



# **PISA 2018 PORTAL USER'S GUIDE**

## **November 2015 Update**

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Produced by ETS, Core A Contractor

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## PART 1 – INTRODUCTION

The PISA 2018 Portal (<http://pisa.ets.org/portal>) is the central website for PISA 2018 and is maintained by the international contractors. It is one of the main channels for communication between the international contractors and participating National Centres. The PISA Portal is a secure website accessible using a login and password. Each National Project Manager (NPM) should have received a set of NPM logins to be shared with the National Team at his or her discretion based on agreed-upon confidentiality procedures established at the National Centre.

The PISA Portal is composed of five main areas called “tabs.” Each tab is a place designated for certain activities or to hold specific information or documents. The diagram below gives a global overview of the organisation of the PISA 2018 Portal:



An overview of the first version of this portal was presented in September 2015. A video of the demonstration can be found on the PISA 2018 Portal in the following folder: Documents > Meetings > 2015\_09\_WebinarPortal.

The purpose of this manual is to describe the new features developed since September. The guide is organised by sections of the portal and includes diagrams (some may have more information than in countries' current view) to aid usage and make the experience as easy as possible for all PISA participants.

If you have any questions or problems, please don't hesitate to contact: [PISA-Portal@ets.org](mailto:PISA-Portal@ets.org).

## PART 2 – WORKFLOW FILTERS

1. The PISA 2018 Portal “Tasks” tab takes users to the page where workflows are found.
2. The “Show Filters” tool (Exhibit 2A) on the top left corner of the page opens up the Workflow Filter Menu, providing the Workflow page view. The selected feature remains visible as long as the computer’s cache is not cleared, even if the user leaves the tasks section and returns later.

**PISA Portal** NPM\_ARE01  
Search Logout

PISA Portal 2018

HOME **TASKS** DOCUMENTS TRANSLATIONS LINKS

[+Show Filters](#) 2A

Showing 1 to 25 of 45 entries (filtered from 47 total entries) Show 25 entries

Country	Language	Workflow	Title	Workflow Step	Due Date	Responsible	Status
ARE	ara-ARE	Questionnaire CB	<a href="#">CB Questionnaires ara-ARE</a>	1.0 Negotiation	2015-Nov-15	PISA NPM	New
ARE	eng-ARE	Questionnaire CB	<a href="#">CB Questionnaires eng-ARE</a>	1.0 Negotiation	2015-Nov-15	PISA NPM	New
ARE	ara-ARE	Cognitive CBA Trend	<a href="#">CBATrend Reading R02 ara-ARE</a>	National Review	2015-Nov-15	PISA Reconciler or NPM	New

3. The “Show Filters” tools allow users to filter to what they want visible by Title of Workflow, Workflow Step (Exhibit 2B), Responsible User, Country (Exhibit 2C), Status of Workflow, Language (Exhibit 2D), and Workflow type (Exhibit 2E), as shown below.

**PISA Portal** NPM\_BEL01  
Search Logout

PISA Portal 2018

HOME **TASKS** DOCUMENTS TRANSLATIONS LINKS

**Filters (hide)** [Clear All Filters](#) [Save Default Filters](#) [Clear Saved Filters](#)

**2B**

Title:

**2C** Workflow Step: 1.0 Negotiation, Completed, Final Review, National Review

**2D** Country: BEL

**2D** Responsible: NPM\_BEL01, PISA NPM, PISA Reconciler or NPM, beatrice.halleux@skynet.be

**2D** Language: deu-BEL, fra-BEL, nld-BEL

**2E** Status: Complete, New, Overdue

**2E** Workflow: Coding Guide, Cognitive CBA New, Cognitive CBA Trend, Cognitive PBA Trend

4. By default, NPMs are allowed to view all tasks associated with their country/language.
5. Users also have the option to set a combination of filters.
6. The “Clear All Filters” tool (Exhibit 2F) clears the selection of any filter, excluding saved sets. The “Save Default Filters” tool (Exhibit 2G) allows users to save a combination of frequently used filters. The “Clear Saved Filters” tool (Exhibit 2H) allows users to clear all selected filters, **including** any saved filters. To clear one specific field but leave the rest, users may select the “x” icon (Exhibit 2J).

