



PISA PORTAL USER'S GUIDE

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INTRODUCTION

This guide is meant to assist users of the PISA Portal – specifically National Project Managers and their teams – to navigate the new features of the portal system for the PISA 2021 Cycle. The guide highlights key features and content of the Portal, complete with diagrams, to make the use of the Portal as simplistic as possible for new users, and for returning PISA participants.

ACCESS AND CONFIDENTIALITY

The PISA Portal is a secure website accessible using a login and password. Each National Centre has a set of National Project Manager (NPM) logins and Reconciler accounts. The NPM is responsible for sharing these logins with the National Team at his or her discretion based on agreed-upon confidentiality procedures established at the National Centre. It is the responsibility of the NPM to ensure that only authorised staff members have access to the website and to change the password if necessary following a staffing change at the National Centre. The password associated with each login will need to be changed every 90 days.

The NPM is the main contact in the National Team regarding all issues with the PISA Portal. As such, in case of technical difficulties related to the PISA Portal, the NPM should contact PISA-Portal@ets.org.

PISA PORTAL: HOME

The PISA Portal Home page provides helpful links to assist NPMs in implementing their tasks.

On the left-hand side of the Home page, users will find the announcements section (A). This is where important dispatches from the PISA Contractors will be posted on a regular basis throughout the cycle. Please note that there are two separate sections for announcements on the Home Page, one for PISA 2021 and one for PISA 2018. An archive of all announcements for those cycles can be found via a link at the bottom of each section.

On the right-hand side of the Home Page, users may also find the Navigation Links Pane (B). This series of links provides users with helpful tools that they will use throughout the PISA cycle.

PISA Portal

HOME TASKS DOCUMENTS TRANSLATIONS LINKS

Welcome to PISA

Welcome to the PISA portal. Links to different functions can always be found across the top of the page. On the right side of this page are links to frequently used information. If you need help, please contact PISA-Portal@ets.org.

News and Announcements (PISA 2021)

[All 2021 announcements...](#)

News and Announcements (PISA 2018)

- [Newsletter \(September 2018\)](#) (9/19/2018) - The newsletter is on the PISA 2018 Portal here: Documents>General Information>Newsletters>2018.
- [Newsletter \(August 2018\)](#) (8/24/2018) - The newsletter is on the PISA 2018 Portal here: Documents>General Information>Newsletters>2018.
- [Coder Query Reports Updated](#) (7/27/2018) - Updates have been made to the PISA 2018 Coding Query Report for Global Competence and Science. The spreadsheet, which has a tab containing all queries within the document and others with the same information separated by domain, is available on the PISA Portal at Documents -> Materials -> 2018 Main Survey Resources -> Coding_AssessmentMaterials ->... [Read More](#)

Search Portal:

Navigation Links

- Contacts 2018
- National Summary Information
- Calendar
- Frequently Asked Questions (FAQ)
- Glossary
- Support
- More Links
- Change Email Settings or Password

The links include the following:

- The Contacts page provides users with a full list of PISA participants' and Contractors' contact information.
- The National Summary Information page lists detailed information about a National Centre's sampling, instruments, and Field Trial/ Main Survey dates.
- The Glossary page provides users with a list of the acronyms commonly used during the PISA cycle. It also includes a list of definitions for terms that users may encounter over the course of the PISA cycle.
- The Support page provides users with a list of Contractors' contact information related to specific aspects of PISA.
- The Change Email Settings or Password page is used for updating email settings. This includes establishing email notifications to receive alerts when workflow tasks are complete and changing a user's password.

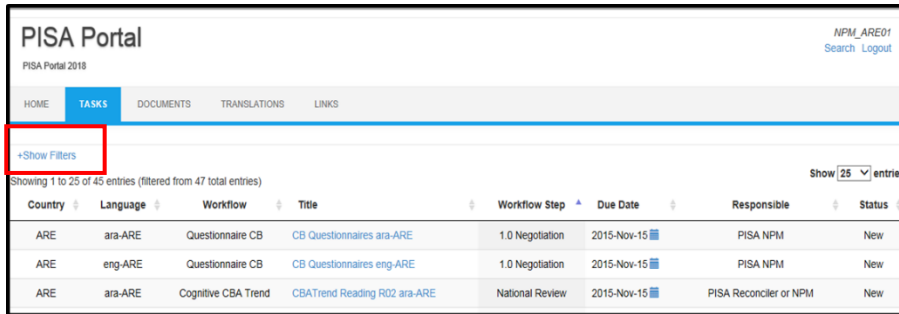
Please note that there will be two links for Contacts and National Summary Information: one for PISA 2018 and one for PISA 2021. Also note that all of the links in the Navigation Links pane may also be found under the Links tab at the top of the page as users navigate through the Portal.

