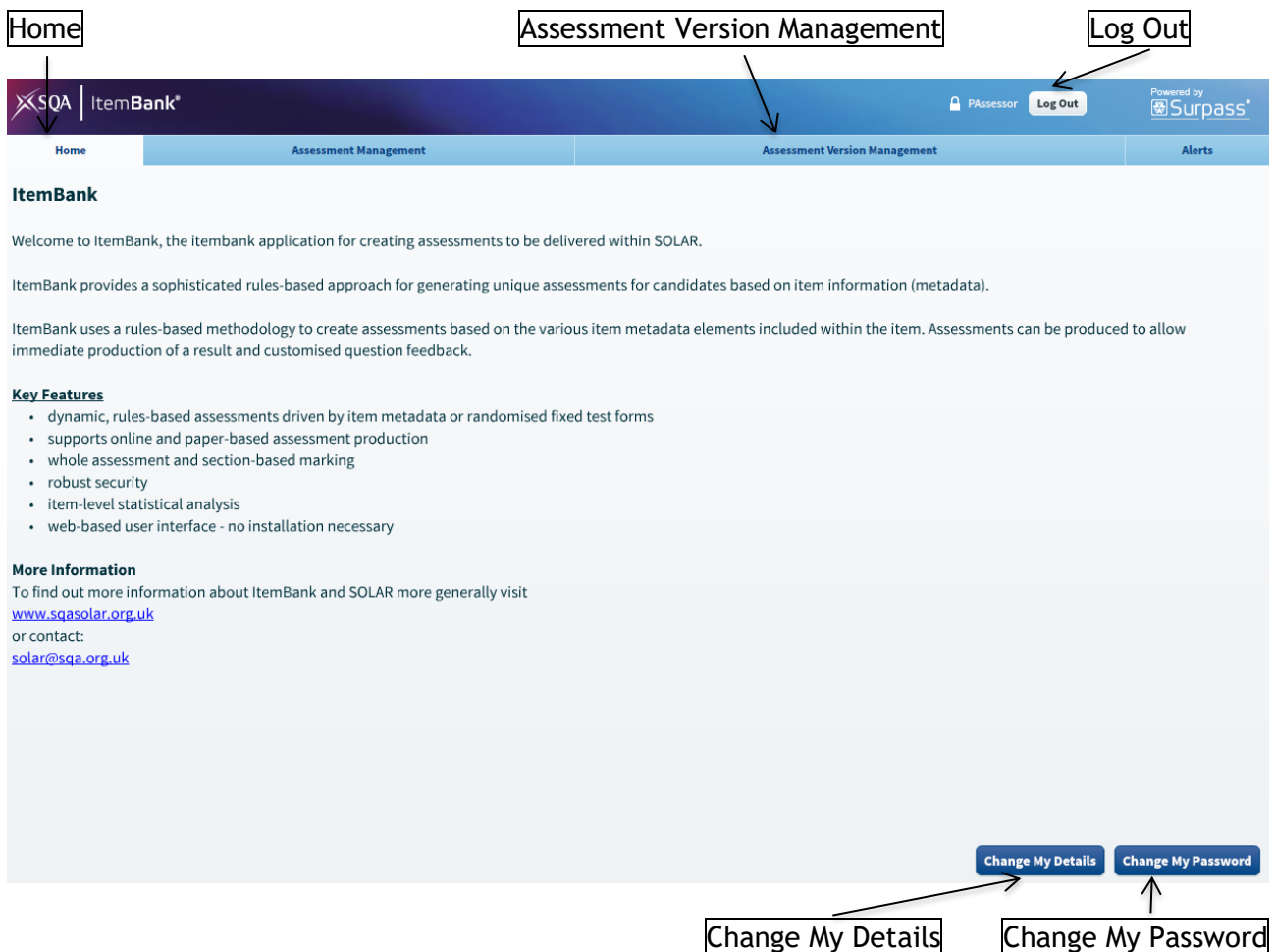


The screenshot shows the 'Locked' screen. It has a blue header with the word 'Locked'. Below this is a yellow warning triangle icon. The text reads: 'To maintain security following a period of inactivity the system has locked.' and 'Please re-enter your password to log in.' There is a 'Password:' input field, a 'Log In' button, and a 'Log Out' button at the bottom right.

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

(c) Homepage

This is the ItemBank homepage.



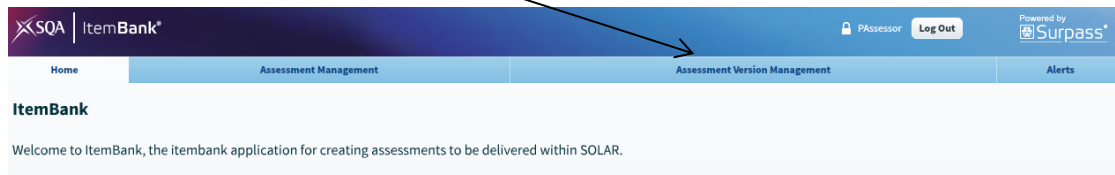
- Clicking on any of the tabs along the top of the page will take you to the relevant screen - 'Home' or 'Assessment Version Management'.
- To log out of ItemBank use the 'Log Out' button at the top of the screen.
- To change any of your details (name or e-mail address) use the 'Change My Details' button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

### (a) The Assessment Version Management tab

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



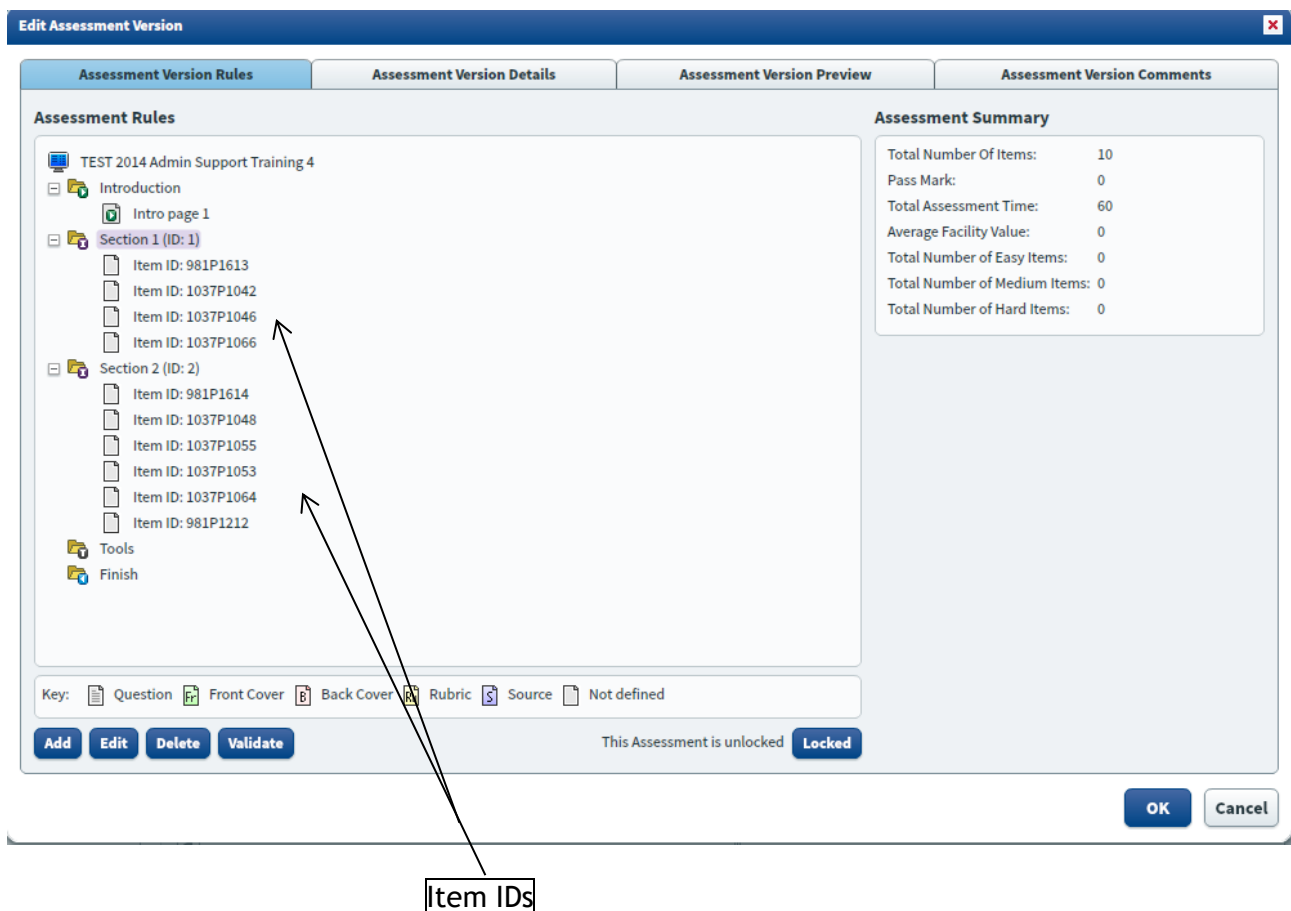
An 'Assessment Version' refers to a question paper for a specific year. Within this tab you should see a list of any question papers for which you are responsible. Please get in touch with NQ Assessment if you do not see your question papers. The Assessment Version Name column will indicate the year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

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

- To edit an Assessment Version first select it from the list (it will then be highlighted in blue).
- Click 'Check-Out'.
- Click 'Edit Assessment Version'.

