# TABLE OF CONTENTS

<table>
<thead>
<tr>
<th>Part</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Part 1 – Introduction</td>
<td>3</td>
</tr>
<tr>
<td>Part 2 – Workflow Filters</td>
<td>4</td>
</tr>
<tr>
<td>Part 3 – Tasks Interface</td>
<td>6</td>
</tr>
<tr>
<td>Part 4 – Email Notifications</td>
<td>11</td>
</tr>
<tr>
<td>Part 5 – Translations</td>
<td>12</td>
</tr>
</tbody>
</table>
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.
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.

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.
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).
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).

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

![Comment from previous step:]

Dear NPM, Could you please have a look on the comments we added in your ST0? Thanks in advance Best regards The Sampling Team

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

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.
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.

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.
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.

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