PISA PORTAL: TASKS

From the Home page of the PISA Portal, click on the Tasks tab (for either PISA 2018 or PISA 2021) to view and complete tasks within various project workflows.

Workflow Filters

Clicking on “Show Filters” on the left-hand side of the Tasks page, will open the Workflow Filter Menu that allows users to limit what they see within the list of workflows.



PISA Portal
PISA Portal 2018

HOME **TASKS** DOCUMENTS TRANSLATIONS LINKS

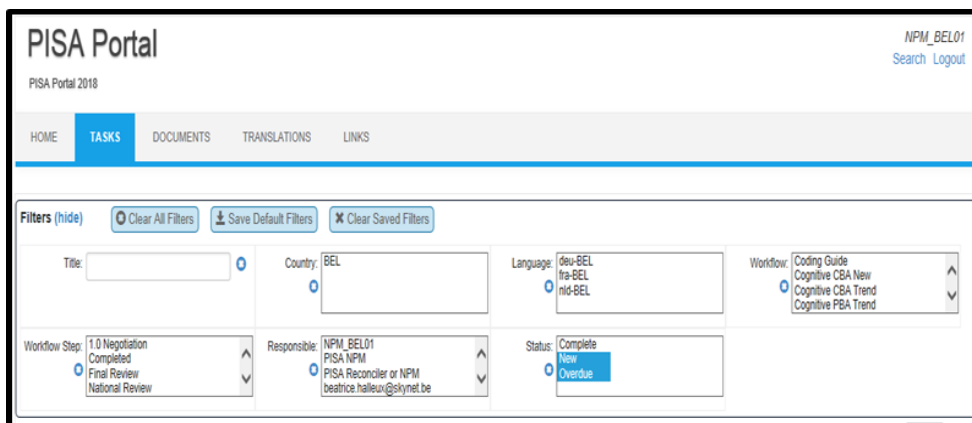
+Show Filters

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	CB Questionnaires ara-ARE	1.0 Negotiation	2015-Nov-15	PISA NPM	New
ARE	eng-ARE	Questionnaire CB	CB Questionnaires eng-ARE	1.0 Negotiation	2015-Nov-15	PISA NPM	New
ARE	ara-ARE	Cognitive CBA Trend	CBATrend Reading R02 ara-ARE	National Review	2015-Nov-15	PISA Reconciler or NPM	New

Users can filter workflows by using drop-down menus within the following categories: Title, Workflow Step, Country, Responsible User, Language, Status of Workflow, and Type of Workflow. By default, National Project Managers can view all of the Tasks associated with their country/language.

- The “Clear All Filters” (button will remove any filters that the user chooses.
- The “Save Default Filters” button will allow users to save a combination of filters that they select that will be always present thereafter.
- “Clear Saved Filters” will allow the user to clear all selected filters **including** any saved filters.
- Should a user choose to clear one specific field, but leave the rest, they may select the “x” icon to clear a certain group of filters.



PISA Portal
PISA Portal 2018

HOME **TASKS** DOCUMENTS TRANSLATIONS LINKS

Filters (hide)

Title:

Country: BEL

Language: deu-BEL, fra-BEL, nld-BEL

Workflow: Coding Guide, Cognitive CBA New, Cognitive CBA Trend, Cognitive PBA Trend