## (b) Editing Assessment Versions

You will then be presented with the Edit Assessment Version screen.



The structure of the question paper will be reflected in the layout of this screen, ie, you will see if it is split into separate sections. If the question paper is not split into separate sections, you will see just one section.

In the example above, the question paper has a Section 1 and a Section 2.

**Note:** when you first start working on a question paper, it may look as if some items have already been selected for the question paper (as indicated by 'Item IDs'). These 'items' are in fact standardised text that has been set up by SQA to appear in your question paper. For example, the 'Item IDs' shown in the screen above refer to the following text which has already been inserted:



**Note:** You must not edit/delete these existing items.

- To select items for a section in the question paper, first select a section (it will then be highlighted in pink) and then click 'Add'.

**Edit Assessment Version**

Assessment Version Rules | Assessment Version Details | Assessment Version Preview | Assessment Version Comments

**Assessment Rules**

- TEST 2014 QM Training Structured
  - Introduction
    - Intro page 1
  - Section 1 (ID: 1)
    - Item ID: 981P1183
    - Item ID: 981P1180
  - Section 2 (ID: 2)
    - Item ID: 981P1182
    - Item ID: 981P1181
    - Item ID: 981P1178
  - Tools
  - Finish

Key: Question Front Cover Back Cover Rubric Source Not defined

Add Edit Delete Validate

This Assessment is unlocked Locked

**Assessment Summary**

- Total Number Of Items: 5
- Pass Mark: 0
- Total Assessment Time: 60
- Average Facility Value: 0
- Total Number of Easy Items: 0
- Total Number of Medium Items: 0
- Total Number of Hard Items: 0

OK Cancel

Add

You will then be presented with the Fixed Section screen.

Search Items

**Section 1 (Fixed)**

Search Items

**Selected Items**

Order	Item ID	Name	Usage Count	Facility Value	Item Type	Marked Metadata	Total Mark	Workflow Status
1	981P1183	Section 1 Heading	0	0.5	Not defined		1	Released
2	981P1180	End of Section 1	0	0.5	Not defined		1	Released

Selected Items: 2 Average Usage: 0

Preview Item Remove Item

Item Statistics	Easy	Medium	Hard	Average PV
Assessment	0	0	0	0.00
Section	0	0	0	0.00

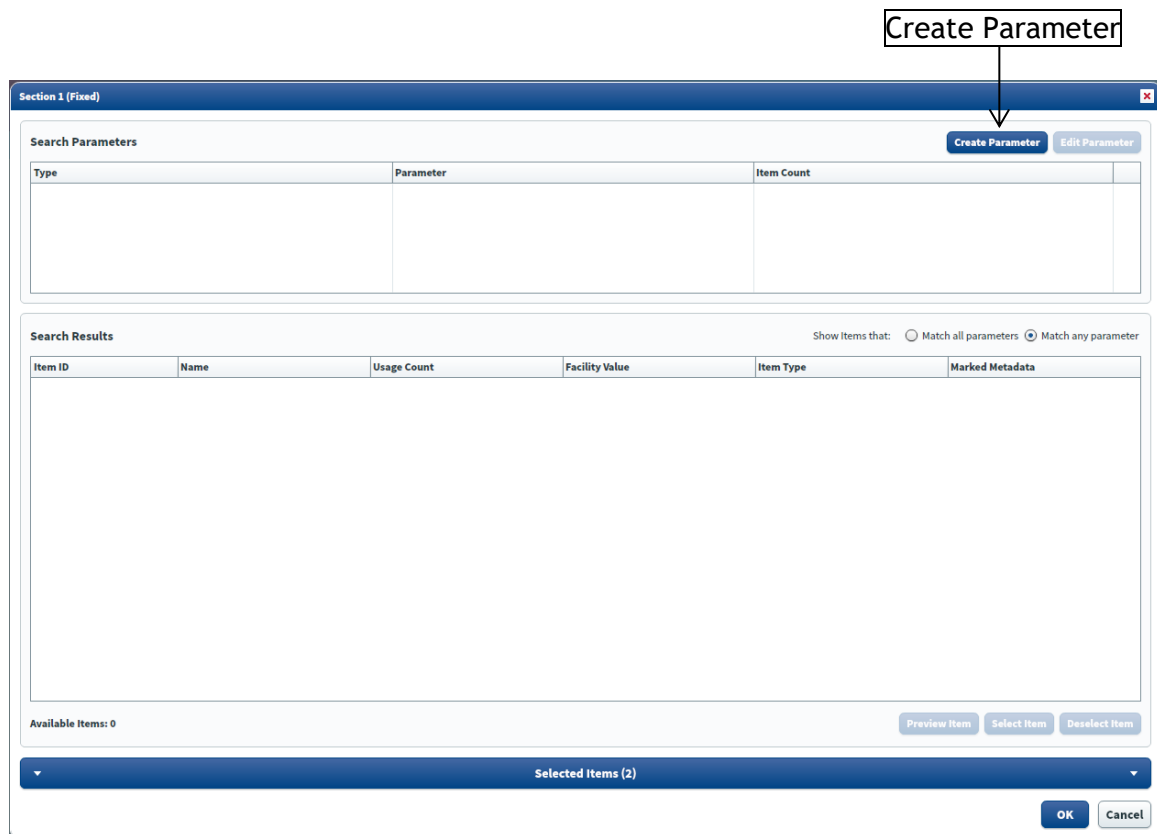
OK Cancel

This is the screen which allows you to search through the bank for specific items you want to include in the question paper. To search for items, click on 'Search Items'.

(c) Carrying out a simple search in ItemBank

- To start searching for items click 'Create Parameter'.

**Create Parameter**



**Section 1 (Fixed)**

**Search Parameters**

Type	Parameter	Item Count
------	-----------	------------

**Search Results**

Show items that: ☐ Match all parameters ☒ Match any parameter

Item ID	Name	Usage Count	Facility Value	Item Type	Marked Metadata
---------	------	-------------	----------------	-----------	-----------------

Available Items: 0

Preview Item Select Item Deselect Item

**Selected Items (2)**

OK Cancel

The screenshot shows the 'Create Parameter' dialog box with four main sections and three buttons at the bottom. Annotations with arrows point to specific elements:

- Select Type:** Points to the 'Fixed Ref' dropdown in the 'Step 1: Select Type' section.
- Select Projects:** Points to the 'Step 2: Select Projects' section, which contains three checkboxes: 'Higher Paper Assessment Templates', 'Int 2 Fashion and Textile Technology', and 'N5 Paper Assessment Templates'.
- Select Reference:** Points to the 'Step 3: Select Reference' section, which is currently empty.
- Select Value:** Points to the 'Step 4: Select Value' section, which contains a dropdown menu.
- Available Items:** Points to the text 'Available Items: -' at the bottom right.
- Create:** Points to the 'Create' button at the bottom right.
- Done:** Points to the 'Done' button at the bottom right.