The screenshot displays the PISA Portal 2018 interface. At the top right, the user is identified as 'NPM\_MLT01' with links for 'Search' and 'Logout'. The main navigation bar includes 'HOME', 'TASKS' (highlighted), 'DOCUMENTS', 'TRANSLATIONS', and 'LINKS'. Below the navigation bar, a 'Filters (hide)' section contains three buttons: 'Clear All Filters' (labeled 2F), 'Save Default Filters' (labeled 2G), and 'Clear Saved Filters' (labeled 2H). The filter area is divided into several sections: 'Title' (empty), 'Country' (MLT), 'Language' (eng-MLT, mlF-MLT), 'Workflow' (Document, PB Questionnaire, PBA), 'Workflow Step' (1.0 Negotiation, Completed, Edit, Translation), 'Responsible' (NPM\_MLT01, PISA NPM, PISA Reconciler or NPM), and 'Status' (Complete, New, Ongoing). A callout labeled 2J points to a small 'x' icon in the top right corner of the 'Workflow' dropdown menu.

## PART 3 – TASKS INTERFACE

1. To view the Tasks interface, on the home page of the PISA 2018 Portal, click on the “Tasks” tab.
2. After selecting a workflow to complete, the specific workflow pages provide several unique features that can be utilised throughout the workflow process. They are “Add Comment” (Exhibit 3A), View Complete Schedule (Exhibit 3B), and View Comments & Task History (Exhibit 3C).

**Sampling Task 0 – USA**

**Step:** Returned

**Due Date:** October 22, 2015

**Description:**  
The Sampling Task 0 (ST0) is the first of the sampling tasks. It collects information about the languages of reading instruction for all PISA students in your country. Please think of ALL PISA students when completing this task, even those which may later be excluded. If your country did not participate in PISA 2015, your 2018 ST0 will start as a blank template. If your country participated in PISA 2015, your 2018 ST0 starts with the final version from 2015. We are using tracking to be able to see what changes you make. Therefore, NOBODY is to turn off Track Changes or unshare the workbook (either will wipe out the history or changes up to that point). The file for this is below.

In order to work on this task, you must take ownership of it by clicking the “Take Task” button. Click the link to download it and use the Upload Files button to upload a new version. When you are finished, click the “Finish Task” button.

**Comment:**  
--

[Add Comment](#)

**Task Files & Documents:**

[Download](#) [+ Upload files...](#)

Name	Size	Date Modified
CY7_1509_SMP_CWSampling_Task_0_USA_1.xlsx	55.50 KB	2015-Oct-23 14:17:02

**Task Actions:**

[Finish Task](#)

Callout boxes: 3A points to 'Add Comment', 3B points to 'View Complete Schedule', 3C points to 'View Comments & Task History'.

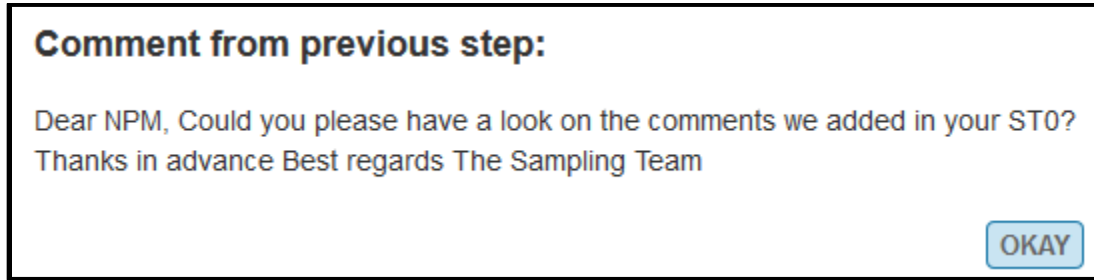
3. “Add Comment” allows users to post comments by typing in a pop-up box and clicking “Save” (see below: Exhibit 3D).

**Your Comment**

3D

[Cancel](#) [Save](#)

4. The feature allows users to ask questions, raise concerns, or note changes made during the course of a workflow. Other users will see the comments when they log in and take responsibility for the next step in the workflow (see below). The system also allows users to edit their comments before to finish a task.



5. The title of the user who left the previous comment will appear near the top of the page (Exhibit 3E).

**Sampling Task 0 – USA**

**Step:** Returned [View Complete Schedule](#)

**Due Date:** October 22, 2015 [View Comments & Task History](#)

**Description:**  
 The Sampling Task 0 (ST0) is the first of the sampling tasks. It collects information about the languages of reading instruction for all PISA students in your country. Please think of ALL PISA students when completing this task, even those which may later be excluded. If your country did not participate in PISA 2015, your 2018 ST0 will start as a blank template. If your country participated in PISA 2015, your 2018 ST0 starts with the final version from 2015. We are using tracking to be able to see what changes you make. Therefore, NOBODY is to turn off Track Changes or unshare the workbook (either will wipe out the history of changes up to that point). The file for this is below.

In order to work on this task, you must take ownership of it by clicking the "Take Task" button. Click the link to download it and use the Upload Files button to upload a new version. When you are finished, click the "Finish Task" button.

**Previous Comment:**  
 Fuss1@westat.com: Dear NPM, Could you please have a look on the comments we added in your ST0? Thanks in advance Best regards The Sampling Team

**Comment:**  
 --

[Add Comment](#)

**Task Files & Documents:**

[Download](#) [Upload files...](#)

<input type="checkbox"/>	Name	Size	Date Modified	
<input type="checkbox"/>	CY7_1509_SMP_CWSampling_Task_0_USA_1.xlsx	55.50 KB	2015-Oct-23 14:17:02	

**Task Actions:**

[Finish Task](#)

6. The "View Complete Schedule" tool (Exhibit 3B above) presents the complete path of the selected workflow. The schedule shows every workflow step and which user is responsible for the steps as shown below.

Step	Responsible	Due Date
Edit/Returned	PISA NPM	2015-Oct-22
Review	PISA Sampling	2015-Nov-30

[Close](#)

7. The “View Comments and Task History” Tool (Exhibit 3C above) shows:
- Users who have worked on the task so far
  - Each step completed
  - Actions taken
  - Any comments posted to the workflow
  - Date and time each step was completed
8. Below is the most comprehensive view of the workflow’s progress.

**Sampling Task 0 – USA**

**Step:** Returned  
**Due Date:** October 22, 2015  
**Description:**  
 The Sampling Task 0 (ST0) is a template for all PISA students when creating a new task. If your country page is not yet created, NOBODY is to be added to the task. In order to work on this task, you must be a member of the team. When you are finished, click the "Finish Task" button.

**Previous Comment:**  
 Fuss1@westat.com: Dear NPM, Could you please have a look on the comments we added in your ST0? Thanks in advance  
 Best regards The Sampling Team

**Comment:**  
 --

[Add Comment](#)

**Task Files & Documents:**

[Download](#) [Upload files...](#)

Name
CY7_1509_SM


**Task Actions:**

[Finish Task](#)

**Workflow Log**

User	Step	Action	Comment	Date
NPM_USA01	Returned	Taken		2015-11-16 18:24:50
Fusss1@westat.com	Review	Returned	Dear NPM, Could you please have a look on the comments we added in your ST0? Thanks in advance Best regards The Sampling Team	2015-11-16 18:22:19
Fusss1@westat.com	Review	Taken		2015-11-16 18:20:53
NPM_USA01	Returned	Approved		2015-11-16 18:20:17
NPM_USA01	Returned	Taken		2015-11-16 18:14:50
Fusss1@westat.com	Review	Returned		2015-11-16 17:12:58

[Close](#)

9. The symbol “” refers to a “File History” Tool (Exhibit 3F) that allows users to see file descriptions, past versions of specific items, and the date and time when a new version was uploaded during the course of the workflow.



**Sampling Task 0 – USA**

**Step:** Returned [View Complete Schedule](#)  
[View Comments & Task History](#)

**Due Date:** October 22, 2015

**Description:**  
The Sampling Task 0 (ST0) is the first of the sampling tasks. It collects information about the languages of reading instruction for all PISA students in your country. Please think of ALL PISA students when completing this task, even those which may later be excluded. If your country did not participate in PISA 2015, your 2018 ST0 will start as a blank template. If your country participated in PISA 2015, your 2018 ST0 starts with the final version from 2015. We are using tracking to be able to see what changes you make. Therefore, NOBODY is to turn off Track Changes or unshare the workbook (either will wipe out the history of changes up to that point). The file for this is below.



In order to work on this task, you must take ownership of it by clicking the "Take Task" button. Click the link to download it and use the Upload Files button to upload a new version. When you are finished, click the "Finish Task" button.

**Previous Comment:**  
Fuss1@westat.com: Dear NPM, Could you please have a look on the comments we added in your ST0? Thanks in advance Best regards The Sampling Team

**Comment:**  
--  
[Add Comment](#)

**Task Files & Documents:**

[Download](#) [+ Upload files...](#)

Name	Size	Date Modified	
 CY7_1509_SMP_CWSampling_Task_0_USA_1.xlsx	55.50 KB	2015-Oct-23 14:17:02	

**Task Actions:**

[Finish Task](#)

**3F** 3F → File name, description, history

10. The portal also includes quality control features for uploading files. The names of files to be uploaded to the workflow tasks must match the names of those already present. If users attempt to upload a file with a different name, the portal will refuse it and an error message will be displayed, as shown below.

**Error:**



You have some files that have not been uploaded. You are not able to finish this task until these are completed or canceled. To correct this, click on the "Start upload" or "Cancel" buttons.

[OKAY](#)

11. If the user correctly uploads a file, the green message below will be displayed

**Task Files & Documents:**

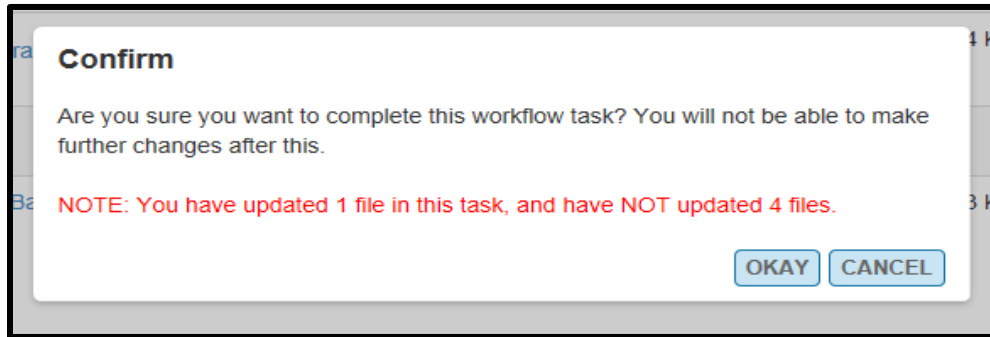
[Download](#) [+ Upload files...](#) Uploads complete. 1 file uploaded successfully.

Name	Size	Date Modified	
 CY7_1509_SMP_CWSampling_Task_0_USA_1.xlsx	55.50 KB	2015-Nov-16 18:40:22	

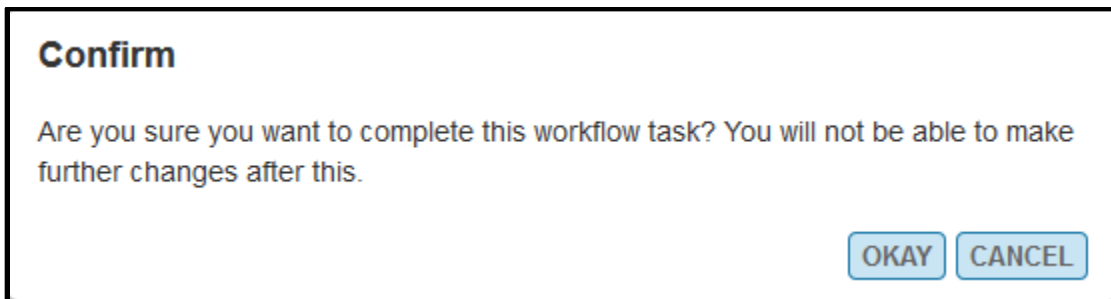
**Task Actions:**

[Finish Task](#)

12. If several files need to be updated and the user does not update each of them, when clicking on “Finish Task,” a pop-up notification will show how many files were updated and how many were not. This is a useful tool for double checking that all user files were uploaded successfully (see below).



13. If one or more files need to be updated and the user updates them all, when clicking on the “Finish Task” button, the user will get the message below:



## PART 4 – EMAIL NOTIFICATIONS

1. On the home page of the PISA 2018 Portal, click “Change Email Settings or Password” (this replaces the previous “Change Password or Email Address” part) in the bottom right-hand column. On the following page, enter your email address where requested (Exhibit 4A). Remember that you may enter only **one** email address. Then, check the box “All Workflow Types” (Exhibit 4B) or, if interested in only a subset of workflows, check the specific boxes (Exhibit 4C). This will send you a notification when the workflow step for which you have responsibility is ready for your attention.

2. Once you have selected the types of workflows for which you wish to receive notifications, click “Update Email Settings” (Exhibit 4D). This will save your selections and update your email address simultaneously.
3. Users will receive a reminder email similar to the message shown below when it is their turn to complete a step in a certain workflow. The notification will specify the name of the Workflow task, the name of the Workflow step, and its due date. This email will be sent by PISA-Portal <[donotreply@ets.org](mailto:donotreply@ets.org)> and might appear in your Spam folder, so please be aware you may have to check that folder.

The PISA workflow task titled Sampling Task 0 – USA is now available for you to work on. You can access this task by clicking the following link:

[Sampling Task 0 – USA](#)

The current workflow step for this task is Returned. The due date for this task is 2015-Oct-22.

Best regards,  
PISA Portal

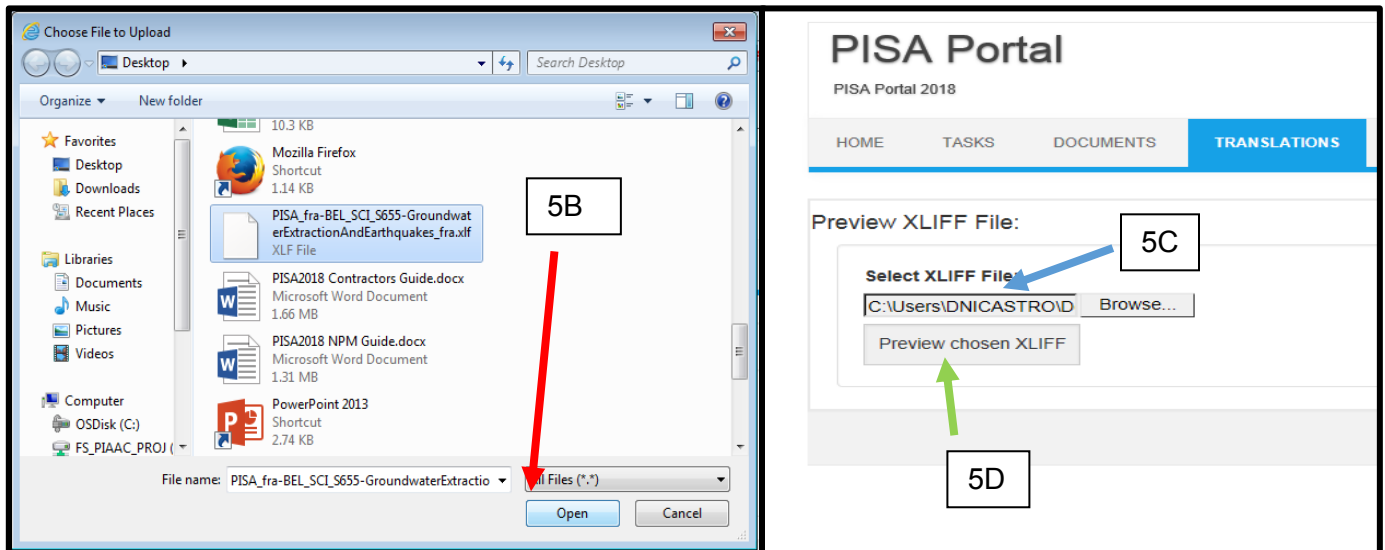
To opt out of future messages, please login to the PISA Portal and update your email preferences.

## PART 5 – TRANSLATIONS

1. The “Translations” tab on the PISA 2018 Portal home page brings users to the portion of the portal where previews of translation materials may be generated. Please note, however, this feature will not be used until March 2016.
2. This feature allows users to upload .xlf files to the Translation tool by clicking “Browse” (Exhibit 5A), and locating the .xlf files on their computer.



3. Upon locating the file you wish to preview, select it and click “Open” (Exhibit 5B). The file name should now be visible in the dialog box (Exhibit 5C).



4. Once the .xlf file has been selected, click “Preview Chosen XLIFF” (Exhibit 5D) to generate a preview of the translated item. More information about previewing items will be provided during the NPM Meeting in March 2016.