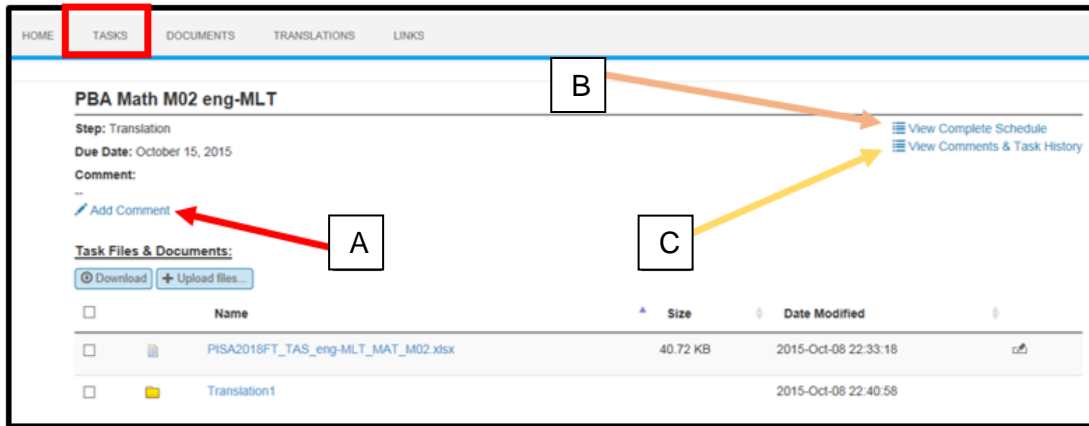
Workflow Step: 1.0 Negotiation, Completed, Final Review, National Review

Responsible: NPM_BEL01, PISA NPM, PISA Reconciler or NPM, beatrice.halleux@skynet.be

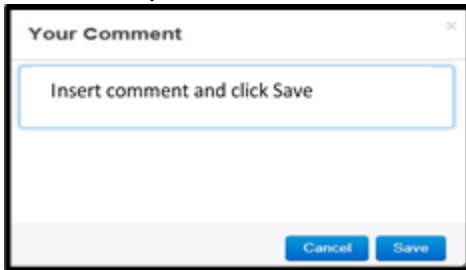
Status: Complete, New, Overdue

Workflow Steps and Features

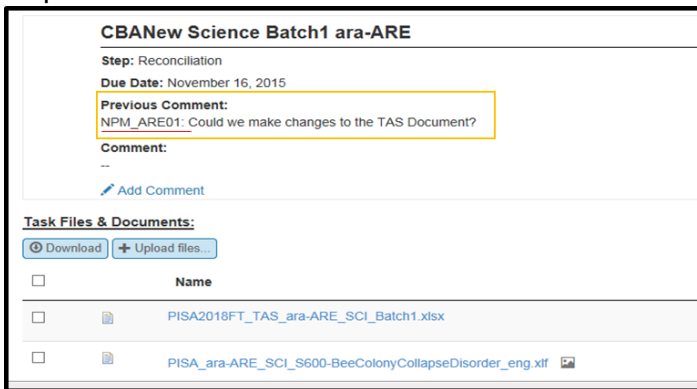
Select a workflow from the list of entries by clicking on the title. Once a specific workflow has been selected, several features are available throughout the workflow process. The general features are the ability to add comments (A), view the complete schedule (B), and view comments and a task history (C).



- A. Using the Add Comment tool, users may post comments or notes by clicking “Add Comment,” typing their comment in the pop-up box as shown below. These comments will be visible to all other users that are part of the workflow steps. Users may also edit their comments once they have been posted.



The username of individuals who have entered comments will be identified within the workflow step screen before the comment.



- B. Using the View Complete Schedule tool, users will be able to see the complete path of the selected workflow. The schedule shows every workflow step, and which user is responsible for each.

Step	Responsible	Due Date
Translation	PISA Reconciler or NPM	2015-Nov-15
Reconciliation	PISA Reconciler or NPM	2015-Nov-16
Verification Preparation	PISA Reviewer	2015-Nov-17
Verification	PISA Verifier	2015-Nov-18
Verification Review	PISA Reviewer	2015-Nov-19
Referee Review	PISA Referee	2015-Nov-20
Post Verification Review	PISA Reconciler or NPM	2015-Nov-21
TD Review	PISA Cognitive	2015-Nov-22
Layout Adaptation	PISA SDS	2015-Nov-23
TD Signoff	PISA Cognitive	2015-Nov-24
Final Check Preparation	PISA Reviewer	2015-Nov-25
Final Check	PISA Verifier	2015-Nov-26