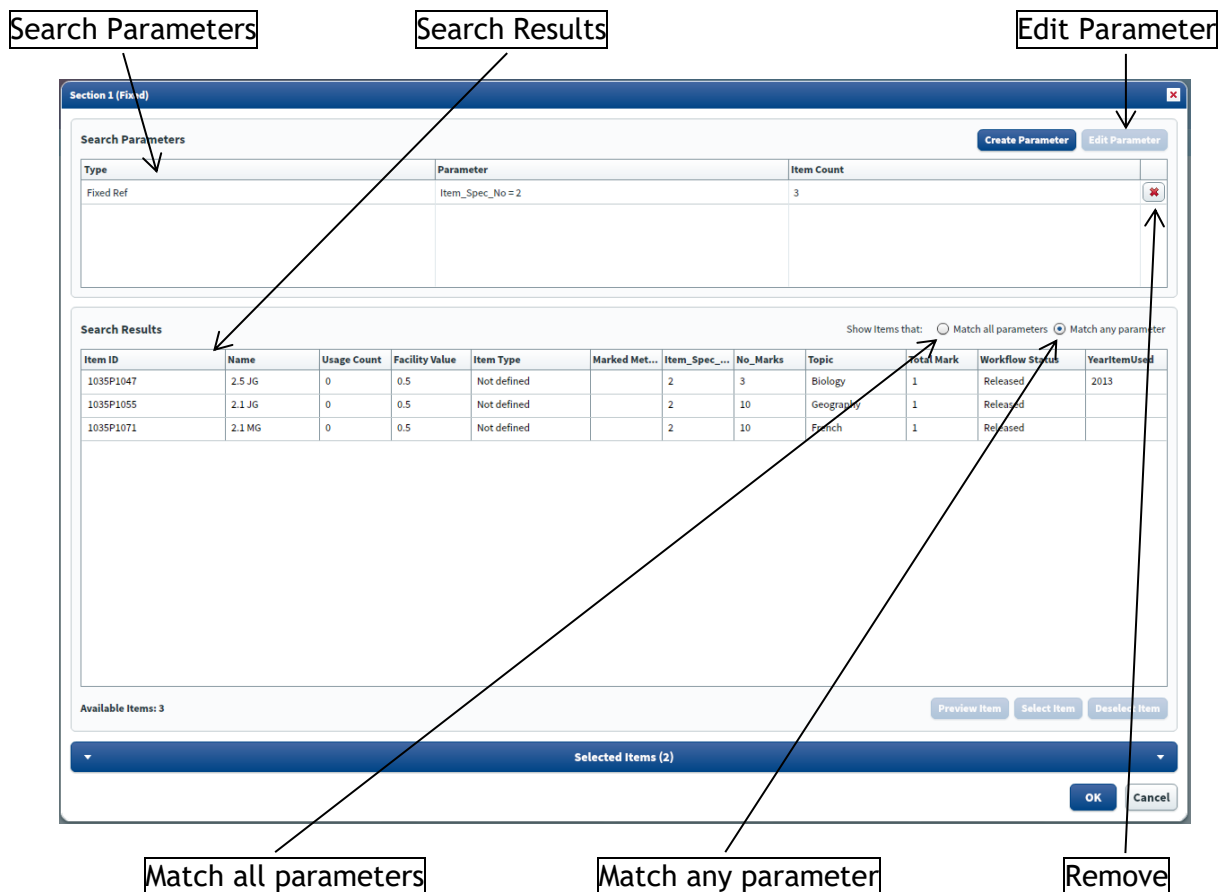
- Select 'Fixed Ref' from the 'Select Type' drop-down menu.
- Select your subject by checking the checkbox in the 'Select Projects' menu.
- Select a metadata field by clicking on the row in the 'Select Reference' menu.
- Select a value from the 'Select Value' drop-down menu.

'Available Items' will display the number of items that match the criteria specified.

- Click 'Create'.
- Click 'Done'.

**Note:** For other methods of searching for items in ItemBank please see the [Appendix - Search Parameters](#) section (page 31).

After clicking on 'Done' you will return to the Fixed Section screen where you will see the Search Parameters you have applied and the Search Results



(d) Narrowing down or amending your search in ItemBank

If your search has returned many items, then you may want to narrow down your search further before looking at items that have been returned in the search. You can do this by applying multiple parameters.

- To apply another parameter to a simple search simply repeat the steps for carrying out a simple search using your additional search parameters.
- These parameters can be combined using either 'Match all parameters' or 'Match any parameters', ie, the results will be based on a match from all the parameters combined or a match from any of the individual parameters.

If your search did not find the items that you wanted, then you may want to amend your search.

- To edit a parameter, select the parameter row in the Search Parameters box (it will then be highlighted in blue), then click 'Edit Parameter'.
- To remove any parameters, click on the red 'Remove' cross beside the entry in the Search Parameters section.

### (e) Item Search Results

The items that have been returned in your search will appear in the Item Search Results table on the screen.

**Section 1 (Fixed)**

**Search Parameters**

Type	Parameter	Item Count
Fixed Ref	Item_Spec_No = 2	3

**Search Results**

Show Items that: ☐ Match all parameters ☒ Match any parameter

Item ID	Name	Usage Count	Facility Value	Item Type	Marked Met...	Item_Spec_...	No_Marks	Topic	Total Mark	Workflow Status	YearItemUsed
103SP1047	2.5 JG	0	0.5	Not defined		2	3	Biology	1	Released	2013
103SP1055	2.1 JG	0	0.5	Not defined		2	10	Geography	1	Released	
103SP1071	2.1 MG	0	0.5	Not defined		2	10	French	1	Released	

Available Items: 3

**Selected Items (2)**

Buttons: Preview Item, Select Item, Deselect Item, OK, Cancel

Labels with arrows:

- Item Rows
- Selected Items
- Preview Item
- Select Item

- The Item Search Results can be sorted by clicking on any of the 'Column Headings' once. Clicking again on the 'Column Headings' sorts the results in the opposite order.
- If you wish to view the content of a specific item **before** deciding whether to select it for the question paper, select the 'Item Row' and click 'Preview Item'.
- The item will now download.
- Close the blank browser tab that has appeared.
- An icon will appear in the Surpass Viewer window to indicate when the item has downloaded.



- Click the arrow icon to open the file in Microsoft Word. Close Word when you have finished looking at the item.

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

- If you wish to select one of the items for the question paper, select the 'Item Row' and click 'Select Item'. Repeat this to select further items.
- The item(s) you have selected for the question paper will appear in the Selected Items section which can be accessed by clicking 'Selected Items'.

## (f) Arranging Selected Items

The screenshot shows a window titled "Section 2 (Fixed)" with a search bar and a table of "Selected Items". The table has columns: Order, Item ID, Name, Usage C..., Facility Va..., Item Type, Marked..., ItemSpe..., Keywords, MarkBre..., Section, Topic, Total Mark, Workflow Status, and Yearite... The table contains 5 rows of data. Below the table, there are buttons for "Up", "Down", "Preview Item", and "Remove Item". A label "Name Column" points to the "Name" column header. A label "Item Rows" points to the table rows. A label "Up" points to the "Up" button, "Down" to the "Down" button, "Preview Item" to the "Preview Item" button, and "Remove Item" to the "Remove Item" button.

- If you wish to view one of the items that you have selected, select the 'Item Row', and click 'Preview Item'.
- The item will now download.
- Close the blank browser tab that has appeared.
- An icon will appear in the Surpass Viewer window to indicate when the item has downloaded.



- Click the arrow icon to open the file in Microsoft Word. Close Word when you have finished looking at the item.

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

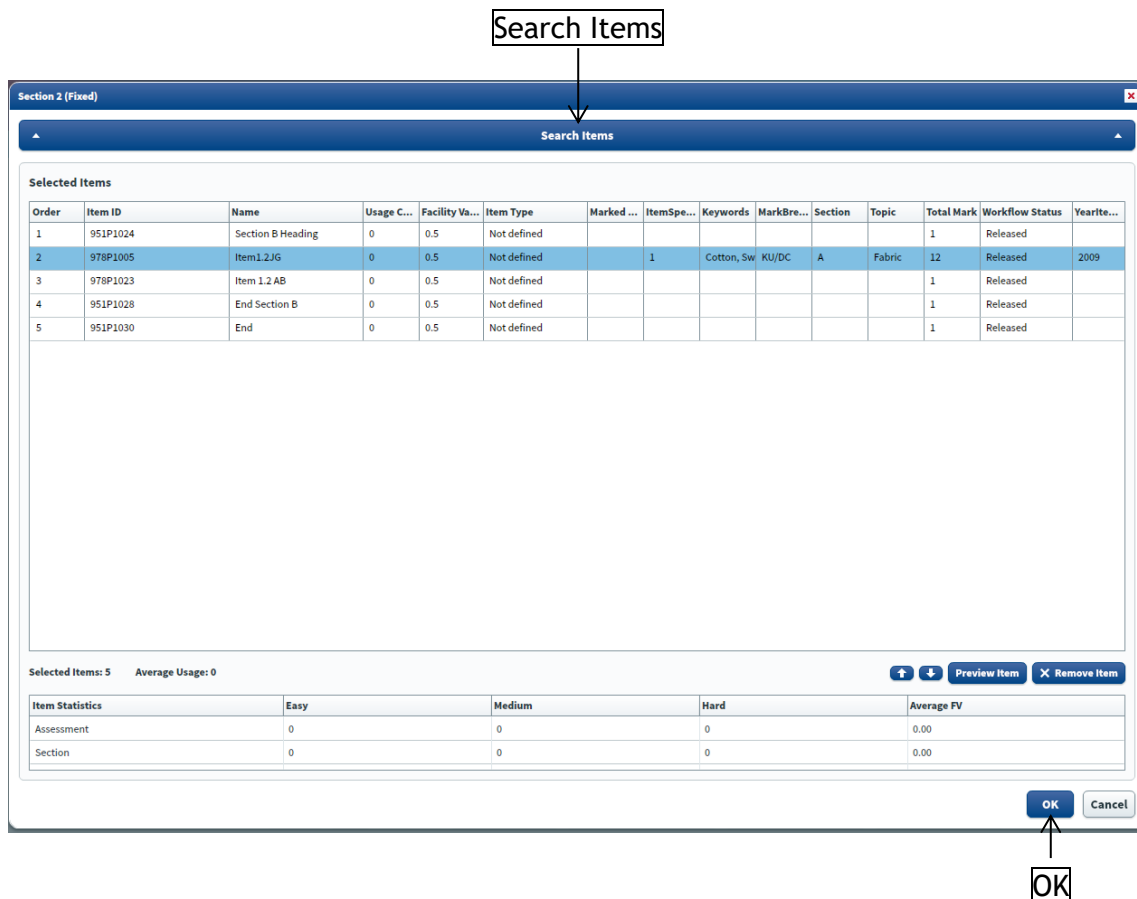
- If you want to change the order that items will appear in the question paper, select the 'Item Row', and use the 'Up' and 'Down' arrow buttons.

**Note:** Please remember that the question paper will be set up by SQA with items that contain standardised text. Any such items can be easily identified using the 'Name Column'. You must ensure that these items appear in the correct positions, ie, Section 1 Heading should be the first item in the list and End Section 1 should be the last item in the list.

- If you wish to delete one of the items that you have selected, select the 'Item Row', and click 'Remove Item'.

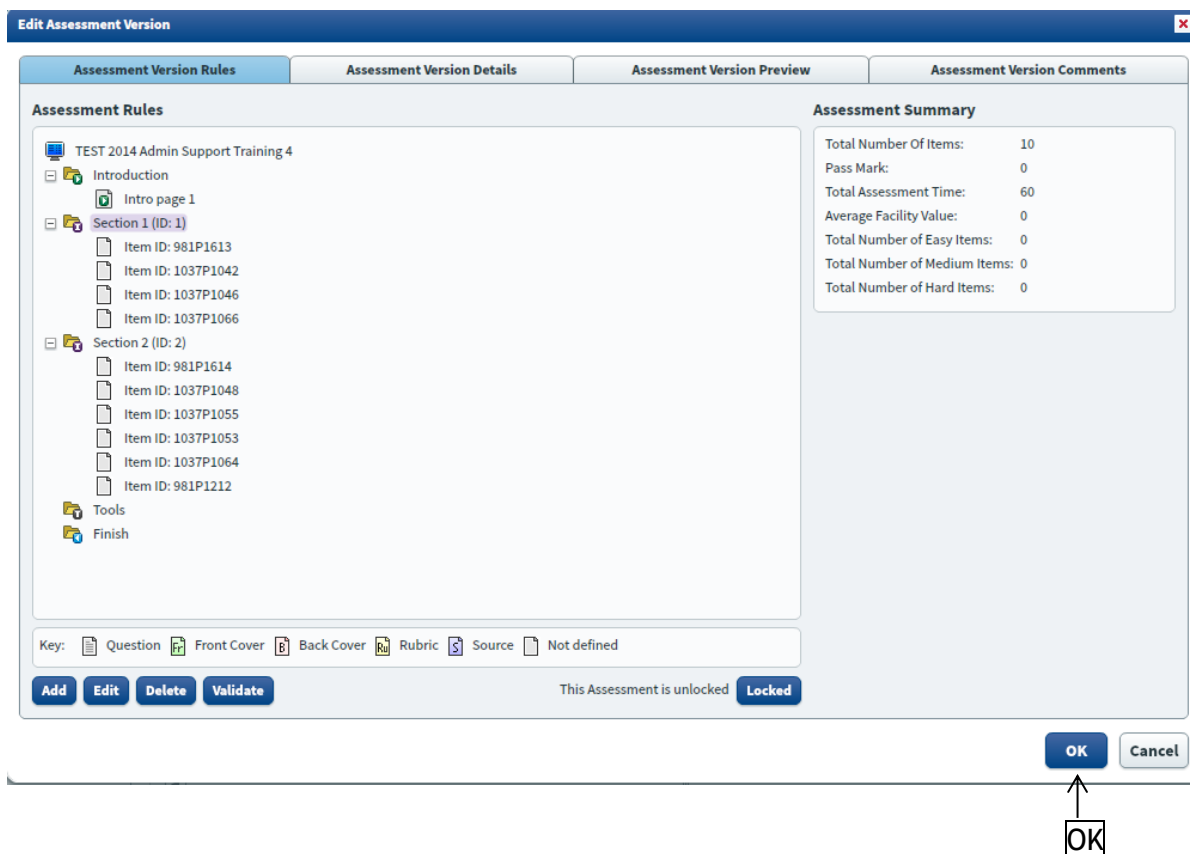


- If you need to return to carry out a further search for an item, click 'Search Items'.



- Once you have selected and arranged all the items click 'OK'.

You will return to the Edit Assessment Version screen.



**Note:** If your question paper has more than one section, you should repeat this item selection process for the other sections. Return to the [Editing Assessment Versions](#) section (page 10).

Once you have selected all items for all sections of the question paper click 'OK'.

## 5. Viewing the Assessment

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

Printed Assessment

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

Generate

(a) Question Paper

- Click on the Generate button next to Assessment Paper.

You will then be presented with the Generate (Assessment Paper) window.

Generate (Assessment Paper)

Printed Assessment Details

Choose template: [dropdown menu] \*

Comments: [text area] \*

OK Cancel

Choose template

OK

- In the 'Choose template' drop down menu select the correct booklet template. The booklet template will be:
  - Level Paper Assessment Templates - Structured Booklet (a question/answer booklet)
  - Level Paper Assessment Templates - Unstructured Booklet (a question only booklet)
  - Level Paper Assessment Templates - Transcript or Word List Booklet (a transcript or word list).
- Insert a comment in the Comments text box (eg, Version 1) 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.)

The following will appear in the Assessment Paper section.

Assessment Paper

Generate

Revision	Date Created	Created By	Type	Template
5	03/09/2013 14:15:14	PAssessor	Generated	Structured Booklet

Download Upload Revision History

Download

- To view the question paper, click 'Download'.
- 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.

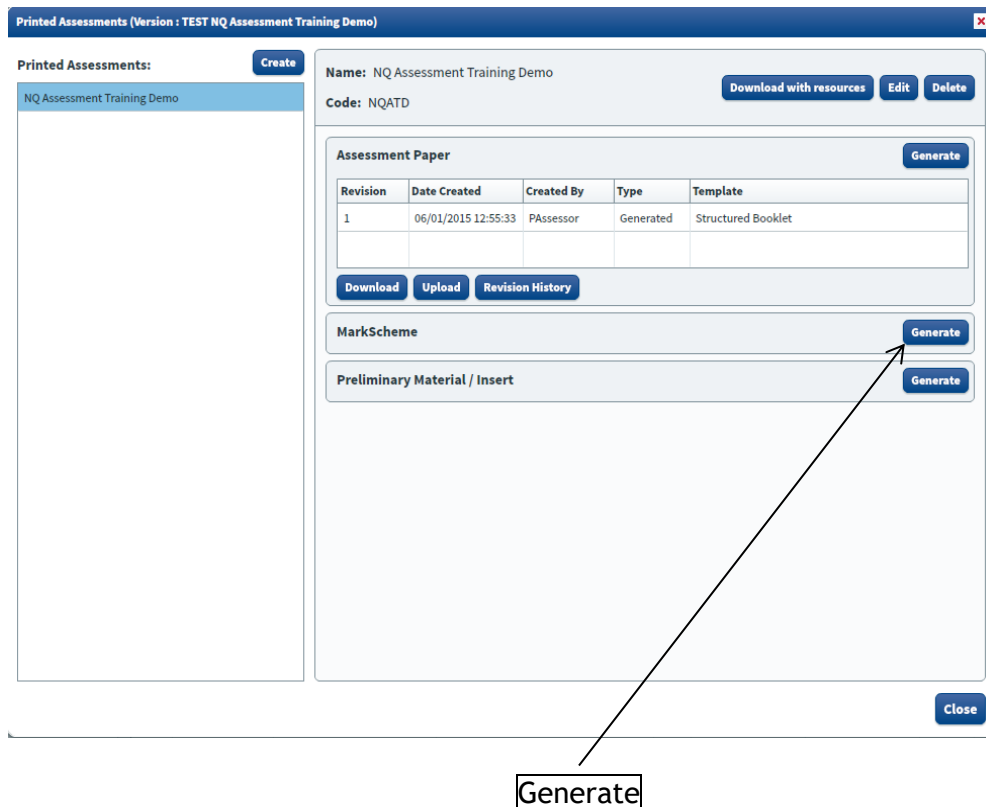


- Click the arrow icon to open the file, a compressed (zipped) folder.
- Within this folder you will see the Microsoft Word document. The file title will be the name of the question paper followed by Exam Paper and then the version number, eg, 2012 Fashion and Textile Technology Int 2\_Exam Paper\_1.docx
- You can then open this file in Word.