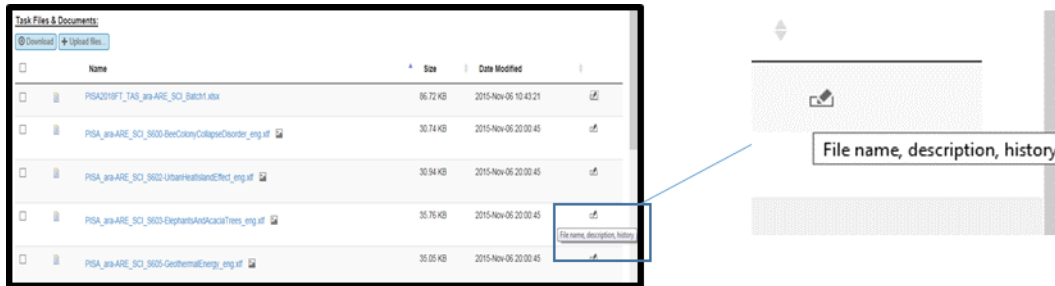
- C. The View Comments and Task History tool (Exhibit C) is the most comprehensive view of the workflow’s progress. By selecting this option, users can see:
- The ID of the user(s) who have worked on the task so far.
 - Each step that has been completed.
 - The actions taken.
 - Any comments that have been posted to the workflow.
 - The date and time that each step was completed.

User	Step	Action	Comment	Date
beatrice.halleux@skynet.be	Review Change Requests	Taken		2015-10-13 14:35:10
NPM_MLT01	Reconciliation	Approved		2015-10-13 14:34:57
NPM_MLT01	Reconciliation	Taken		2015-10-13 14:29:39
NPM_MLT01	Translation	Approved	Is it possible to make changes to the TAS Document?	2015-10-13 14:29:28
NPM_MLT01	Translation	Taken		2015-10-12 16:44:03

Showing 1 to 5 of 5 entries

First Previous 1 Next Last

Clicking on the File name icon allows the user to view details about the file: file descriptions, past versions of specific items, and the date and time when a new version was uploaded along the course of the workflow.

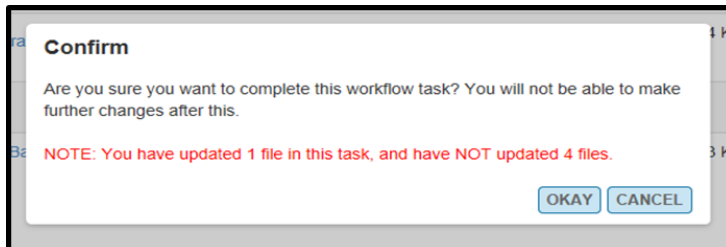


Uploading Files to a Workflow

The file name of any file being uploaded to a workflow must match the file name of one that is already present. If users attempt to upload a file that is named differently than any of those already in the workflow task at their step, that file will be refused by the portal.

When files are uploaded correctly, a confirmation message will appear ensuring that users wish to complete the task. However, if a file has not uploaded successfully, users will receive a message stating that there was an error, and the failed upload must be cleared before users may proceed.