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

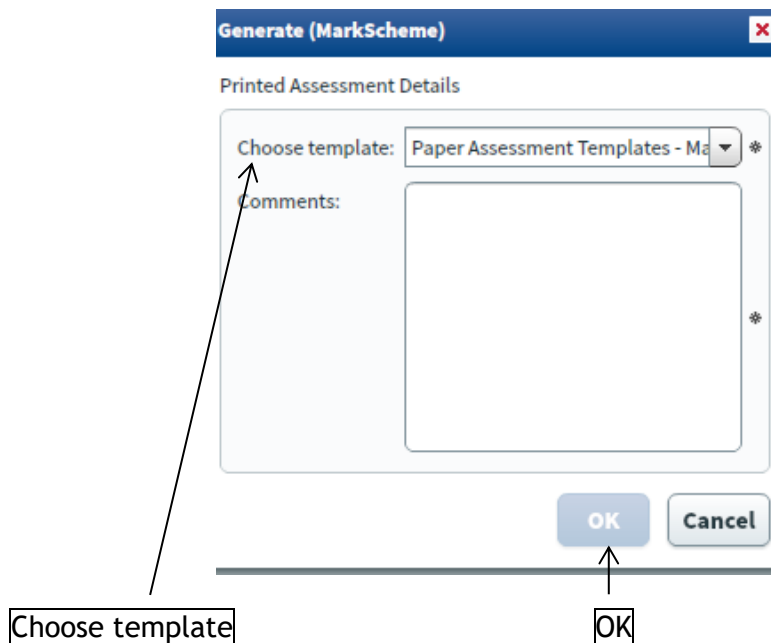
(b) Marking Instructions

- Return to the Printed Assessment screen in ItemBank.



- Click on the 'Generate' button next to Mark Scheme.

You will then be presented with the Generate (Mark Scheme) window.



- In the 'Choose template' drop down menu select *Level* Paper Assessment Templates - Marking Instruction Booklet.

- Insert a comment in the Comments text box (eg, Version 1) 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.)

The following will appear in the Mark Scheme section.

MarkScheme

Generate

Revision	Date Created	Created By	Type	Template
1	06/01/2015 12:59:45	PAssessor	Generated	Marking Instruction Booklet

Download
Upload
Revision History

Download

- To view the marking instructions, click 'Download'.
- 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 marking instruction followed by Mark Scheme and then the version number, eg, 2012 Fashion and Textile Technology Int 2\_Mark Scheme\_1.docx
- You can then open this file in Word.

**Note:** Files are automatically downloaded to C:\Users\USERNAME\Downloads where USERNAME is your computer username. **You must delete** the 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 24 if you require any amendments.
- If no amendments are required proceed to the [Completing the Assessment](#) section on page 30.

## 6. Amending the Assessment

### (a) Reselecting or Rearranging Items

Once you have viewed the complete assessment, you can reselect or rearrange any items if necessary (instructions for viewing the assessment can be found in the [Viewing the Assessment](#) section (page 19)).

- Close Microsoft Word and return to the Printed Assessment screen in ItemBank.

Printed Assessments (Version : TEST NQ Assessment Training Demo)

Printed Assessments: **Create**

Name: NQ Assessment Training Demo **Download with resources** **Edit** **Delete**

Code: NQATD

**Assessment Paper** **Generate**

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

**Download** **Upload** **Revision History**

**MarkScheme** **Generate**

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

**Download** **Upload** **Revision History**

**Preliminary Material / Insert** **Generate**

**Close**

- Click 'Close' to close the Printed Assessment screen.

You will then return to the Assessment Version Management tab.



**Assessment Management**

**Assessment Version Management**

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 7	NQAT7	Draft	24/07/2014 00:00:00	24/07/2024 00:00:00	00:00:00	23:59:59	Checked-out by: Pat
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-out by: Pat
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

**Filter Assessment Versions**

☒ Delivered on-screen  
☒ Delivered on paper

**Subject:**  
All

**Assessment:**  
All

☒ Draft  
☒ Quality Review  
☒ Live  
☒ Retired

**Assessment Date Range:**  
From: 04/04/2013  
to: 23/07/2024

**Assessment Version Name:**

**Assessment Version Reference:**

**Key:** ☒ Valid ☒ Invalid ☒ Delivered on-screen ☒ Delivered on paper

**Buttons:** Check-in, Undo Check-out, Check-out, Printed Assessment, Package Assessment Version, Create Assessment Version, **Edit Assessment Version**, View Assessment Version

**Edit Assessment Version**

- To edit an Assessment Version first select it from the list (it will then be highlighted in blue).
- Click 'Edit Assessment Version'.

You will then return to the Edit Assessment Version screen.

**Edit Assessment Version**

**Assessment Version Rules**

**Assessment Rules**

- TEST 2014 QM Training Structured
  - Introduction
    - Intro page 1
  - Section 1 (ID: 1)
    - Item ID: 981P1183
    - Item ID: 981P1180
  - Section 2 (ID: 2)
    - Item ID: 981P1182
    - Item ID: 981P1181
    - Item ID: 981P1178
  - Tools
  - Finish

**Assessment Summary**

Total Number Of Items: 5  
Pass Mark: 0  
Total Assessment Time: 60  
Average Facility Value: 0  
Total Number of Easy Items: 0  
Total Number of Medium Items: 0  
Total Number of Hard Items: 0

**Key:** ☒ Question ☒ Front Cover ☒ Back Cover ☒ Rubric ☒ Source ☒ Not defined

**Buttons:** Add, Edit, Delete, Validate

**Text:** This Assessment is unlocked **Locked**

**Buttons:** OK, Cancel

**Add**

- To reselect or rearrange items, select the section (it will then be highlighted in pink) and then click 'Add'.

You will then return to the Fixed Section screen.

The screenshot shows the 'Section 2 (Fixed)' window. At the top is a 'Search Items' bar. Below it is a table titled 'Selected Items' with columns: Order, Item ID, Name, Usage C..., Facility Va..., Item Type, Marked ..., ItemSpe..., Keywords, MarkBre..., Section, Topic, Total Mark, Workflow Status, and Yearite.... The table contains 5 rows of data. Below the table, there are buttons for 'Up', 'Down', 'Preview Item', and 'Remove Item'. At the bottom right are 'OK' and 'Cancel' buttons. Arrows point from labels below the screenshot to these elements: 'Item Rows' points to the table, 'Up' points to the 'Up' button, 'Down' points to the 'Down' button, 'Preview Item' points to the 'Preview Item' button, and 'Remove Item' points to the 'Remove Item' button.

Order	Item ID	Name	Usage C...	Facility Va...	Item Type	Marked ...	ItemSpe...	Keywords	MarkBre...	Section	Topic	Total Mark	Workflow Status	Yearite...
1	951P1024	Section B Heading	0	0.5	Not defined							1	Released	
2	978P1005	Item 1.2.G	0	0.5	Not defined		1	Cotton, Sw	KU/DC	A	Fabric	12	Released	2009
3	978P1023	Item 1.2 AB	0	0.5	Not defined							1	Released	
4	951P1028	End Section B	0	0.5	Not defined							1	Released	
5	951P1030	End	0	0.5	Not defined							1	Released	

Selected Items: 5    Average Usage: 0

Item Statistics	Easy	Medium	Hard	Average FV
Assessment	0	0	0	0.00
Section	0	0	0	0.00

OK    Cancel

Item Rows    Up    Down    Preview Item    Remove Item

- If you wish to view one of the items before rearranging or reselecting, select the 'Item Row' and click 'Preview Item'.
- The item will now download.
- Close the blank browser tab that has appeared.
- An icon will appear in the Surpass Viewer window to indicate when the item has downloaded.



- Click the arrow icon to open the file in Microsoft Word. Close Word when you have finished looking at the item.

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

- To change the order of the items in the question paper select the 'Item Row' and use the 'Up' and 'Down' arrow buttons.
- To delete one of the items that you previously selected, select the 'Item Row' and click 'Remove Item'.

Search Items

Order	Item ID	Name	Usage C...	Facility Va...	Item Type	Marked ...	ItemSpe...	Keywords	MarkBre...	Section	Topic	Total Mark	Workflow Status	Yearite...
1	951P1024	Section B Heading	0	0.5	Not defined							1	Released	
2	978P1005	Item 1.2 JG	0	0.5	Not defined		1	Cotton, Sw	KU/DC	A	Fabric	12	Released	2009
3	978P1023	Item 1.2 AB	0	0.5	Not defined							1	Released	
4	951P1028	End Section B	0	0.5	Not defined							1	Released	
5	951P1030	End	0	0.5	Not defined							1	Released	

Selected Items: 5    Average Usage: 0

Item Statistics	Easy	Medium	Hard	Average FV
Assessment	0	0	0	0.00
Section	0	0	0	0.00

- To return to carry out a search for a replacement item click 'Search Items'.

Instructions for searching for items can be found in the [Carrying out a simple search in ItemBank](#) section (page 12).

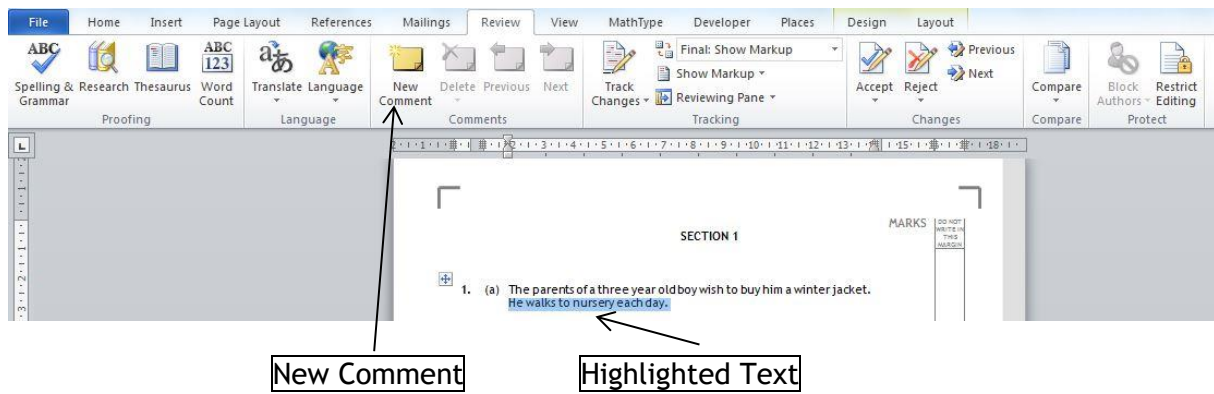
Once you have reselected and/or rearranged your items, instructions for viewing a revised question paper and marking instructions can be found in the [Viewing the Assessment](#) section (page 19).

#### (b) Amending Content

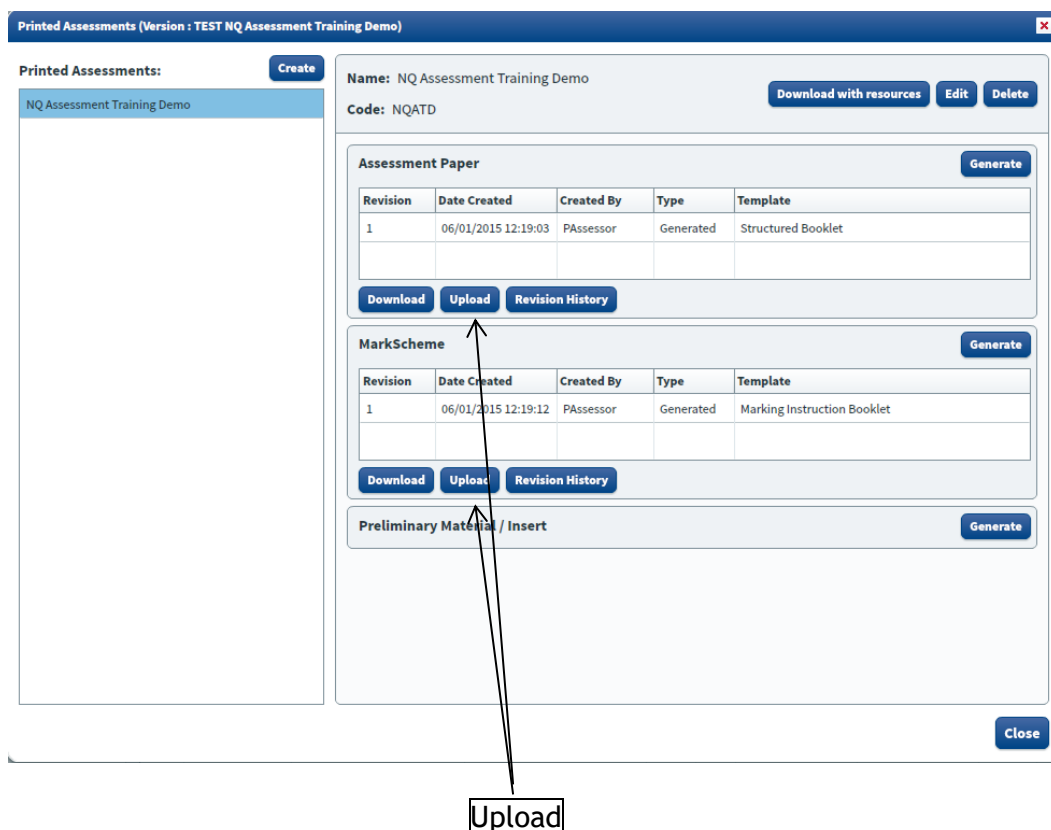
Once you have viewed the complete assessment, you may notice that minor amendments to the content or layout are required. Instructions for viewing the assessment can be found in the [Viewing the Assessment](#) section (page 19).

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.

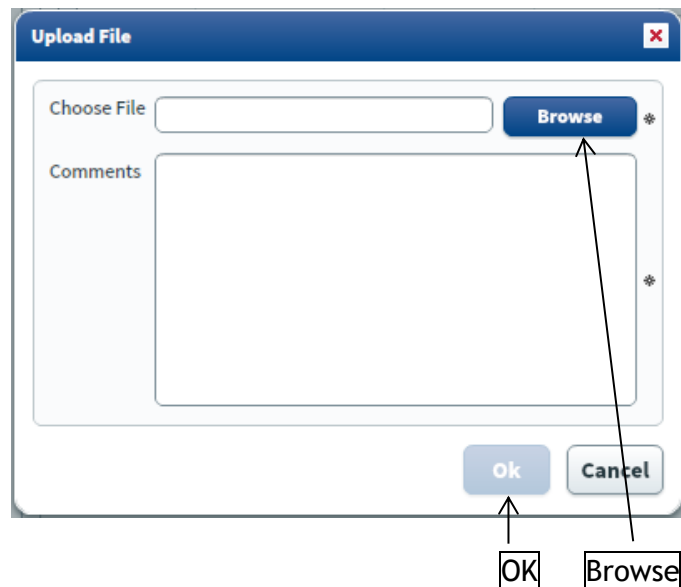
**Note:** Please ensure you are happy with the items selected and the order in which they appear before any minor amendments are added.



- 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.

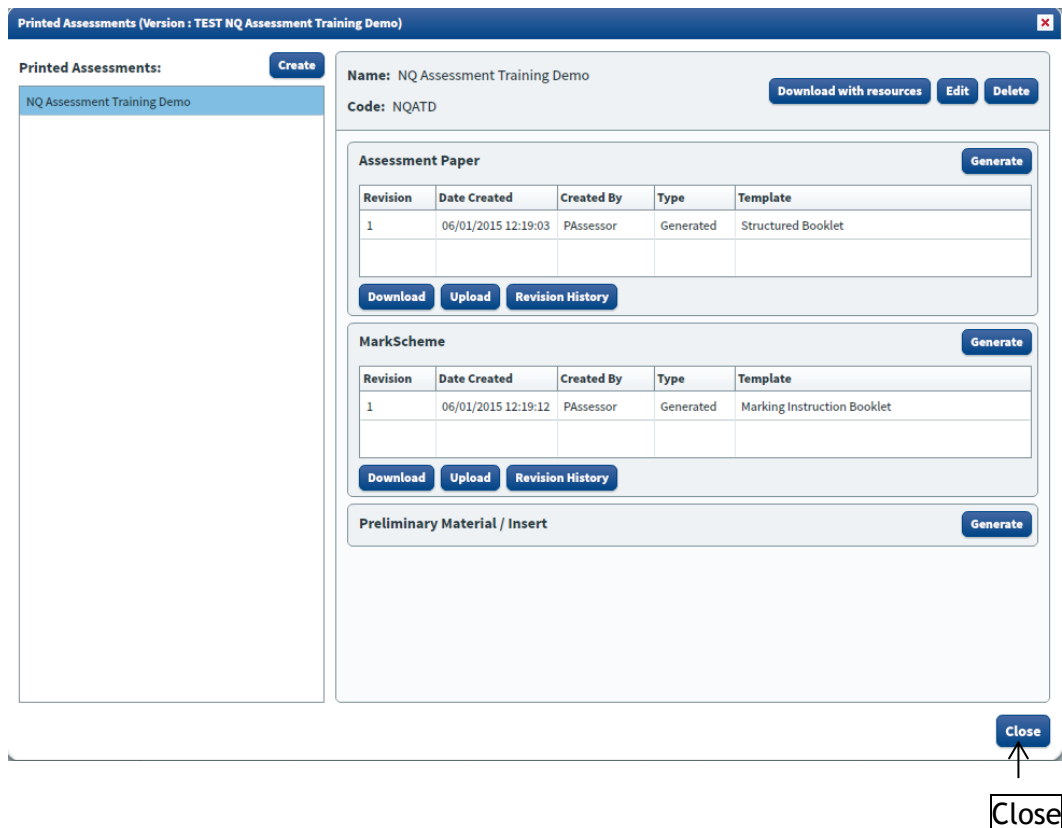


- Click 'Upload' in either the Assessment Paper or Mark Scheme section.



- 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.



- Click 'Close' to close the Printed Assessments screen.

## 7. Completing the Assessment

When you are happy that the question paper and marking instructions are ready for the Assessment Review meeting, make sure you are in the Assessment Version Management tab.