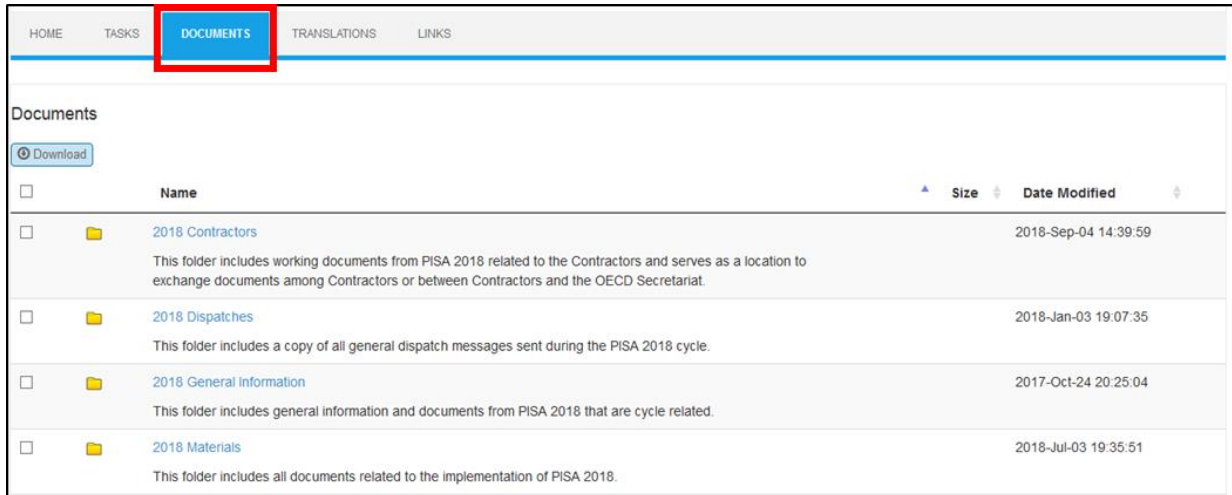
When a file is uploaded, and a user proceeds to finish a task, a pop-up notification will appear stating how many files have been updated and also how many have not. This is a useful tool for double checking that all of the user's files had been uploaded successfully.



Please note: If all files in a workflow step are changed and uploaded by a user, the message above will not appear.

PISA PORTAL: DOCUMENTS

From the Home page of the portal, click on the “Documents” tab. This will bring users to the Documents section of the portal, where important information and PISA-related materials are saved. Please note: there will be folders for both the PISA 2018 and PISA 2021 cycles on this page.

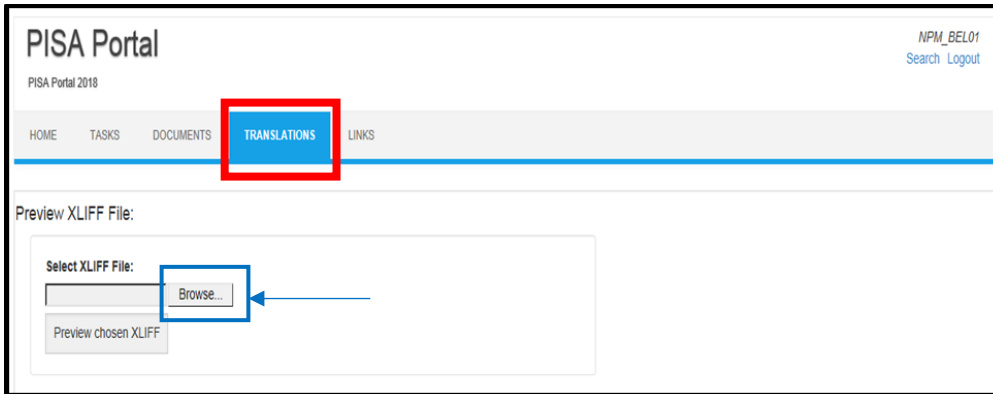


- The types of files that can be found on the Documents page of the Portal include:
 - Dispatches sent to participants during the PISA cycles,
 - General Information documents (frameworks, newsletters, NPM Manual, Technical Standards),
 - Materials (PISA cognitive and questionnaire instruments and process documents), and
 - Meetings documents (NPM and training meeting agendas and presentations, webinar presentations and recordings)

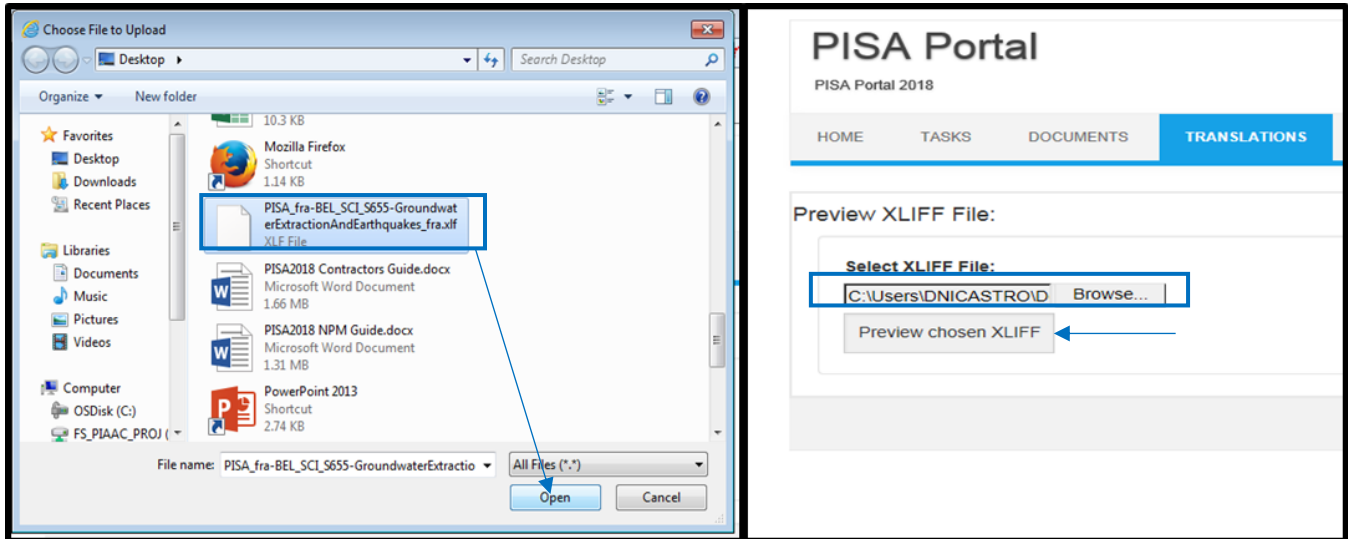
PISA PORTAL: TRANSLATIONS

From the Home Page of the PISA Portal, click on the “Translations” tab. This will bring users to the Translation portion of the portal, where previews of translation materials may be generated.

Using .xlf files that users may save from their designated workflow tasks, users may upload these files into the Translation tool by clicking “Browse”, and locating the .xlf files on their computer.



Locate and select the file to be previewed and click “Open”. The file name should now be visible in the dialog box. Once the .xlf file has been selected, click “Preview Chosen XLIFF” (Exhibit D) to generate a preview of the translation item.



PISA PORTAL: EMAIL NOTIFICATIONS

From the Home Page of the PISA Portal, click “Change Email Settings or Password” in the right-hand Navigation Links pane to set up receipt of notifications regarding workflow tasks. On the following page, enter your desired email address in the specified area (Exhibit A). Remember that you may only enter **one** email address. Then, check the box “All Workflow Types” (Exhibit B₁). You will receive a notification any time that a workflow step you are involved with is ready for you to take action.

Profile

Update Your Email Settings:

EMAIL

Receive email notifications when tasks are completed for the following workflow types:

All workflow types

Cognitive CBA New Workflow Document Workflow (Sampling Tasks, Translation Plan, PVS)

Cognitive CBA Trend Workflow Questionnaire CB Workflow

Cognitive PBA New Workflow Questionnaire PB Workflow

Cognitive PBA Trend Workflow Coding Guideline Workflow

School Materials Workflow

If you wish to filter the type of workflows that you receive notifications for, you may specify by selecting each à la carte (exhibit B₂). Once you have selected the types of workflows you wish to receive notifications for, click “Update Email Settings” (Exhibit C). This will save your selections and update your email address simultaneously. When it is your turn to complete a step in a certain workflow, users will receive an email similar to the image below:

The PISA workflow task titled CBATrend Math M03 fra-BEL is now available for you to work on. You can access this task by clicking the following link:

[CBATrend Math M03 fra-BEL](#)

The current workflow step for this task is Verification Preparation. The due date for this task is 2015-Oct-17.

Best regards,
PISA Portal

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

The email will specify the name of the Workflow Task, The name of the Workflow Step, and the Due Date for completion.

PORTAL SUPPORT

Users with questions or issues regarding the PISA Portal should contact the portal administrator: PISA-Portal@ets.org. Examples of questions or issues include:

- Access to the PISA Portal or to specific parts of the PISA Portal (e.g., the Documents, Tasks/Workflow, or Translation tools areas, etc.)
- Issues related to a new or existing user account
- Questions related to the functionalities of the PISA Portal