The screenshot displays the SQA ItemBank Assessment Version Management interface. On the left, there are filters for 'Filter Assessment Versions' including 'Delivered on-screen', 'Delivered on paper', 'Subject' (All), 'Assessment' (All), and checkboxes for 'Draft', 'Quality Review', 'Live', 'Retired', 'Checked-In', and 'Checked-Out'. Below these are 'Assessment Date Range' (From 24/05/2013 to 25/05/2023) and 'Assessment Version Name' and 'Assessment Version Reference' fields. The main table lists assessment versions with columns: Subject, Assessment Name, Assessment Version Name, Assessment..., Sta..., Start Date, End Date, Start T..., End Ti..., and Checked-in/ou. The row for 'TEST PA Training' is highlighted in blue. At the bottom, there is a 'Key' section with icons for Valid, Invalid, Delivered on-screen, and Delivered on paper. Below the key are buttons: 'Check-In', 'Undo', 'Check-Out', 'Printed Assessment', 'Package Assessment Version', 'Create Assessment Version', 'Edit Assessment Version', and 'View Assessment Version'. A callout box labeled 'Check-In' points to the 'Check-In' button.

Subject	Assessment Name	Assessment Version Name	Assessm...	Sta...	Start Date	End Date	Start T...	End Ti...	Checked-in/ou
TEST PA Training	TEST Admin Support Training	TEST 2014 Admin Support Training	T2014AST	Draft	24/05/2013 00:00:00	25/05/2023 00:00:00	00:00:00	23:59:59	Checked-In by
TEST PA Training	TEST Admin Support Training	TEST 2014 Admin Support Training	T2014AST	Draft	24/05/2013 00:00:00	25/05/2023 00:00:00	00:00:00	23:59:59	Checked-Out b
TEST PA Training	TEST Admin Support Training	TEST 2014 Admin Support Training	T2014AST	Draft	24/05/2013 00:00:00	25/05/2023 00:00:00	00:00:00	23:59:59	Checked-Out b
TEST PA Training	TEST Admin Support Training	TEST 2014 Admin Support Training	T2014AST	Draft	24/05/2013 00:00:00	25/05/2023 00:00:00	00:00:00	23:59:59	Checked-In by
TEST PA Training	TEST Admin Support Training	TEST 2014 Admin Support Training	T2014AST	Draft	24/05/2013 00:00:00	25/05/2023 00:00:00	00:00:00	23:59:59	Checked-Out b
TEST PA Training	TEST PA Training Assessment	TEST 2014 PA Training Assessment	X9990101	Draft	24/05/2013 00:00:00	25/05/2023 00:00:00	00:00:00	23:59:59	Checked-Out b

- Select the question paper 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 - Search Parameters

There are 7 types of search parameters that are appropriate for Principal Assessors to use for paper-based assessments within ItemBank.

Parameter	When to use it?	Example
Fixed Ref	When you want to search for a specific value in a specific metadata field.	You want to search the metadata field 'Total Mark' for values equal to 10.
Free Text	When you want to search for specific text in a specific metadata field	You want to search the metadata field 'Keywords' to find out if any items have the keyword 'bar chart'.
Free Text - Year Coding	When you want to filter out items used in a particular year or years.	You are choosing your items for the 2016 assessment and do not want to choose any items used in 2015 or 2014.
Specific Item	When you are looking for a specific item.	You want to choose a specific item.
Item Name	When you want to search for items that contain any specific text in the name of the item.	You want to search for items written by a specific writer (the writer's initials will form part of the item title so you can use their initials to search).
Folder Reference	When you want to search for items stored in a specific folder in ContentProducer.	You want to search for items written by a specific writer (as all items written by a writer will be stored in their own folder).
Workflow Status	When you want to see all available items in the bank.	You want to choose from all available items in the bank.

(a) Fixed Ref

The screenshot shows the 'Create Parameter' dialog box with four steps. Annotations with arrows point to specific elements:

- Select Type:** Points to the 'Fixed Ref' dropdown in Step 1.
- Select Projects:** Points to the list of projects in Step 2, where 'Int 2 Fashion and Textile Technology' is selected.
- Select Reference:** Points to the list of references in Step 3, where 'ItemSpecNo' is selected.
- Select Value:** Points to the value '1' in the dropdown in Step 4.
- Available Items:** Points to the text 'Available Items: 14' at the bottom.
- Create:** Points to the 'Create' button at the bottom.
- Done:** Points to the 'Done' button at the bottom.

In this example:

- Select Type = 'Fixed Ref'.
- Select Projects = 'Int 2 Fashion and Textile Technology'.
- Select Reference = 'ItemSpecNo'.
- Select Value = '1'.

'Available Items' will display the number of items that match the criteria specified, in this case, 14.

- Click 'Create'.
- Click 'Done'.



(b) Free Text

The screenshot shows the 'Create Parameter' dialog box with four steps. Annotations with arrows point to specific elements:

- Select Type:** Points to the 'Free Text' dropdown in Step 1.
- Select Projects:** Points to the 'Int 2 Fashion and Textile Technology' checkbox in Step 2.
- Select Reference:** Points to the 'Keywords' selection in Step 3.
- Select Value:** Points to the 'Cotton' text input in Step 4.

At the bottom right, there are three buttons: 'Available Items' (with a count of 1), 'Create', and 'Done'. Arrows point from these buttons to labels below them: 'Available Items' points to 'Available Items', 'Create' points to 'Create', and 'Done' points to 'Done'.

In this example:

- Select Type = 'Free Text'.
- Select Projects = 'Int 2 Fashion and Textile Technology'.
- Select Reference = 'Keywords'.
- Select Value = 'Cotton'.

*As this is a free text search you should uncheck the 'Case sensitive' checkbox and choose Contains from the drop-down menu. If you need to filter items that don't contain a particular value, you can check the 'NOT' checkbox.*

'Available Items' will display the number of items that match the criteria specified, in this case, 1.

- Click 'Create'.
- Click 'Done'.

### (c) Free Text - Year Coding

When selecting items to include in an assessment you may wish to filter out items used in several preceding years. The following illustrates the parameters to use to do this.

The screenshot shows the 'Create Parameter' dialog box with four steps:

- Step 1: Select Type**: A dropdown menu showing 'Free Text'.
- Step 2: Select Projects**: A list of projects with checkboxes. 'NS Paper Assessment Templates' is unchecked, and 'PA Training Project' is checked.
- Step 3: Select Reference**: A list of references with checkboxes. 'Coding' is selected.
- Step 4: Select Value**: A text input field containing 'aaaa', a 'Case sensitive' checkbox, a 'Contains' dropdown menu, and a 'NOT' checkbox.

At the bottom right, the text 'Available Items: 3' is displayed next to the 'Create' button. The 'Done' button is also visible.

Select Type = 'Free Text'.

Select Projects = 'PA Training Project'.

Select Reference = 'Coding'.

Select Value = 'aaaa', drop down menu 'Contains', 'NOT' checkbox checked.

'Available Items' will display the number of items that match the criteria specified, in this case, 3.

- Click 'Create'.

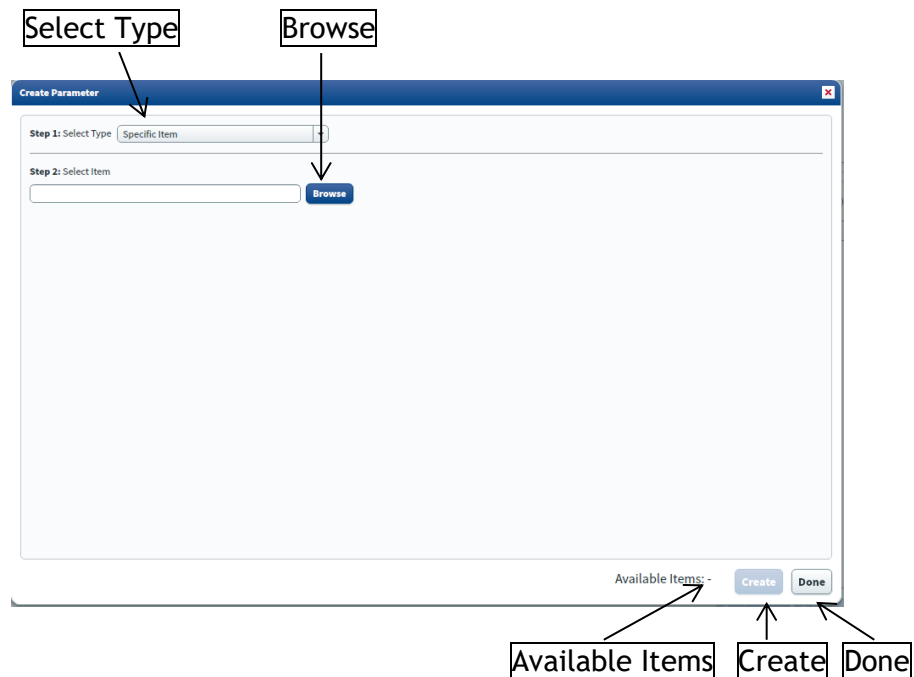
If required, further parameters can be created to allow filtering out of multiple years.

- Amend Select Value.
- Click 'Create'.
- Click 'Done'.

Once you have selected all your parameters, ensure you choose 'Match all parameters' on the Search Results screen.

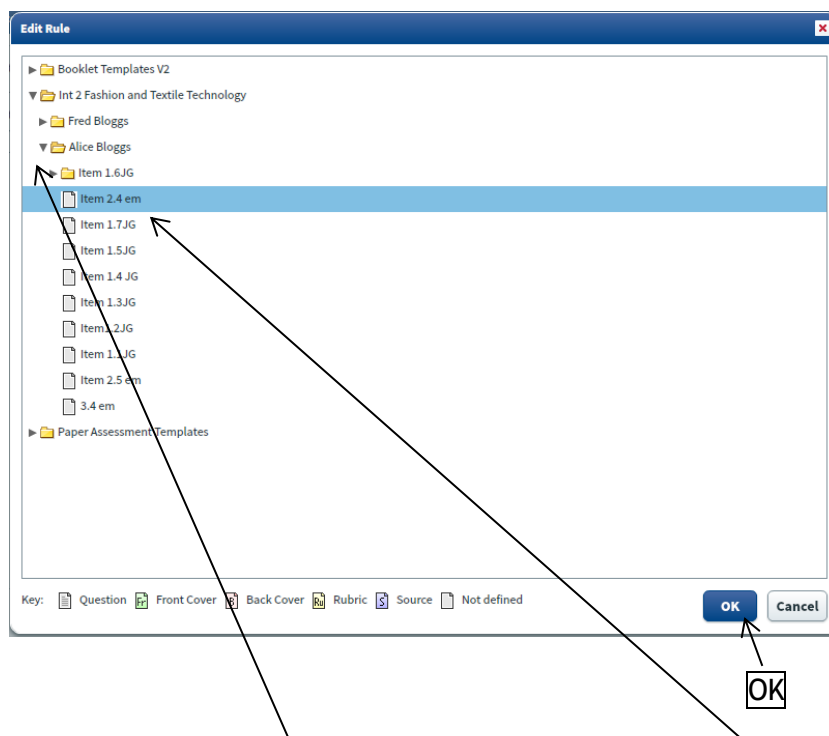
Details of the year coding used for each subject will be provided to Principal Assessors by NQ Assessment.

(d) Specific Item



In this example:

- Select Type = 'Specific Item'.
- Click 'Browse'.



- To expand a folder, click on the arrow to the left-hand side. Click on the item you wish to select and then click 'OK'.

'Available Items' will display the number of items that match the criteria specified; this will always be 1.

- Click 'Create'.
- Click 'Done'.

(e) Item Name

The screenshot shows the 'Create Parameter' dialog box with three steps. Step 1: 'Select Type' has a dropdown menu with 'Item Name' selected. Step 2: 'Select Projects' has a list of three items: 'Higher Paper Assessment Templates' (unchecked), 'Int 2 Fashion and Textile Technology' (checked), and 'NS Paper Assessment Templates' (unchecked). Step 3: 'Select Value' has a text input field with 'JG', a 'Case sensitive' checkbox (unchecked), a dropdown menu with 'Contains' selected, and a 'NOT' checkbox (unchecked). At the bottom right, there is a label 'Available Items: 9' and two buttons: 'Create' and 'Done'. Annotations with arrows point to these elements: 'Select Type' points to the dropdown in Step 1; 'Select Projects' points to the list in Step 2; 'Select Value' points to the text input in Step 3; 'Available Items' points to the 'Available Items: 9' label; 'Create' points to the 'Create' button; and 'Done' points to the 'Done' button.

In this example:

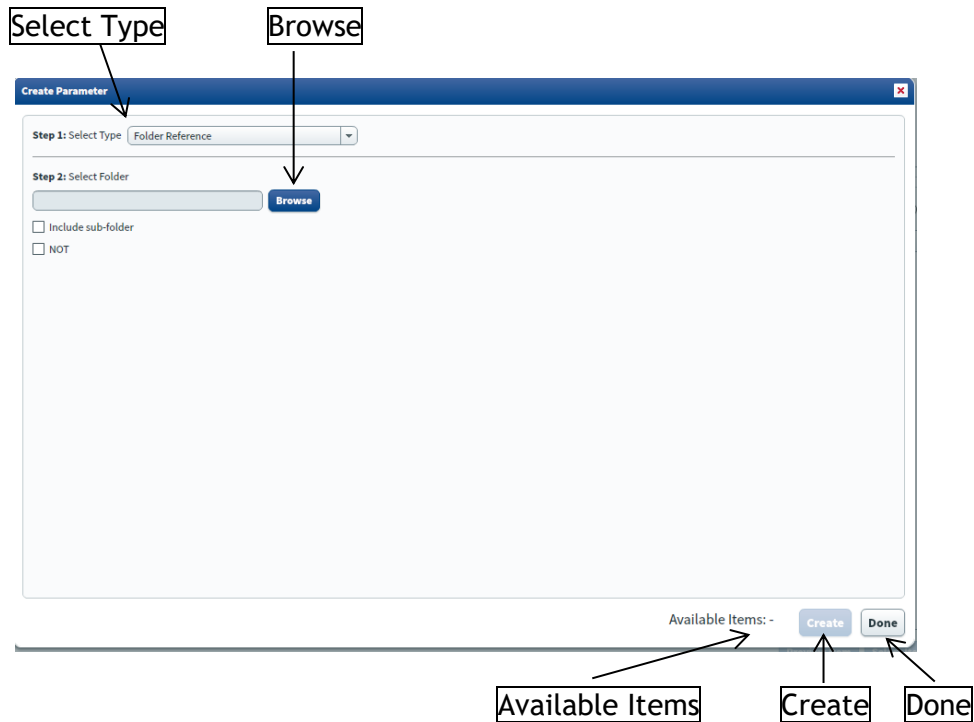
- Select Type = 'Item Name'.
- Select Projects = 'Int 2 Fashion and Textile Technology'.
- Select Value = 'JG'.

*As this is a free text search you should uncheck the 'Case sensitive' checkbox and choose Contains from the drop-down menu. If you need to filter items that don't contain a particular value, you can check the 'NOT' checkbox.*

'Available Items' will display the number of items that match the criteria specified, in this case, 9.

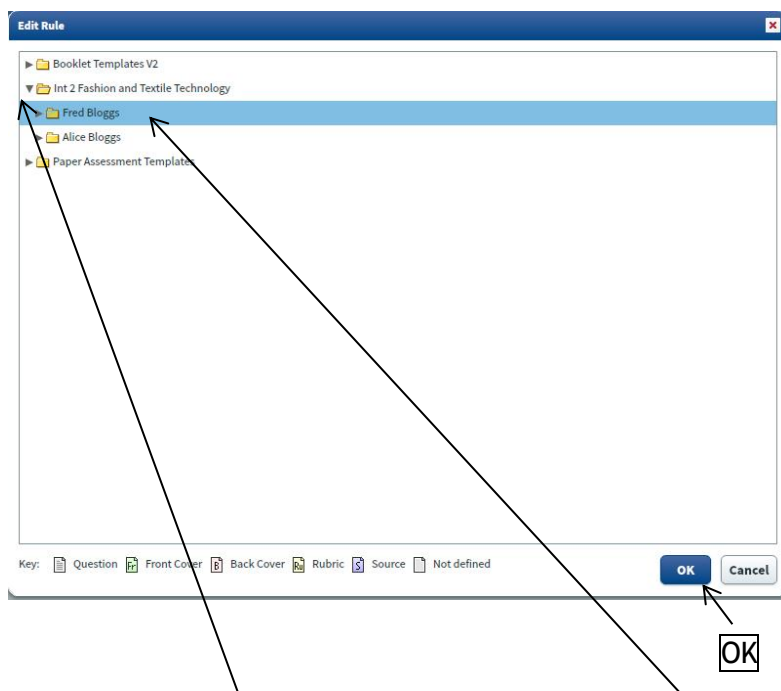
- Click 'Create'.
- Click 'Done'.

(f) Folder Reference



In this example:

- Select Type = 'Folder Reference'.
- Click 'Browse'.



- To expand a folder, click on the arrow to the left-hand side. Click on the folder you wish to select and then click 'OK'.

'Available Items' will display the number of items that match the criteria specified, in this case, 6.

- Click 'Create'.
- Click 'Done'.

(g) Workflow Status

The screenshot shows a 'Create Parameter' dialog box with three steps. Step 1, 'Select Type', has a dropdown menu with 'Workflow Status' selected. Step 2, 'Select Project', has three radio button options: 'Higher Paper Assessment Templates', 'Int 2 Fashion and Textile Technology' (which is selected), and 'N5 Paper Assessment Templates'. Step 3, 'Select Value', has a dropdown menu with 'Released' selected. At the bottom right, there is a label 'Available Items: 31' and two buttons, 'Create' and 'Done'. Annotations with arrows point from labels to specific elements: 'Select Type' points to the Step 1 dropdown, 'Select Project' points to the Step 2 radio buttons, 'Select Value' points to the Step 3 dropdown, 'Available Items' points to the 'Available Items: 31' label, 'Create' points to the 'Create' button, and 'Done' points to the 'Done' button.

In this example:

- Select Type = 'Workflow Status'.
- Select Project = 'Fashion and Textile Technology'
- Select Value = 'Released'

'Available Items' will display the number of items that match the criteria specified, in this case, 31.

- Click 'Create'.
- Click 'Done'.

## 9. 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:

