IMS Administrator's Guide

The Rhode Island Instructional Management System

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IMS Administrator's Guide

Introduction

The IMS is a standards-based curriculum and assessment management tool for K–12 teachers and administrators. It provides a central platform to create, store, customize, deploy, and evaluate the effectiveness of curriculum and assessments district wide. The end result is a user-friendly resource that enables teachers to save time, efficiently measure progress against standards, and identify and repeat best practices.

The benefits of the IMS include:

- Reduced time required for teachers to create instructional material
- Centralized management and dissemination of curriculum and assessments
- Ability to evaluate curriculum and teaching effectiveness over time
- Improved efficiency of day-to-day instruction, by eliminating significant manual work typically borne by teachers
- Deployment of a standards-aligned district-wide curriculum that has been scoped, created, and sequenced through centralized management and collaboration
- Ability for any teacher to access shared lessons, assessments, and learning resources through a central library
- Differentiation in instruction with evidence-based analysis of student performance, to optimize teaching for the individual, group or class
- Ability to incorporate curriculum content, including assessments, from any source through the comprehensive import and integration capabilities of the content-neutral platform

The IMS includes two robust assessment engines – The IMS local assessment tool and the Rhode Island Interim Assessment engine. In the IMS local assessment tool, district administrators can create and distribute common assessments by subject and grade level, across the district or to specific schools. Assessments are quickly available for teachers. Teachers can also create assessments and attach them to lessons. All content can be aligned to state or district standards. This enables educators to analyze assessment results in terms of students' proficiency in meeting those standards. Teachers can then adjust instruction accordingly.

The IMS local assessment tool allows educators and/or districts to create assessments and attach them to lessons or units. It also allows third party assessment banks to be loaded. For assessments that have been created/loaded into the IMS, various reports will be available.

The IMS also contains access to the Rhode Island Interim Assessments and Interim Assessment Item Banks. The Rhode Island Interim Assessment Engine will provide two new assessment opportunities – fixed form assessments and a test construction tool for grades 3-11. How to use the Rhode Island Interim Assessment functionality will be covered in different documents once that project is completed.

- ♦ **Fixed Form Assessments**: These assessments are meant to provide rich information for groups of students. They will assess student progress on understanding the Common Core State Standards material in mathematics and ELA on three occasions throughout the year. These will likely be administered in November, February, and April, starting in the 2012-13 school year. Users must use all three assessments in order to gather adequate information on student progress to inform decisions.

- **Test Construction Tool:** This tool will allow educators to create various local tests, quizzes, or exercises using items written to the Common Core State Standards in mathematics and ELA, as well as the new standards in Science and Social Studies. For example, an educator could create unit tests using a test blueprint with certain pre-determined specifications, or the educator could create short quizzes or exercises that do not necessarily require certain test properties. Within the test construction tool the user will be able to select the domain, cluster, or standards to assess and the tool would populate the test form with items through a guided process. Users will be able to save assessments for later use. This will be available in early 2013 for mathematics and ELA and in late 2013 for Science and Social Studies.

For both the Interim Assessment System and the IMS local assessment tool, districts have the option to schedule and assign local assessments to schools and/or educators. Various types of reports, including standards-based reports, will be available for viewing data from locally-developed, state (NECAP, RIAA, ACCESS for ELLs, etc.), and Interim assessments in the IMS.

This guide is for users of the IMS who have been assigned administrative privileges at the district or school level. This guide refers to these individuals as IMS system administrators, and it provides information about the tasks that system administrators can perform.

In this chapter you will learn about:

- Organizational Concepts
- Curriculum Setup Overview
- IMS administrator Tasks

Organization Concepts

As an IMS administrator, you will be assigned to one organization. RIDE will set up the IMS and will set up the school district and the schools in the district. Each district and school is an organization. For each organization, RIDE will assign one or more individuals to the role of OrgAdmin. To set up and define other IMS administrators in the same organization, the OrgAdmin creates an IMS administrator profile for each of them.

As an IMS administrator, you have access only to the organization to which you belong. District OrgAdmins perform district tasks, but not school tasks; school OrgAdmins can perform school tasks, but not district tasks.

In the IMS, teachers can see most of the district and school level information. However, they don't have permission to make changes. Everything that teachers create in the IMS is created at the classroom level. It belongs solely to them and is not accessible by administrators at a higher-level organization.

Curriculum Setup Overview

RIDE performs architectural and configuration setup tasks for the IMS. IMS administrators at the district and school levels perform content setup tasks.

> Your district's central administration should be following the Rhode Island Department of Education's *IMS Deployment Guide* to make decisions related to the IMS configuration as well as district support processes. As a system administrator in your district, you will be involved in much of this work.

The table below outlines the IMS setup tasks and who is responsible for completing them.

Task	Responsible Party
Set up school district profiles	RIDE
Set up school profiles	RIDE
Create courses	RIDE (imports from Teacher-Course-Student data from Student Information System)
Set up teacher profiles	RIDE (imports from Student Information System)
Set up student profiles	RIDE (imports from Student Information System)
Define roles in the IMS	IMS system administrator
Create curriculum	IMS system administrator
Create item banks	IMS system administrator
Create school and district level calendars	IMS system administrator

IMS Administrator Tasks

After the IMS setup is completed, there are several additional tasks that system administrators perform. You perform some of these tasks only once, but you do others on a more regular basis.

The tasks that IMS administrators do are the subject of this guide and are listed below.

- Edit some district and school profile information
- Create staff profiles
- Reset teacher and staff passwords
- Create top-level curriculum
- Link courses to the curriculum
- Create and import item banks
- Create and maintain district- and school-level calendars

Getting Started

Home Page

The IMS home page offers an overview of daily tasks. It can be used to provide valuable links to resources and announcements for the school or district. Administrators and teachers see the same information pane, though the options displayed may vary. As an IMS administrator, you can customize the home page by role and by school. You can add or delete sections, and you can use predefined templates that include the sections you use most.

Navigate Your Home Page

The home page includes four areas:

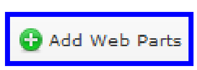
- **Header**: Includes your account name, a link to your account information, a sign-out link, and a link to online Help.
- **Top Navigation Bar**: Offers options to select the type of task.
- **Toolbar**: Offers tools to customize the home page display.
- **Information Pane**: Displays focus page selected.
- **Advanced Search**: Available on every page; provides the ability to search on all instructional entities.

Customizing Your Home Page

You can apply a template to the home pages for all users in your organization. Templates identify required information and make those items available to specific roles. When you apply a template, you can restrict users' ability to make changes. If modifications are permitted, users can change the column layout for their information pane display, and they can add and delete informational items that display on their page. For information and instructions on creating and managing home page templates, see Custom Pages and Menus.

You can also customize your own home page by adding and removing web parts, and changing the layout of the page.

Add Web Parts

1. On the toolbar of your home page, click 

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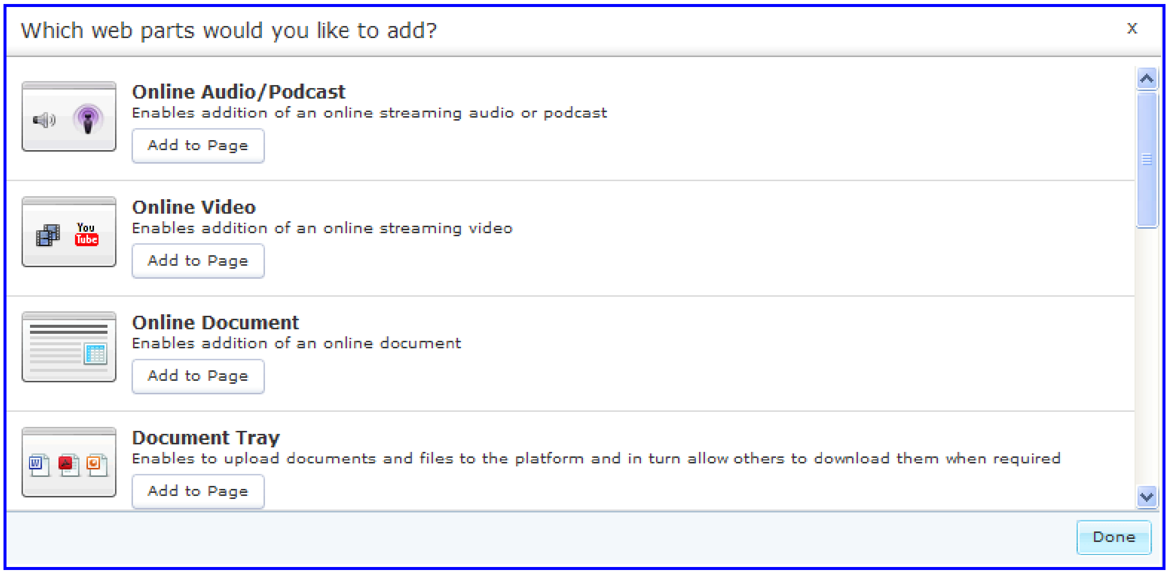


Options for adding web parts to your home page

2. Scroll to select a web part and click **Add to Page**. The **Edit web part settings** dialog box may open.

> **Note:** Details of web parts vary. They may include a title, description, URL, or embedded code. Several parts are standard and do not include any details. To add a video, audio, or podcast, paste the entire HTML or XML presentation code in the **Embed Code** text box. Many players, such as podbean or YouTube, provide you with the embedding code.

3. Click **Done**.

> **Note:** You can add more than one instance of the same web part. For example, you can add two video web parts and post a different video in each.

Remove Web Parts

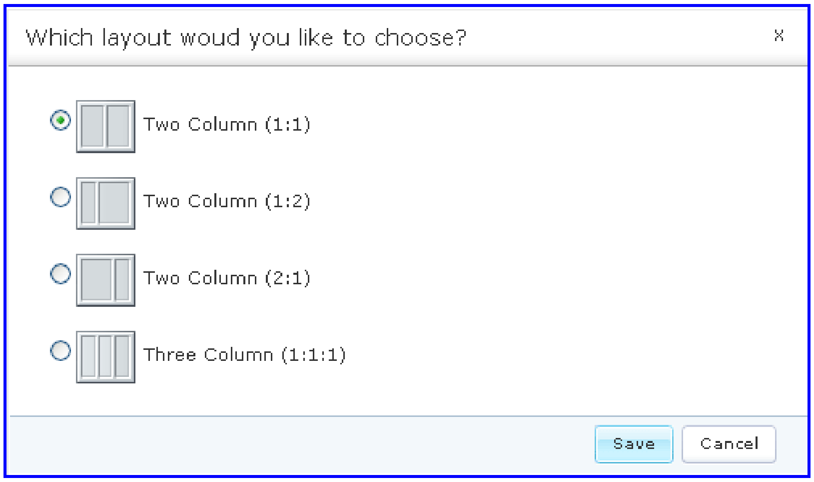
Some web parts are standard to the home page. Parts that can be removed display a drop-down arrow in the upper right corner of the web part.

1. Select a web part and click the drop-down arrow.
2. Click **Remove this web part**. A warning tells you that removal means your links cannot be recalled. If you want to replace it, you must recreate it.
3. Click **Yes** to close the warning and remove the web part.

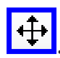
Change the Layout

You can customize the layout of your home page by adding or removing columns, and by moving web parts from one column to another.

1. On the home page toolbar, click **Layout**.
2. Select the number of columns and ratio from the pre-defined options.



Column Layout dialog box

3. Click **Save**.
4. To move sections from one column to another, move your cursor in the section title bar until your cursor changes to a cross .

Move a web part

5. Click and drag the web part to a new column.
6. Release the mouse.

Navigate the IMS

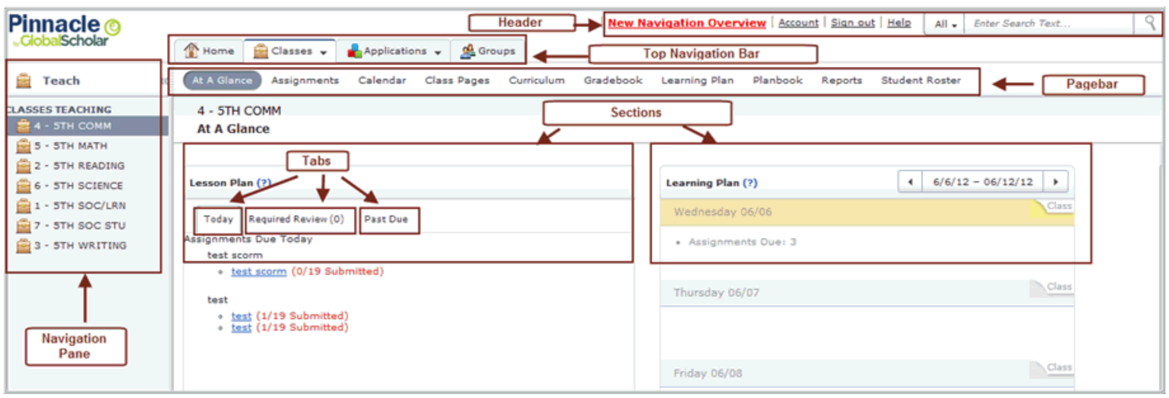
The IMS is a web-based application and runs in a browser such as Windows® Internet Explorer® or Mozilla Firefox®. Navigation can include the use of some browser tools, but as a rule this is discouraged.

IMS Navigation Tools

There are six tools available for navigation within The IMS.

- **Header**: Includes your account name, a link to your account information, a sign-out link, and a link to online Help.
- **Top Navigation Bar**: Located in the banner, this navigation is always available for all roles (administrators and teachers). It offers three or more options.

- **Navigation Pane**: When you select an option from the top navigation bar, a navigation pane often appears on the left side of the page. This pane acts as a submenu. Depending on your top navigation selection, it displays information such as the classes you teach or the levels of your organization. When you select an option in the navigation pane, the appropriate view is displayed in the information pane.
- **Pagebar**: When you click something in the top navigation bar or the navigation pane, the pagebar is displayed just below the top navigation bar. The options shown are relevant to specific tasks.
- **Sections**: In some pages, information is organized into sections. Sections provide shortcuts to various tasks within a single page.
- **Tabs**: In some pages and sections, tabs allow you to navigate to a specific task.



IMS Navigation

Browser Navigation Control Buttons

You can use browser controls to navigate within The IMS, but be aware that some of the browser controls can cause you to leave the IMS application.

- **Browser Back/Forward**: You can use the browser **Back** and **Forward** buttons, but you must be careful not to click **Back** all the way to the Sign-in page; this can force you to re-enter your IMS sign-in information.
- **Browser Home**: Because your browser **Home** button is probably not set to open the IMS home page, using this button may take you to a different website.
- **Find**: You can use the browser *Find* function to locate text on an IMS page.

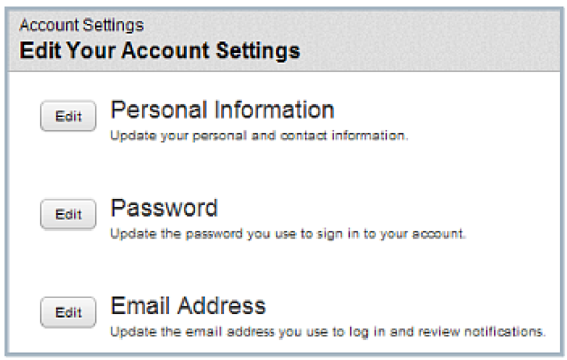
Edit Profile

You can edit your name and contact information from the **Account** link found in the IMS header.

***NOTE:* Most personnel information in the IMS is populated by the district SIS via the RIDE data mart. This information is updated nightly. If information that is supplied by the district SIS is also entered manually into the IMS, the manually entered information will be overwritten during the nightly refresh. Check with your district data manager to determine which elements of profile information are supplied by your district SIS. Those elements must be corrected in the district SIS and NOT in the IMS.**

Edit Contact Information

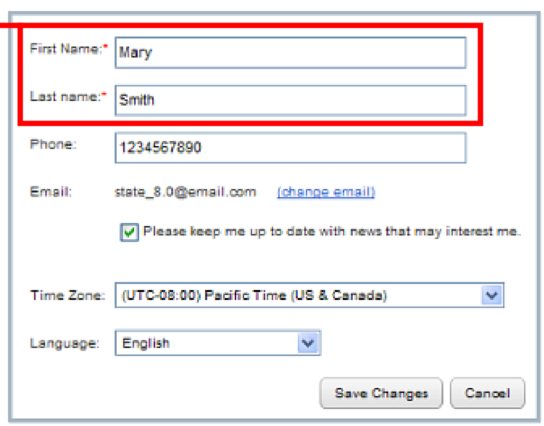
1. From the IMS header, click **Account**.



Edit Account Settings window

2. Next to **Personal Information**, click **Edit**, or from the toolbar, select **Personal Information**.

This information is populated by the district SIS. Do not change it from within the IMS



Edit Personal Information

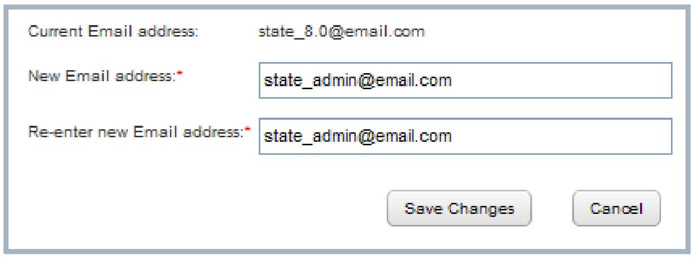
3. Type or select information in each field, as appropriate.
4. Click **Save Changes**.

5. On the toolbar, click **Exit Account Settings**, or click **All Settings** to return to the Account Settings page.

Note: The **Change Email** link opens the Email Address page, also available from your Account Settings page. The email address you enter is displayed for inter-school communications.

Edit Your Email Address

1. From the IMS header, click **Account**.
2. Next to **Email Address**, click **Edit**, or from the toolbar, select **Change Email**.



Edit Email Address

3. Type a **New email address**. To confirm your email address, you must type it again in the second field.
4. Click **Save Changes**.
5. Click **Exit Account Settings** from the toolbar or click **All Settings** to return to the Account Settings page.

Note: You can access this page by clicking the **change email** link, available on the Personal Information page of your **Account Settings**.

Change Password

You log into the IMS through the RIDE Portal with credentials supplied by your district. If you forgot your password or wish to change it, you must do so within the RIDE portal. Contact your district data manager or other designee if you need assistance.

Use Filters

You can use filters to refine your search for various objects such as students, staff, item bank questions, or curriculum objects.

General Filter Instruction

Most often, filters are indicated in the toolbar by an icon showing a series of down arrows 

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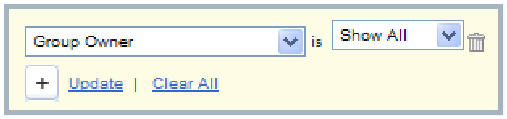
1. Click **Filter** to open filter options. Two or more drop-down lists appear.



Filter lists

2. Select your search criteria from the drop-down lists.

   Optional: Click to add other filter criteria.

3. Click **Update** to run a search with the filters you selected.

Note: You can click to remove criteria, or **Clear All** to reset all criteria and then run the search again.

Search

The IMS contains a search tool, which is available on every page that contains the top navigation bar. The functionality is consistent for all pages. You can enter free-form search text and perform the search on all instructional entities, including the following:

- **Units**: Searches on title, components, and attributes.
- **Lessons**: Searches on title, components, and attributes.
- **Assessments**: Searches on title, components, and attributes.
- **Activities**: Searches on title, components, and attributes.
- **SCORM**: Searches on title, components, and attributes.
- **Items**: Searches on question text, answer text, and attributes.
- **Standards**: Searches on title and description.

Note: For more information on attributes refer to Attributes.

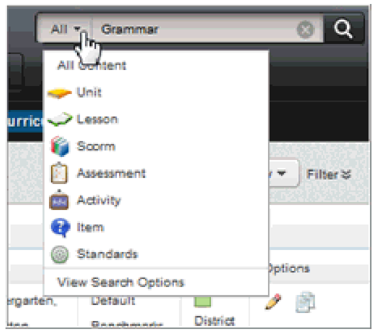
Search results are presented by categories, with tabs appearing on the Results page for each of the entities listed above. The set of results includes only those objects that the user has rights to access.

The Search tool provides both a basic search and advanced search functionality.

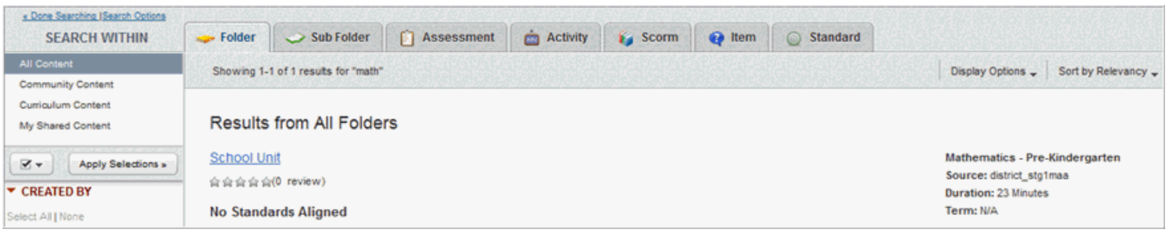
Basic Search

To perform a basic search:

1. In the **Search** text box, located above the top navigation bar, type a word or phrase for which to search.
2. Optionally, click the drop-down arrow, and select an instructional entity in which to search. The default selection is **All Content**.



3. To the right of the **Search** text box, click the **Search** icon. The Search Results page opens, with a tab for each of the instructional entities. Results appear in the appropriate entity tab.



Search Results tabs

You can refine your results in the following ways:

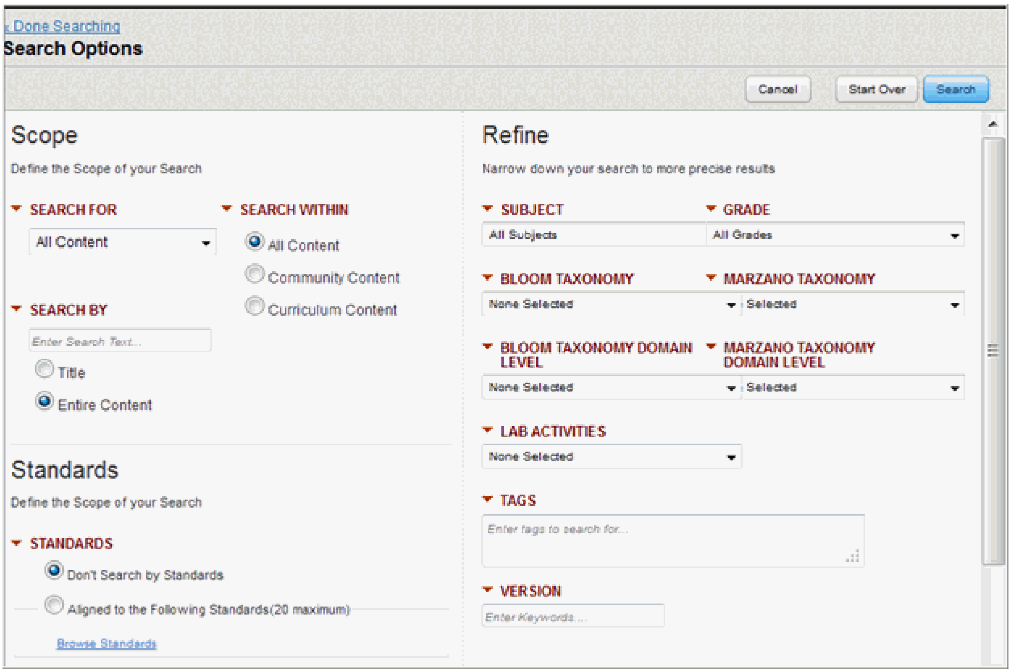
- In the **Search Within** section, select **All Content**, **Community Content**, or **Curriculum Content**.
- In the **Created By** section, select individuals to view only content created by them.
- In the **Subjects** and **Grades** sections, select one or more subjects and grades to view content for those subjects/grades only.
- In the **Best Practice** section, un-check the box to limit your search to best practice content only.

Advanced Search

To perform an advanced search:

1. In the **Search** box drop-down list, select **View Search Options**. The Search Options page opens.

> **Note:** You can also access the advanced search page by clicking **Applications** in the top navigation bar, and selecting **Community Content**.



2. Define the scope of your search:
   - In the **Search For** drop-down list, select an entity type, or select **All Content**.
   - In the **Search By** section, type the word or phrase for which to search. Then select whether to search for the text in the **Title** only, or in the **Entire Content**.

Note: You can leave the **Search By** field blank and search for all content that meets the other criteria that you have selected.

   - In the **Search Within** section, select **All Content**, **Community Content**, or **Curriculum Content**.
3. Optionally, narrow your search by identifying specific standards by which to search. Only entities that are aligned to the standards you select will be included in search results.
   - Select **Aligned to the Following Standards**.
   - Select **Include correlated standards in your search** if desired.
   - Click **Browse Standards**. The **Which Standards do you want to filter by?** pop-up window opens.
   - Select filtering criteria from the drop-down lists, and then expand a standard entity and select individual standards. You can select a maximum of 20 standards.
   - Click **Add Standards**.
4. Further refine your search by selecting values from one or more of the drop-down lists.
5. Click **Search**.

Note: At any time you can clear all search filters and begin a new search, by clicking **Start Over**.

The search results will include all entities containing the search text you entered, subject to the filters you apply. If the search text contains more than one word, results include all entities containing at least one of those words. Note that certain common words such as “a,” “an,” and “the” will be ignored.

Note: Within each filter, if multiple values are selected (for example, Math and English), search results must meet either criteria. When multiple filters are defined, search results must meet the criteria of all of the filters. So, if you select Math and English for the **Subject** filter, and you select 3rd and 4th grade for the **Grade** filter, all results must be either Math or English *and* either 3rd or 4th grade.

On the Search Results page, you can do the following:

- Click any of the tabs at the top of the page, to view results for each type of instructional entity.
- Click the **Display Options** drop-down list, and change the selections for the information that you want to appear.
- Click the **Sort By** drop-down list and select a different order in which to display results.

Performing Actions on Search Results

When you do a basic search, you can navigate to the Details page of an entity in the search results. When you do an advanced search, additional actions are available, depending on the entity type. On the Search Results page, in addition to navigating to the Details page of an entity, you can do the following:

- For units, lessons, activities, and assessments, you can edit, delete, or unpublish.
- For items, you can edit or delete.
- For standards, you can preview.

Note: For SCORM objects, you can only navigate to the Details page.

Use Date Picker

A Date Picker is a tool used to select a specific date. It is represented with a **Calendar** icon . When you click the icon, a calendar displays in a new window. By default, the current day is selected. To select a different day within the current month, click any other date. You can change the month by using the directional arrows to move forward or back a month. When you click a date, the IMS enters the selected date in the date field and closes the calendar window.

Select a Date from the Date Picker

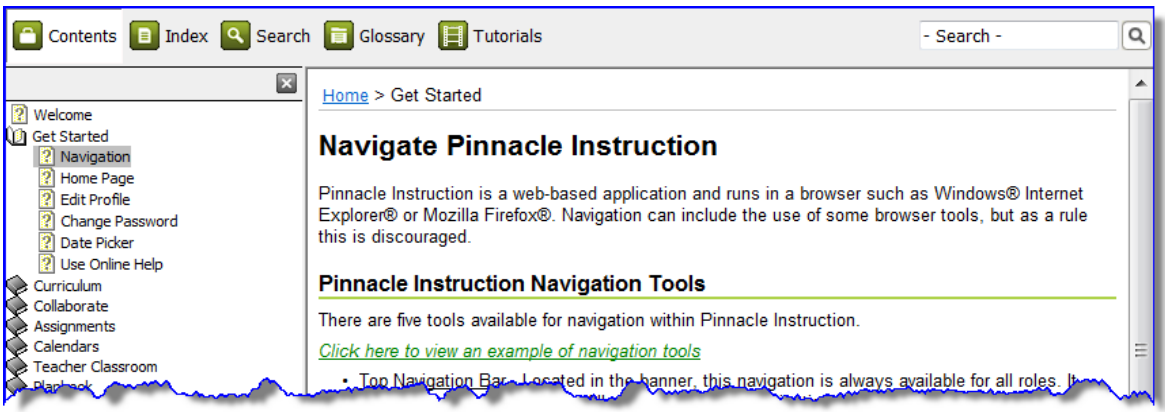
Date Pickers are available for date fields located on several task pages.

1. Click to open the Date Picker.
2. Click a date from the calendar. If you want to select a date from a different month, click a directional arrow to move forward or backward one month and then click a date.

Use the IMS Help

You can view Help topics for the IMS by clicking **Help** in the header of any page of the application. Help includes three areas: the toolbar, the navigation pane, and the information pane.

The navigation pane is on the left. You can re-size it to improve your view. Topics are displayed in the information pane in the center of the page. You can use the Help window scroll bar to move through longer topics, or click a different link from the navigation pane to select a new topic. Some topics include a link to other topics. If you navigate to a new topic using links from within a topic, use the browser **Back** button to return to the original Help topic.



Online Help

Contents

The Contents includes a series of topics arranged into books by subject. Click a book from the Contents list to expand it, and then select a topic to view. Within the navigation pane, you can click any open book to close or collapse it.

Most topics are written in a "how-to" format, beginning with a short introduction or explanation followed by step-by-step instructions.

Note: If you are not certain which book has the information you need, begin your search from the **Index** or **Search**.

Index

The Index provides a field for keyword(s) entry and beneath this area you find an alphabetical listing of all index words available within Help. You have two choices for using this tool. You can enter a word and allow the application to find it or you can search the listed words for the one you want.

If you use the keyword entry, the indicated word is highlighted in the index list. If your keyword does not have an exact match, the closest alphabetical match is highlighted in the index list.

To view the topic, click the index word from the list. If more than one topic is linked to the selected word, a submenu is displayed from which you can select a topic.

Search

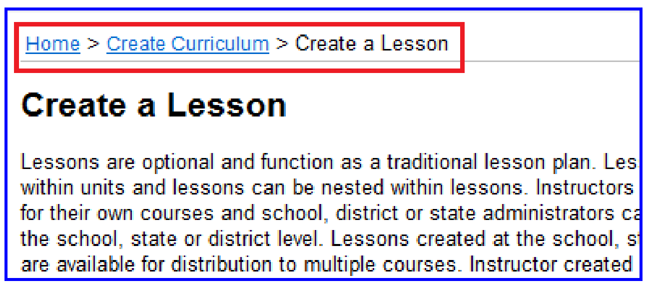
The Search tool allows you to search using the keywords you enter in the **Search** field. The search results are displayed in the area below the search field. Type a word for your search and click **Go**. The application performs an unrestricted search of all topics and any attached documents, and displays results in the navigation pane.

Glossary

The Glossary tool divides the navigation pane into two sections. The top section, labeled **Term**, lists glossary words alphabetically. Scroll through this list to locate the word you want. Click the word, and the definition appears in the lower section labeled **Definition**.

Bread Crumbs

The term "bread crumbs" is used to describe your navigational path through the Help system. This information is displayed in the upper left corner of all Help topics except the home page. Each link represents a link from the Contents. You can click any of the links to navigate back to the root, or click **Home** in the navigation path to return to the Help home page.



Bread Crumbs in Help

School Configuration

School Configuration Overview

School configuration refers to your organization, staff, student, course, and section information. The IMS is populated with this information from your district's Student Information System (SIS). This information is created in the SIS and then imported to the IMS through the RIDE Data Mart nightly. However, you must still perform some configurations here, such as creating administrators and assigning item bank roles.

Refer to the following topics for step-by-step information on school configuration.

- Organization Settings
- Set Up Staff and Students
- Assign Item Bank Roles
- Create Peer Review Teams
- Change Terminology Settings
- Attributes
- Folder Options
- Create a Course
- Create a Section
- Create Calendars

Organization Settings

RIDE completes most of the IMS architectural configuration and setup for your district. This includes creating the profiles for your district and for each school in your district. Although as the IMS administrator you have editing rights to these district and school profiles, it is unlikely that you will need to modify them.

View or Modify a District or School Profile

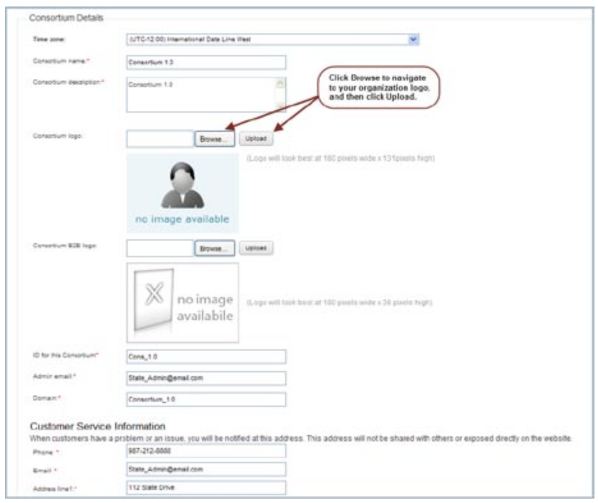
To modify a district profile, you must be an IMS district-level administrator.

1. Sign in with administrative rights, and on the top navigation bar, click **Manage**.
2. In the navigation pane, select the appropriate district or school.
3. On the pagebar, click **Profile**. The Details page opens. The fields on this page are self-explanatory.
4. To edit a field, in the upper right area of the page, click **Edit**. You can change any of the following fields, as necessary:
    - Time zone
    - District or school name *(see caution below)*
    - District or school description
    - Logos
    - Customer service information

Caution: Do *not* modify the ID for district/school, the Admin email, or the Domain. This information is populated by the district SIS through the RIDE data mart. Contact the district data manager for assistance if necessary

To Add a District or School Logo

1. Click **Browse**.
2. Locate a graphic file from your hard drive or external drive.
3. In the **Choose File to Upload** dialog box, click **Open**.
4. Click **Upload**.



Profile Details page

Setting Up Staff and Students

New teacher and student information must not be added directly into the IMS. This information is updated in your district Student Information System (SIS) only. Through an automated nightly process, new staff and student information is imported into the IMS. Any information added directly into the IMS will be overwritten and/or deleted by the nightly updates.

If you have new staff or students, please see your district SIS administrator and/or your district IMS administrator.

Assign Staff Member Roles to a Batch of Users

When users are imported into the IMS, you may want to assign roles to a large number of users at the same time, as described below.

1. On the Staff Information page, click **Filter**.
2. In the **Role** drop-down list, select the role to which you want to assign additional roles. For example, select **Gradebook User**.

3. Click **Update** to filter on the selected role. All staff members who are assigned that role are displayed.
4. Select the check boxes (to the left of the staff record) for the staff members to whom you want to assign the new staff roles.

> **Note:** To display additional staff records, change the **Show** selection at the bottom of the window to **500**. This enables you to view and select the largest number of users on the same window.

5. In the **More Actions** drop-down list, select **Assign Roles**. The **Assign Staff Member Role** window opens.

> **Note**: To assign roles to multiple users, the users you select must have identically assigned roles.

6. Select one or more roles to assign to the group of users.
7. Click **OK**.

Reset Staff Passwords

Staff member passwords are generated through the Single Sign-On (SSO) portal. If a staff member forgets his/her password, they can recover it via email using the SSO portal or they can contact the district's SSO Administrator. **The IMS functionality for recovering passwords will not work.** To reset the password for a staff member, you must contact your district's SSO Administrator.

Item Bank Roles

There are six roles associated with the item bank that can be assigned for IMS administrators and teachers. You can assign multiple roles. The roles and the tasks associated with each role are described below.

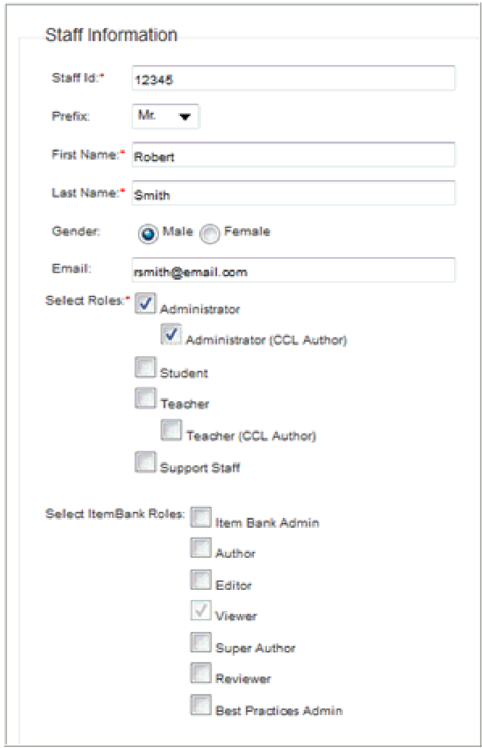
- **ItemBank Administrator**: Administrator role; creates the item bank container.
- **Author**: Authors create new items and revise items.
- **Reviewer**: Reviewers verify the validity of the items created by authors. They can add feedback and make recommendations.
- **Editor**: Editors approve the recommendations made by reviewers, and they can also make their own recommendations. Editors publish or reject items.
- **Best Practices Administrator**: Best practices administrators can mark questions in the item bank as complying with best practices.
- **SuperAuthor**: A person assigned the role of SuperAuthor can perform all item bank tasks.

Assign Item Bank Roles

As an IMS administrator, you can assign item bank roles to other administrators and teachers.

1. Sign in with administrative rights, and on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. In the **Setup** section of the At A Glance page, under **Staff**, click **Manage**.

4. Locate the administrator or teacher you want to assign a role to, and in the **Options** column, click the **Edit** icon. If a person is assigned the role of teacher or OrgAdmin, the item bank roles appear and can be assigned.



Staff Information window with Item Bank roles

5. Select the role of the staff member.
6. Select one or more item bank roles.

> **Note:** By default, those assigned the role of teacher or administrator have item bank viewer rights.

7. Click **Save**.

Related Topics:

[Item Bank Overview]

[Item Bank Content Creation and Review]

Peer Review Teams

You can create Peer Review Teams to review curriculum objects (units, lessons, activities, and assessments). When a peer review team approves a curriculum object, it is added to the Community Content Library (CCL), to be shared at the parent organization level (for example, the state or the district). All curriculum objects that have been approved by a peer review team are designated as "best practice" objects. The object is then available for teachers throughout the organization to use in their classes. Peer review teams are composed of selected staff from across the organization with expertise in a given area (for example, 7th grade mathematics).

A teacher or administrator must have CCL author rights to share objects to the CCL and to submit objects for peer review. Once submitted, the curriculum object appears under **Tasks** on the home page of each member of the peer review team.

The Peer Review Team workflow must be configured. Your district may choose a one-step process or two-step process for review.

Peer Review Tasks

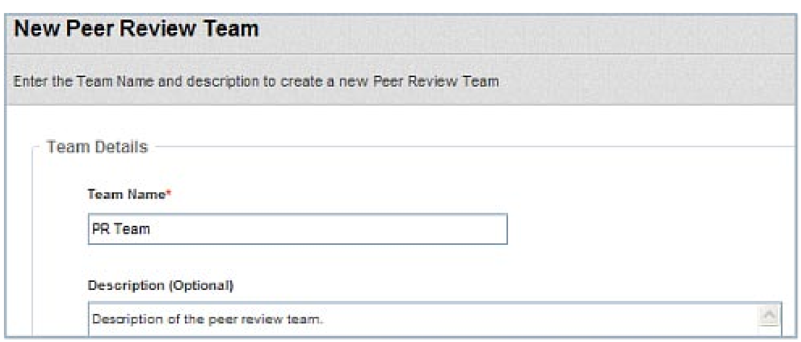
Refer to the following topics for step-by-step instruction:

- Create Peer Review Teams
- Edit Peer Review Teams
- Peer Review Process

Create Peer Review Teams

Only IMS administrators can create peer review teams.

1. Sign in with administrator rights, and on the top navigation bar, click **Manage**.
2. On the pagebar, click **Peer Review Teams**.
3. In the navigation pane, select an appropriate organizational level (state, consortium, district, or school).
4. On the toolbar, click **New**. The New Peer Review Team page opens.

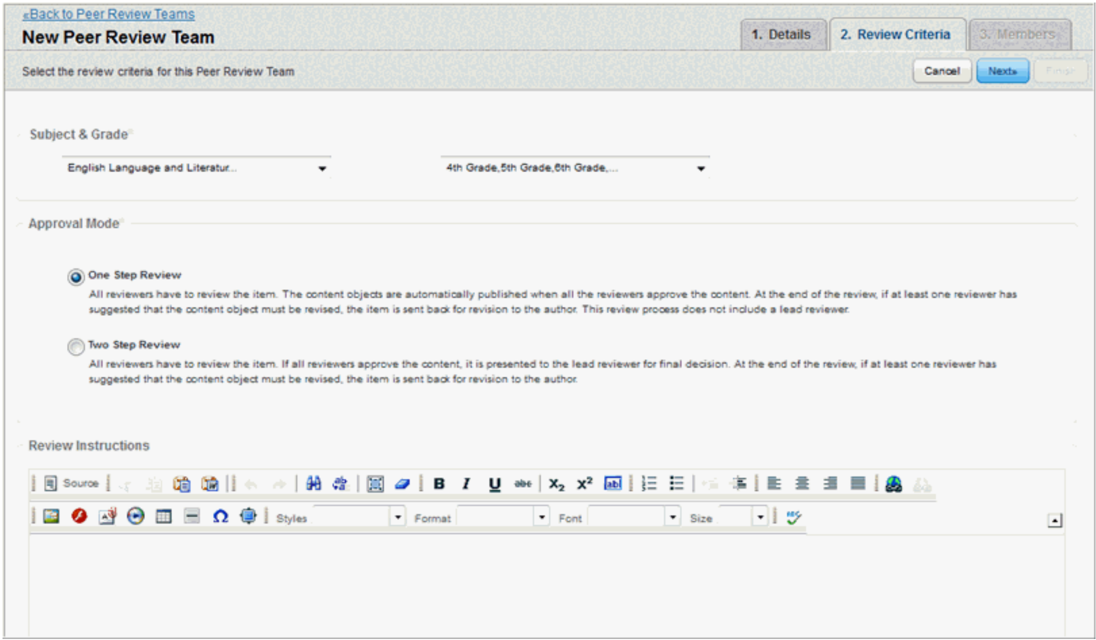


Details tab

5. In the **Details** tab, type a **Team Name**.

   Optional: Type a **Description** for the team.

6. Click **Next**.

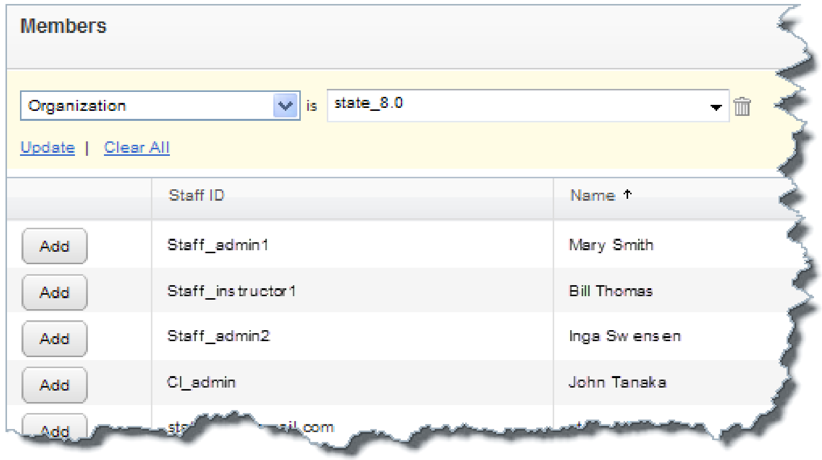


Review Criteria tab

7. In the **Review Criteria** tab, select a **Subject** area and one or more **Grade** levels for the team focus.
8. Select **One** or **Two Step Review** process.
   - **One step**: All team members assigned the role of reviewer must approve the object before it can be published.
   - **Two step**: All team members assigned the role of reviewer must present their reviews to the lead reviewer for a final decision.

   Optional: Type **Review Instructions**. You can enter text or attach files that reviewers can use as instruction or a rubric for evaluating the item.

9. Click **Next**.
10. On the **Members** tab, on the toolbar, click **Add Member**.



Members tab

Optional steps:

- To find a specific person, type a staff ID or last name in the **Search** field and click the **Search** icon.
- Use filters to refine search results.

11. Locate the staff you want to add to the team and click **Add** next to each **Staff ID**..
12. Click **Done** to close the **Members** tab.

    Optional: If you selected two-step review in step 7, select an individual in the **Lead Reviewer** column, to identify the one member of the team who will act as final approver.

13. On the **Members** tab, click **Done**.

Edit Peer Review Teams

Only IMS administrators can edit or delete peer review teams (PRT). Rights to modify PRTs follow a parent/child organizational structure. For example, if you have rights to modify at the district level, you inherit modify rights to schools within the district.

Edit a Peer Review Team

1. Sign in with administrator rights and, on the top navigation bar, click **Manage**.
2. On the pagebar, click **Peer Review Teams**.
3. In the navigation pane, select an appropriate organizational level (state, consortium, district, or school).

    Optional steps:

    - Use filters to refine the results.
    - Type a PRT name in the **Search** field and click the **Search** icon to find the appropriate team.

4. In the **Actions** column, click the **Edit** icon to open the team profile. Follow steps from Create a Peer Review Team to make appropriate changes.
5. Click **Finish** to save your changes.

Delete a Peer Review Team

- **Single Team**: Follow steps 1 and 2 above, and, in the **Actions** column for the appropriate team, click .
- **Multiple Teams**: Follow steps 1 and 2 above, select check boxes for appropriate teams, and in the toolbar, click to remove all selected teams.

Note: If you delete team members while a review is in progress, a warning appears to let you know this will affect the review. If you delete a lead reviewer profile from the **Staff** listing, the organization IMS administrator must appoint a new lead reviewer.

Note: If a lead reviewer is missing, a **Caution** icon appears in the **Lead Reviewer** column to indicate that no reviewer is assigned, though one is required.

Peer Review Process

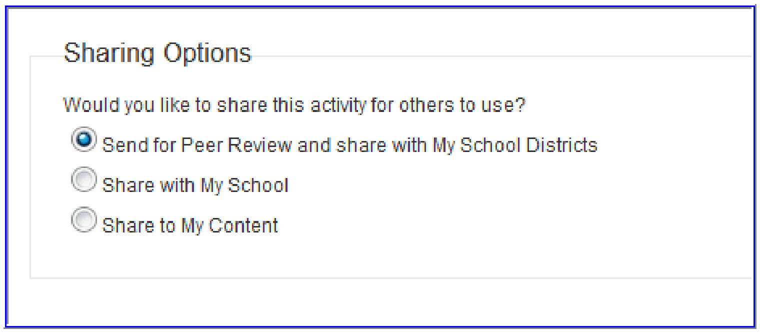
When a teacher or administrator with CCL Author rights submits a curriculum object for peer review, the IMS assigns the object to an appropriate peer review team. The selection of a peer review team is based on the subjects and grades specified when the peer review team was created. When the object is assigned to a peer review team, a peer review task appears on the Tasks page for each member of that team.

Note: The Tasks page is also referred to as the Work Baskets page.

Submit Objects for Peer Review

A teacher or administrator must have CCL Author rights to submit curriculum objects for peer review. CCL authors submit objects for review from the object **Sharing** tab. Templates define peer review options (required, optional, or not enabled). If the item you create does not list an option for peer review, check the associated template to verify that the peer review option is available.

1. Follow appropriate steps to create a unit, lesson, activity, or assessment.
2. When you reach the **Share** tab, select **Send for Peer Review**. The item then appears for appropriate PRT members on their Tasks page.



Note: If you select **Send for Peer Review**, the object is saved to **My Content** until it has successfully completed the peer review process.

Note: Curriculum objects that successfully go through the peer review process are made available to teachers throughout the parent-level organization (for example, the district). CCL authors can also share their objects only with their school. In this case, the object does not go through the peer review process.

Review Community Content Library (CCL) Objects

To review CCL submissions, peer review team members do the following:

1. On the Home page, in the **Tasks** section, click **Community Content Library Submissions**.
2. Locate the **Status** column. For each object with a status of **Requires Review**, click the **Title**.
3. Review the content displayed in the lower pane.
   - Click **Browse this <*object*>** to open the object **Preview**, **Details**, and **Review** tabs for more information.
   - Click the **Review Instructions** tab to read information created for the PRT.
   - For objects you select to **Revise**, type instructions to share with the author in the **Review** tab text box.
   - Type in the **Comments** tab text box and click **Submit Comments** to share with other reviewers.
4. On the **Review** tab, click either **Approve** or **Revise**.

   Final approval of the curriculum object depends on whether the peer review team is configured for a one-step process or two-step process.

   - For a team with a one-step process, after all members of the peer review team have approved the object, the object is automatically approved and added to the CCL, designated as a "Best Practice." If one or more reviewers have selected **Revise**, the object is returned to the author for revision.
   - For a team with a two-step process, the Lead Reviewer must approve the object after it has been approved by all of the other peer review team members. Once the Lead Reviewer has approved, the object is added to the CCL, designated as a "Best Practice." If one or more reviewers have selected **Revise**, the object is returned to the author for revision.

Check Submitted Object Status

Authors can check the status of submitted objects on the Work Baskets page.

1. On the Home page, in the **Tasks** section, click **Community Content Library Submissions**.
2. Locate the object you submitted and view the **Status** column.
3. For each object with a status of **Pending Revision**, click the hyperlink **Title**.
4. From the toolbar, click **View History** to read any **Review** or **Comment** text.

Author Resubmit from CCL

If a curriculum object is determined to require revisions, the author can make changes to the content and resubmit the object.

1. On the top navigation bar, click **Applications** and select **Community Content**.
2. On the **My Shared Content** tab, locate the item you want to resubmit.

   Optional: Type the item name in the **Search** field and click the **Search** icon, or use filters to narrow your results.

3. In the **Actions** column, click the **Edit** icon. A new window opens.
4. Click **Edit** to make appropriate changes and **Finish** to save.
5. Click **Submit Item** to resubmit.

Attributes

There are three types of attributes that can be associated with curriculum objects to facilitate search and filtering. The attribute types are:

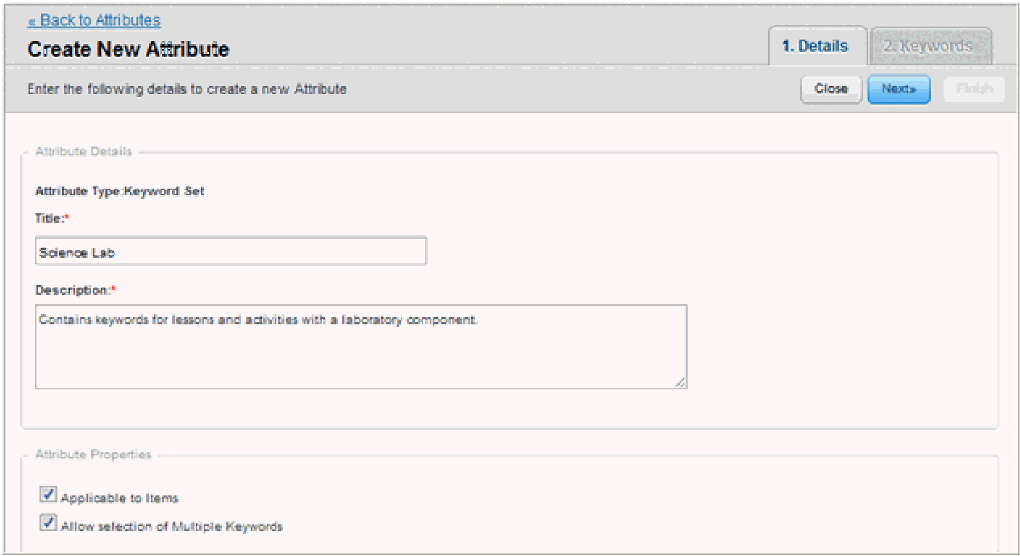
- **Tags**: Free-form text that content creators can associate with curriculum objects. Content creators can edit the tag name and description, as appropriate for the curriculum they are creating.
- **Keyword Sets**: Groupings of keywords, or tags, that are predefined by the top-level administrator.
- **Basic Attributes**: Text properties such as copyright or version information.

The Tag attribute is set up by default. The top-level administrator creates Keyword Sets and Basic Attributes, and determines whether they can be applied to item bank items as well as curriculum objects. The Tag attribute is set to apply to items by default.

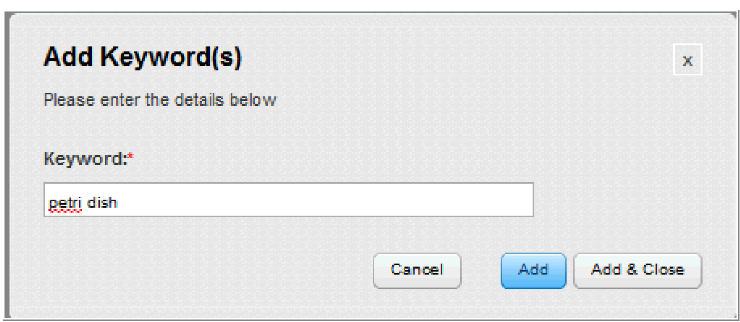
To create a Keyword Set:

1. Sign in as a top-level administrator and, on the top navigation bar, click **Manage**.
2. On the pagebar, click **Attributes**.
3. On the toolbar, click **Create New Attribute** and select **Keyword Set**. The Create New Attribute page opens.
4. Type a **Title** and **Description** for the Keyword Set.
5. If appropriate, select **Applicable to Items**. Selecting this will allow content creators to tag items in their assessments, as well as in the item bank, with keywords contained in this set.

6. If appropriate, select **Allow selection of Multiple Keywords**.

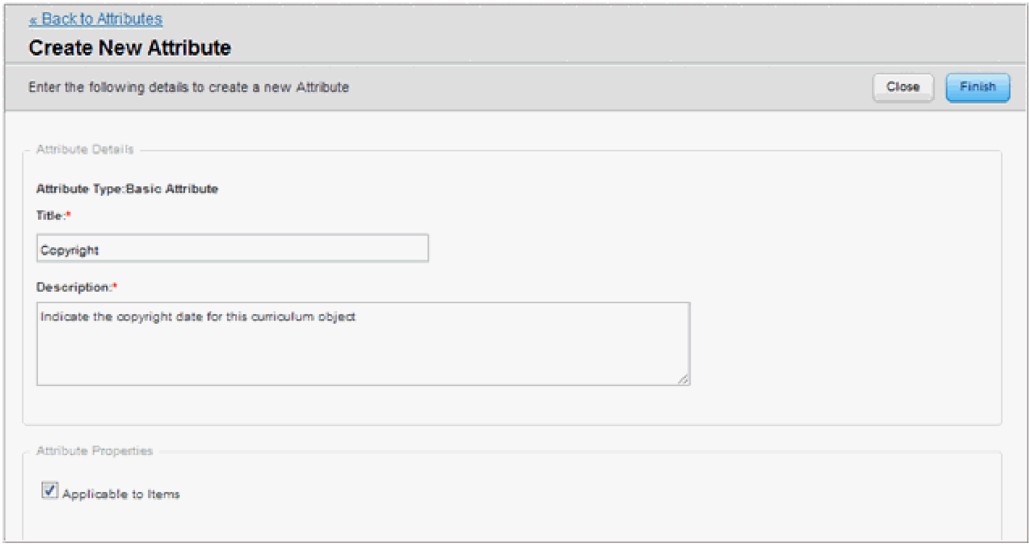


7. Click **Next** to move to the **Keywords** tab.
8. In the toolbar, click **Add Keyword**.
9. Type a keyword, and then click **Add** to add the next keyword, or click **Add & Close** to finish adding keywords and return to the Create New Attribute page.

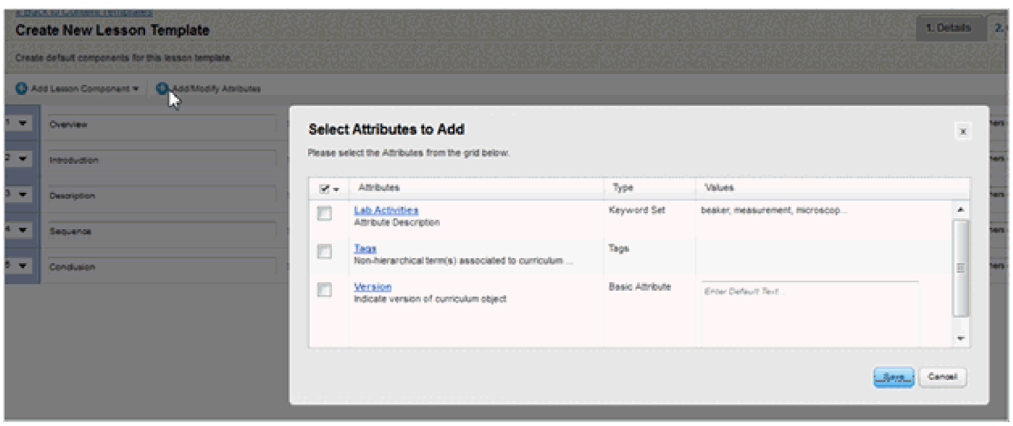


To Create a Basic Attribute:

1. Sign in as a top-level administrator and, on the pagebar, click **Attributes**.
2. On the toolbar, click **Create New Attribute** and select **Basic Attribute**. The Create New Attribute page opens.
3. Type a **Title** and **Description**.
4. If appropriate, select **Applicable to Items**.



Once attributes are created, IMS administrators can associate them with content templates on the **Component** tab of the template wizard.



When creating curriculum objects based on templates with which the attributes are associated, teachers and administrators see these attributes on the **Component** tab and enter appropriate values.

Folder Options

IMS administrators can apply terminology changes to units and lessons, relabeling those learning objects to conform to language used at the state or district level. They can also manage school terms (that is, divisions of an academic year) for all organizations within the IMS.

Relabeling Folders

Platform administrators can relabel units and lessons, for example as folders and subfolders. The platform administrator can apply the terminology set for a state, as well as all organizations within that state. State IMS administrators can then apply the terminology set(s) that will be available to individual districts when creating templates and curricula. District IMS administrators can overwrite state terminologies to apply terminology that is applicable to the district and all schools within the district.

For more information on relabeling folders, see Terminology Settings.

Manage Terms

Terms, or divisions of an academic year, are set at the platform level to ensure consistency throughout the organization. Platform administrators can add, edit, or delete terms at the platform level, and they can also determine if the term component will be available in content templates.

When creating unit templates, state or district IMS administrators can select a term as a component, once the term has been defined at the platform level.

Note: If you are using the Pacing Guide view of curriculum, you must include the Term component in all units.

Terminology Settings

Many terms within the IMS can be labeled to meet your state, district, or school-preferred verbiage. For instance, the application may refer to learning standards as "standards." Your school may use the term "objectives" or the full title, "Learning Standards."

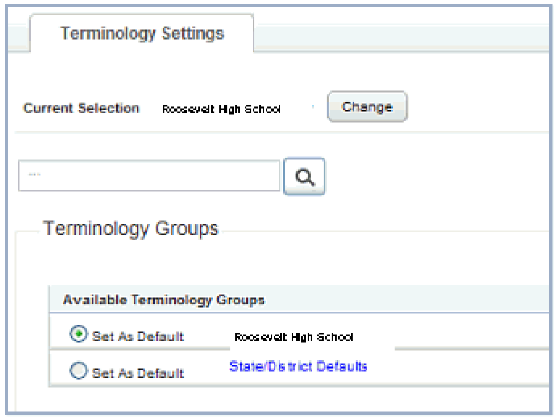
Note: You must work with your RIDE IMS representative to identify which terms can be customized and to create a conversion table that correctly correlates to appropriate database tables. Each conversion table is a group. You can create more than one group of terminology settings.

IMS administrators can select the appropriate **Terminology Group** for a selected organization. The selected terminology appears throughout the IMS for all users of the application within that organization.

Reminder: This feature must be configured with your RIDE implementation representative.

1. Sign in with administrator rights and, on the top navigation bar, click **Manage**.
2. On the pagebar, click **Settings**.
3. In the left navigation pane, select the appropriate organization. The selected **Terminology Group** appears as the **Current Selection**.
4. Click **Change** to select a different group.

   Optional: Type a group title in the search field to filter your listing by group name.



Terminology Groups settings

5. In the **Available Terminology Groups** list, select a group.

   Optional: Click the group title to view the selected terms and preferred verbiage for the group.

6. Click **Save**.

Create an Academic Course

Only IMS administrators can create academic courses for students. Creating courses has a parent/child relationship. By default, courses you create at a higher level are available for all organizations below it. For example, if you create a course at the district level, the course is available to all schools within the district.

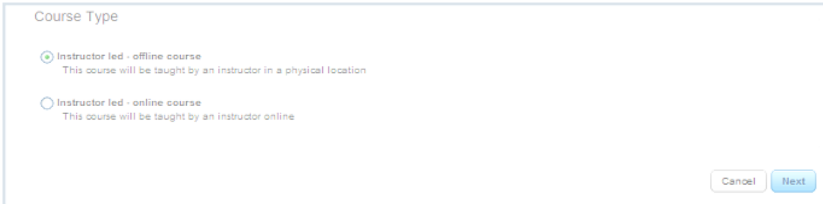
Caution: This information is populated by your district SIS through the RIDE data mart. If you create a course directly in the IMS, it will be overwritten by your SIS during the nightly update. You must create courses in your district SIS only

Note: A curriculum must exist before you create a course. See Create a Curriculum.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate consortium/district/school.
3. In the **Setup** section of the At A Glance page, under **Courses**, click **New**.

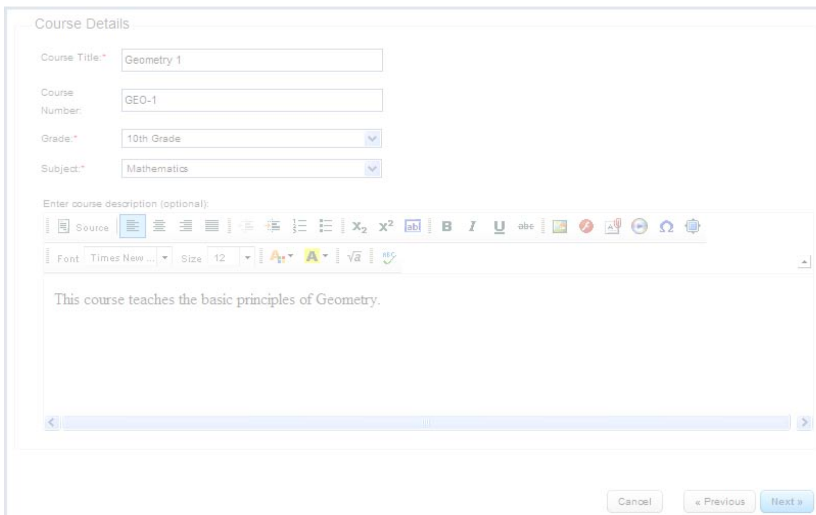
   Note: Depending on your setup, the **New Course** link may not be available. In that case, you do not have permissions to create courses.

4. Select the appropriate delivery type:
   Instructor led - offline or **Instructor led - online**.



Course Type window

5. Click **Next**.
6. Type or select appropriate information to complete course details. Many fields are optional. Required fields are denoted with an asterisk.



Course Details window

7. Click **Next**.
8. Click **Add Curriculum**.
9. Select one or more curricula and click **Apply & Close**.

Curricula window

10. Click **Finish**.

> **Note:** You must create a section before you assign the course to a teacher or enroll students in it.

Related Topic:

[Create a Curriculum]()

Create an Academic Section

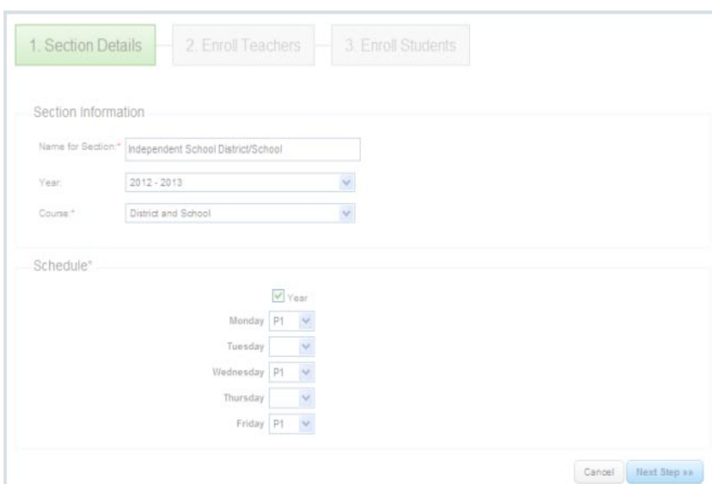
A section determines when a class is in session, what course is taught, and who attends and teaches the course. Only IMS administrators can create sections. Sections are specific to a school and must be created at the school level.

Caution: This information is populated by your district SIS through the RIDE data mart. If you create a section directly in the IMS it will be overwritten by your SIS during the nightly update. You must create sections in your district SIS only.

> **Note:** A course must exist and staff must be added before creating a section. See Create A Course and Setting Up Staff and Students.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school.
3. In the **School Setup** section of the At A Glance page, under **Sections**, click **New**.

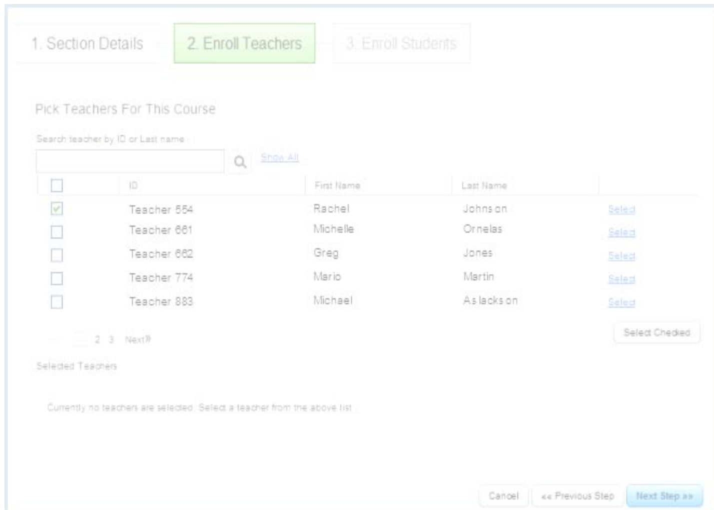
> **Note**: Depending on your setup, the **New Section** link may not be available. In that case, you do not have permissions to create sections.



Section Details window

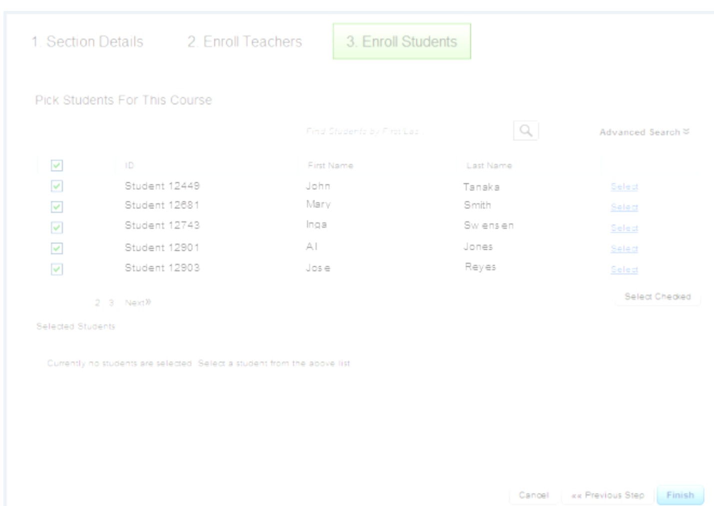
4. Type a **Name for Section**.

5. Select a **Year** and **Course**.
6. In the **Scheduling** section, select one or more marking periods.
7. Select a time from the appropriate day(s) drop-down list(s) to assign a class schedule.
8. Click **Next Step**.
9. Click associated check boxes for one or more teachers, and click **Select Checked** to assign teachers.



Enroll Teachers window

10. Click **Next Step**.



Enroll Students window

11. Click associated check boxes for one or more students, and click **Select Checked** to enroll students.
12. Click **Finish**.

Related Topics:

Create a Course

Setting Up Staff and Students

Create an Online Professional Development Academy

In order to more easily facilitate the scheduling of teachers for professional development, districts can create a professional development academy which acts as a separate school. Teachers from all schools in the district can then be registered for any professional development courses loaded for that academy. The procedure for creating these academies will be included in this document at a later date. Please check the IMS webpage for the most current revisions of all IMS manuals. http://www.ride.ri.gov/Division-EEIE/IMS.aspx

Related Topic:

Create a Curriculum

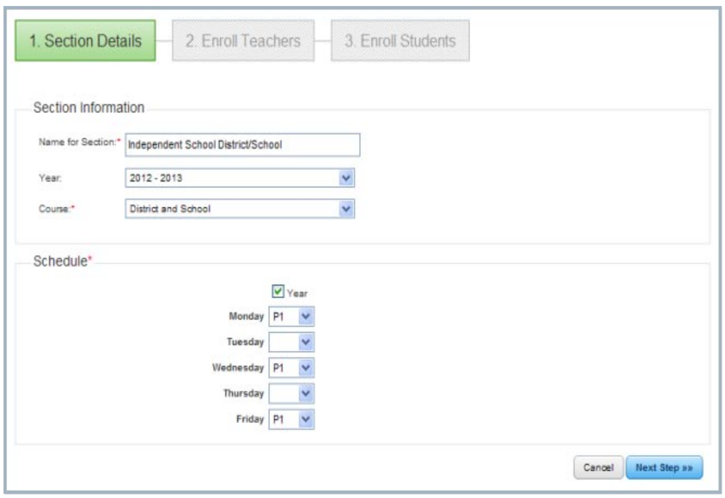
Create a Professional Development Section

A section determines when a class is in session, what course is taught, and who attends and teaches the course. Only IMS administrators can create sections. Sections are specific to a school and must be created at the school level.

Note: A course must exist and staff must be added before creating a section. See Create A Course.

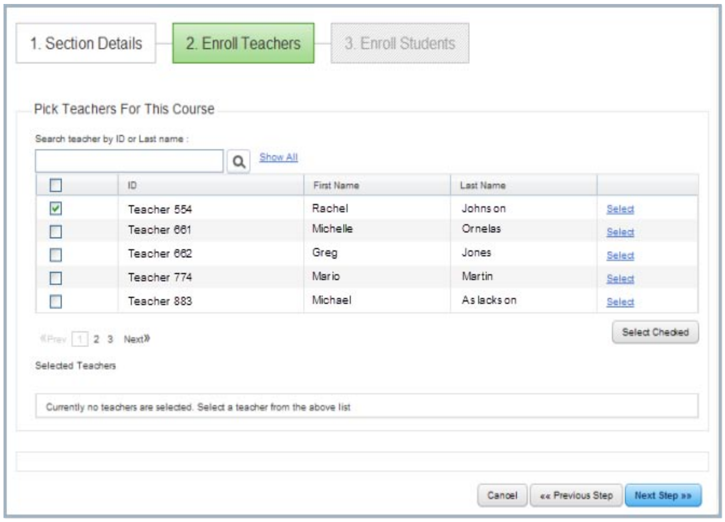
2. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
4. In the navigation pane, select an appropriate school.
5. In the **School Setup** section of the At A Glance page, under **Sections**, click **New**.

Note: Depending on your setup, the **New Section** link may not be available. In that case, you do not have permissions to create sections.



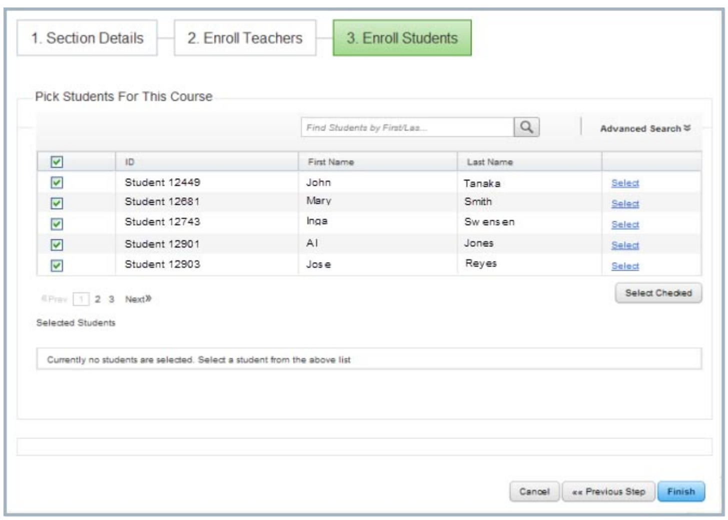
Section Details window

10. Type a **Name for Section**.
11. Select a **Year** and **Course**.
12. In the **Scheduling** section, select one or more marking periods.
13. Select a time from the appropriate day(s) drop-down list(s) to assign a class schedule.
14. Click **Next Step**.
15. Click associated check boxes for one or more teachers, and click **Select Checked** to assign teachers.



Enroll Teachers window

11. Click **Next Step**.



Enroll Students window

13. Click associated check boxes for one or more students, and click **Select Checked** to enroll students.
14. Click **Finish**.

Related Topics:

Create a Course

Setting Up Staff and Students

Calendars

Calendars Overview

Calendars track and manage events and activities at the district, school, class, and personal levels. Your view of calendar entries depends on the rights assigned to you (teacher, administrator). Multiple configuration tools allow you to change the layout and view for your calendars. Additional tools allow administrators to group related events and activities and save them as category calendars, which teachers can use to filter displays.

Types of Calendars

- **District Calendars:** District administrators enter district-level events such as vacation schedules, in-service days, and district assessments. Anyone at the district level or below can view the district calendar.
- **School Calendars:** School administrators make school-level entries, such as athletic events and student assemblies. School staff members can view the school calendar. District-level personnel cannot view school-level calendars.
- **Class Calendars:** Class calendars feature scheduled curriculum and meetings that the teacher creates.
- **Personal Calendars:** Every teacher who has access to the IMS has a personal calendar that displays the meetings and events from the calendars they have rights to view. For example, a teacher's personal calendar would display district and school events, meetings with students and parents, department meetings, and personal calendar entries they make. Each person can click **My Calendar** in the navigation pane to view his personal calendar. No one can view another's personal calendar.

Calendar Tasks

You can perform the following tasks when working with calendars:

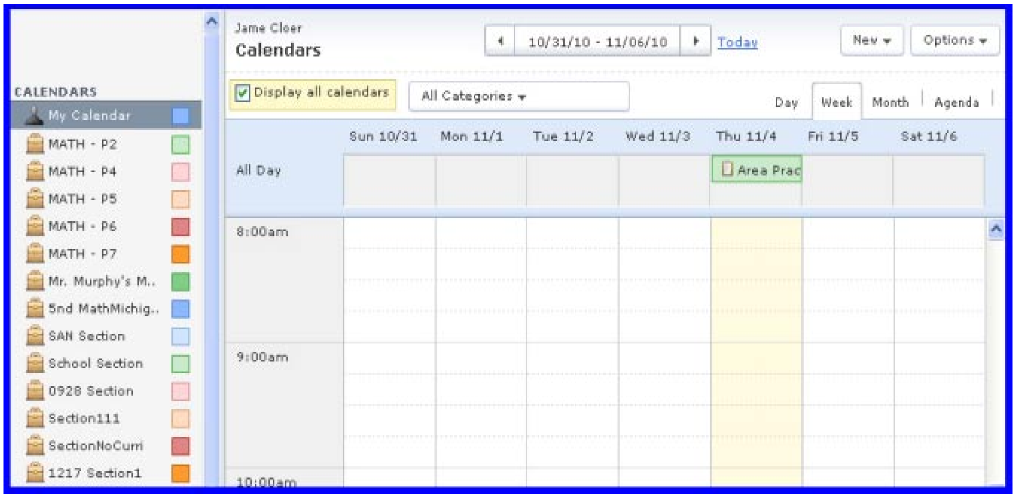
- View Your Calendars
- Change the Calendar Layout and Appearance
- Add Events and Meetings
- Configure Calendar Categories
- Export or Import Calendar Data

View Your Calendars

IMS administrators access calendars at the district and school levels.

1. On the top navigation bar, click **Manage**, and in the navigation pane, select an appropriate district/school.
2. On the pagebar, click **Calendar**. The class calendar opens.

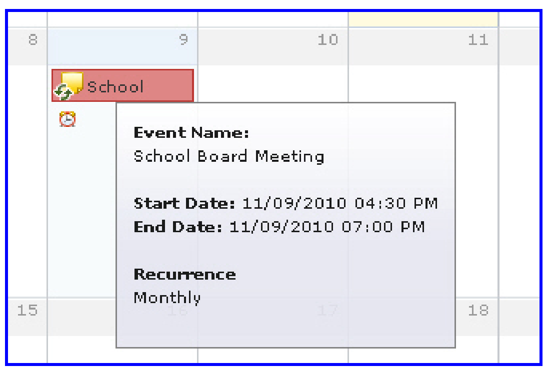
   Alternatively*:* **Calendar** may be available from the **Applications** button in the top navigation bar. This displays your personal calendar.



Personal Calendar page

View Calendar Details

1. Hover over a calendar entry to view summary information. This display includes details of the meeting or event in a tool tip.



Meeting or Event Details in Calendar page

2. To view full details, click the entry to open a window that displays item details.

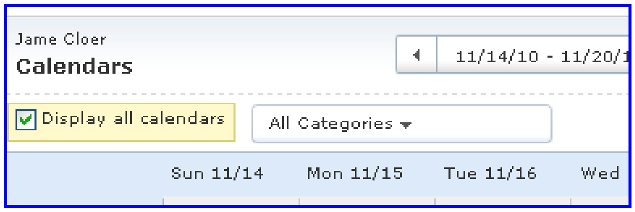
Combine Calendars

When you first view your personal calendar, it displays events and meetings from all calendars you have rights to view. You can choose to show items from all calendars or view items from only one calendar at a time.

- To view a single calendar, clear the **Display all Calendars** check box above the calendar, and in the left navigation pane, select a class, school, or district. The display changes to reflect the calendar for the organization or class you select.

> **Note:** If you open the calendar from the **Teach/Attend** path, click **Options** in the upper right of the calendar and select **Customize** to make single/combined calendar selections.

- To view meetings and events for all of your calendars, select **Display All Calendars**.



Display All Calendars check box

Show Events from Different Calendar Categories

IMS administrators can create categories for calendar items. If categories are available in district or school-level calendars, you can configure your view to display all items or only items from a specific category.

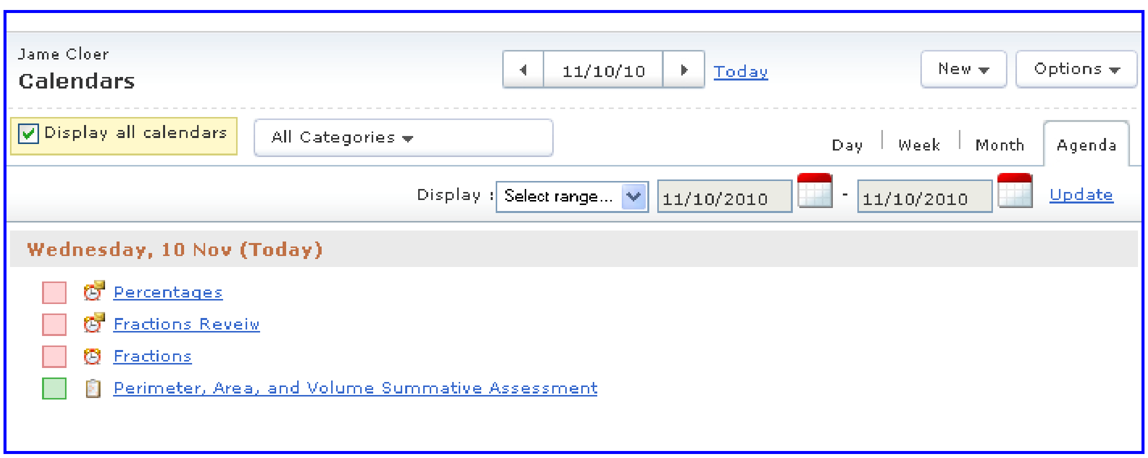
- Click the **All Categories** list above the calendar and select a calendar category.

Change the Calendar View

When you first open a Calendar, the default display is the current week. You can change the view to show day, week, or month, or agenda views. Click any of the tabs above the calendar to change your view (**Day, Week, Month, Agenda**).

Agenda displays a list of days you have events and meetings scheduled. Days without scheduled items are not displayed. You can change the display for the **Agenda** option.

- To display items for a single day, week, or month: In the **Display** list, select **By Day**, **By Week**, or **By Month**.
- To display items for a specific range of days: In the **Display** list, select **Select Range**, type or select a start and end date for the range in the **Date** fields, and then click **Update** to populate the agenda list.

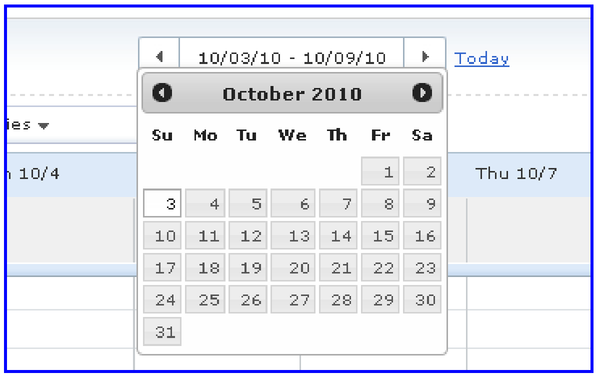


Agenda Options in Calendar page

View Different Dates in the Calendar

Calendars display the current day, week, or month (depending on the calendar view). You can change the view to a different date.

- Use the date arrows above the calendar to move backward or forward by a day, week, or month.
- Click the date range above the calendar and select a new date from the calendar.
- Click the **Today** link to jump to the current date.



Date Selection in the Calendar page

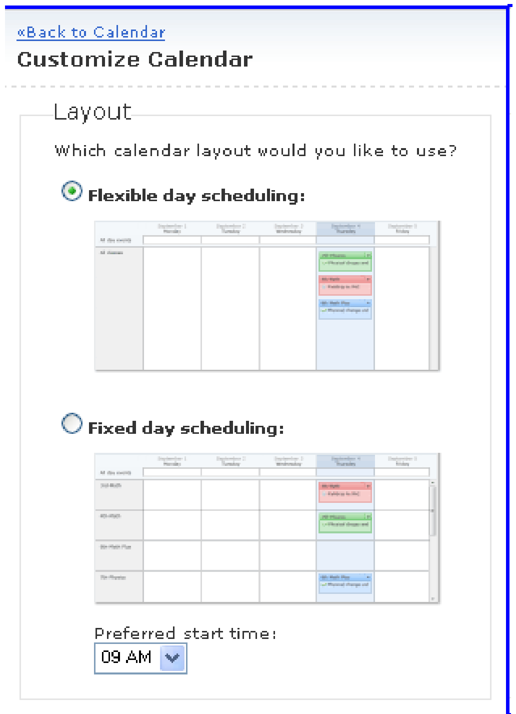
Change the Calendar Layout and Appearance

You can change the layout and appearance of calendars. There are two layout options available for viewing calendars.

- **Fixed Day:** The scheduled items for all calendars appear together in a single calendar organized by time slots.
  - The first line in the calendar lists events created as All Day events.
  - If multiple events are scheduled at the same time on the same day, they are listed next to each other on the calendar.
- **Flexible Day:** Each of your calendars appears on a row in the calendar grid, in a task layout without specific time slots.

Change the Calendar Layout

1. Click **Options**, and then click **Customize Calendar**. The Customize Calendar page opens.
2. Select either **Flexible Day Scheduling** or **Fixed Day Scheduling**.
3. Select a **Preferred Start Time** from the drop-down list. This is the time that appears at the top of the calendar in **Fixed Day** layout.
4. Click **Save**.



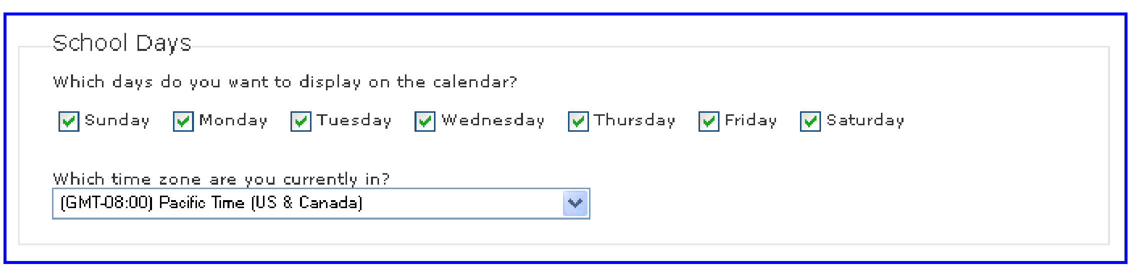
Customize Calendar page

Change Number of Days in Display

The weekly calendar shows all days of the week by default. You can change this if, for example, you prefer to view only the five day work week.

1. Click **Options**, and then click **Customize Calendar**. The Customize Calendar page opens.
2. In the **School Days** section, clear the check boxes for days you want to omit from your weekly calendar.
3. Click **Save**.

Note: This change affects only the weekly view of your calendars.

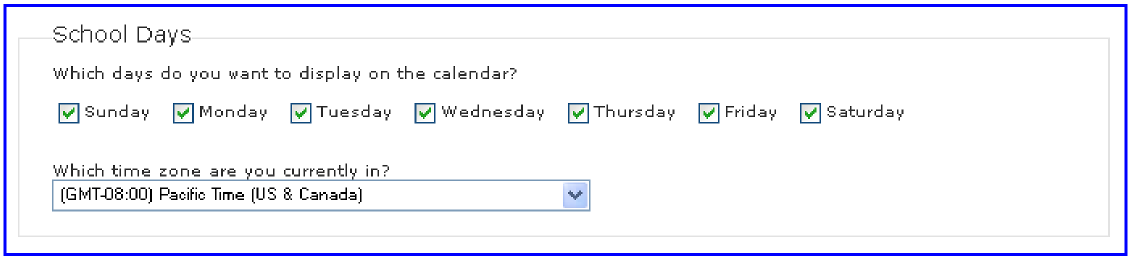


Customize Calendar page - School Days options

Change Time Zone

Scheduled times use the time zone from your user account Personal Information page. If you travel, you may want to change your time zone so calendars reflect the local time.

1. From your calendar, click **Options** and select **Customize Calendar**. The Customize Calendar page opens.
2. In the **School Days** section, select a time zone from **What Time Zone Are You Currently In?**



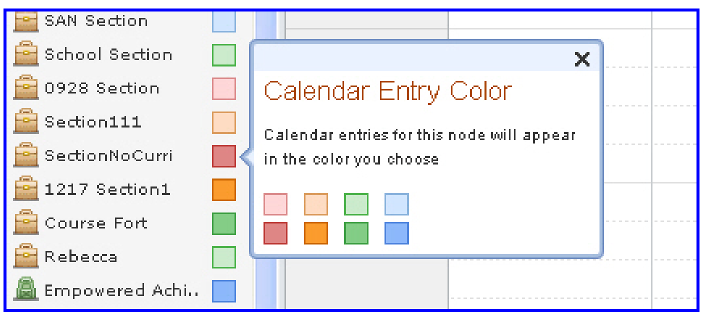
Customize Calendar page - Time Zone options

3. Click **Save**. Events and meetings are updated to reflect the new time zone.

Change Category Colors

Events and meetings are color-coded. You can change calendar colors.

1. In the navigation pane, click the color block next to the calendar.



Calendar Entry Color dialog box

2. In the **Calendar Entry Color** dialog box, click a color for the calendar. The new color choice is applied to all scheduled items on the selected calendar.

Events and Meetings

IMS calendars include two types of entries: events and meetings. Calendar entries can be one-time, recurring, or all-day items.

- **Events:** Events affect everyone at a specific organization level, such as a district or school. IMS administrators add events to district or school calendars, and everyone with rights to view the calendar can view the event. Events do not have invited attendees. Only IMS administrators can create events.

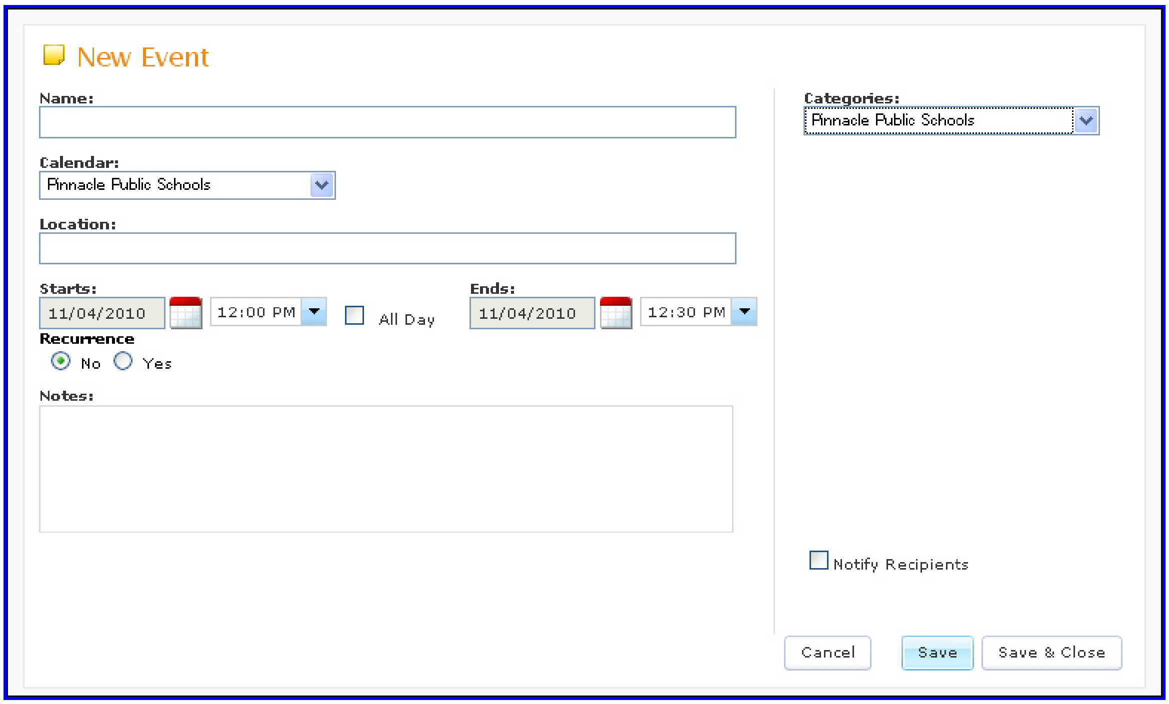
- **Meetings:** Meetings are calendar entries that are sent to invited attendees. Only the organizer and the invited attendees view meetings. Administrators and teachers can create meetings.

Add an Event to a Calendar

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district or school.
3. On the pagebar, click **Calendar**.

   Alternatively: **Calendars** may be available from **Applications** in the top navigation bar.

4. Click **New**, and then click **Event**. The **New Event** dialog box opens.



New Event page

5. Type a **Name** for the event.
6. Select the **Calendar**.

   Optional: Type a **Location** for the event.

7. Type the **Starts** and **Ends** dates or select dates from the date picker.
8. In the drop-down lists, select the event start and end times, or select the **All Day** check box. All-day events appear at the top of the calendar instead of in a specific time slot.

   Optional: Under **Recurrence**, select **Yes**, and type or select appropriate information in the fields in the **Add Recurring Meeting** dialog box.

   Optional: If your organization has calendar categories, select from the **Categories** list.

> **Note:** A category is a special interest calendar that exists below the organization's calendar. For example, in the district calendar you may have a vacation calendar as a category. For more information, see Calendar Categories.

Optional: Select the **Notify Recipients** check box if you want all members of the organization to receive an email notification of the event.

> **Caution: Notify Recipients** is not recommended for district and school-level calendars because it generates a large amount of email that might not be necessary.

Optional: Type any comments in the **Notes** field.

9. Click **Save** or **Save & Close**.
   - **Save** leaves the **New Event** dialog box open so you can add another event.
   - **Save & Close** saves the event and closes the dialog box.

Add a Meeting to a Calendar

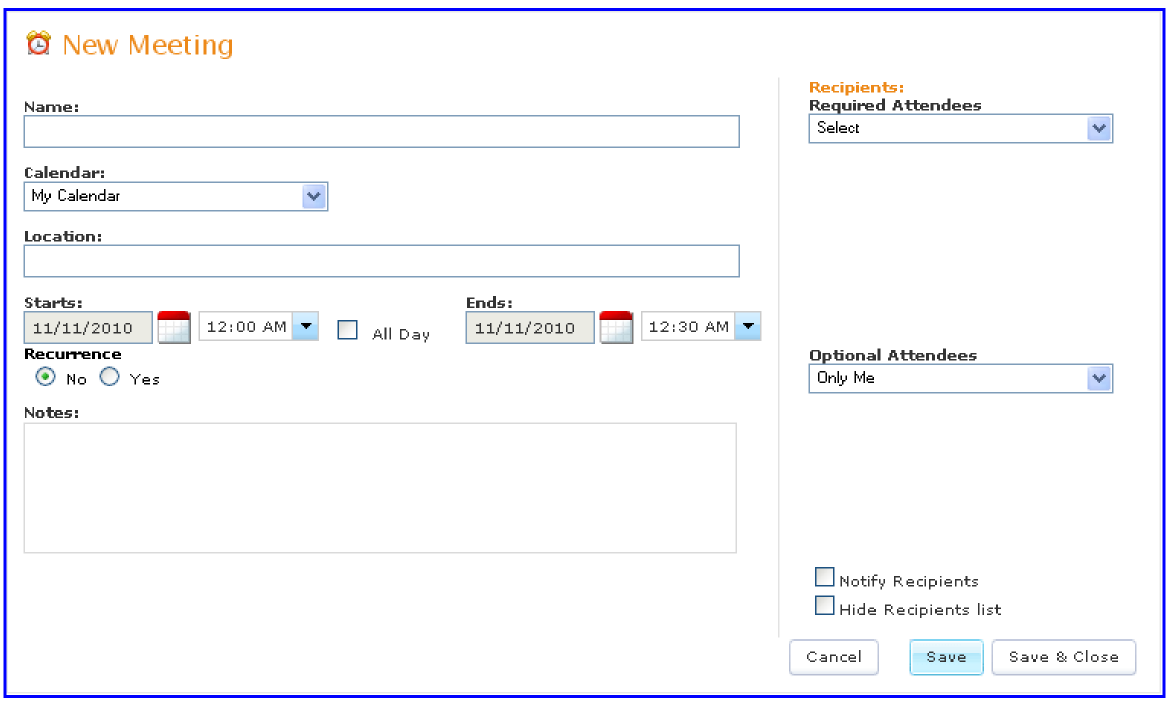
Administrators and teachers can add meetings to a calendar.

1. On the pagebar, click **Calendars**.

   Alternatively: **Calendars** may be available from **Applications** in the top navigation bar.

2. Click **New** and select **Meeting**. The **New Meeting** dialog box opens.

   Alternatively: On the calendar, point to a time slot and click the **Create Meeting** icon.



New Meeting page

3. Type a **Name** for the meeting.
4. Select the **Calendar**.

Optional: Type a **Location** for the meeting.

5. Type or select the **Starts** and **Ends** dates.
6. In the drop-down lists, select the meeting start and end times, or select the **All Day** check box. All-day meetings appear at the top of the calendar instead of in a specific time slot.

   Optional: Under **Recurrence**, select **Yes**, and type or select appropriate information in the fields in the **Add Recurring Meeting** dialog box.

   Optional: If your organization has calendar categories, select from the **Categories** list.

> **Note:** A category is a special interest calendar that exists below the organization's calendar. For example, in the district calendar you may have a vacation calendar as a category. For more information, see Calendar Categories.

   Optional: Select the **Notify Recipients** check box if you want all members of the organization to receive an email notification of the event.

   Caution: **Notify Recipients** is not recommended for district and school-level calendars because it generates a large amount of email that might not be necessary.

   Optional: Type any comments in the **Notes** field.

7. Click **Save** or **Save & Close**.
   - **Save** leaves the **New Event** dialog box open so you can add another meeting.
   - **Save & Close** saves the meeting and closes the dialog box.
8. Under **Recipients**, select the required and optional attendees from the drop-down lists.

   Optional: Select **Hide Recipients List** to send notifications to each recipient without including all addresses in the **To** field.

9. Click **Save** or **Save & Close**.
   - **Save** leaves the **New Meeting** dialog box open, so you can add another meeting.
   - **Save & Close** saves the meeting and closes the dialog box.

   The new meeting is added to the invited attendees' calendars.

When you create or edit a meeting in the IMS, recipients receive messages as follows:

- **New meetings:** All recipients, both required and optional, receive a message. Required recipients must accept or decline the invitation, and the meeting organizer receives a message when recipients respond.
- **Edit meetings:** When the organizer changes the title, location, date, time, or notes, the recipients receive a message that details the changes to the meeting.
- **Edit recipients list:** When the organizer changes the recipients list, only people who are added to or removed from the meeting receive a message.
- **Canceled meetings:** When an organizer cancels a meeting, everyone, both required and optional recipients, receives a cancellation message.

Edit a Meeting or Event

You can edit details of any meeting or event you created.

1. Click an item in the **Calendar**. If you created the item, the **Edit Meeting** or **Edit Event** dialog box opens.
2. Update the meeting or event.
3. Click **Save and Close**.

   Cancellation Notes:

   - You can cancel meetings or events you have added to a calendar.
   - When you cancel a meeting or event, you can select to remove it from the calendar or keep it on the calendar, and a **Canceled** icon () appears next to the entry.
   - When you cancel a meeting, all attendees (required and optional) receive a cancellation message.
   - Click **Cancel Meeting** or **Cancel Event** and a cancellation message appears at the top of the page. If you want to keep the canceled item, click **Undo**.
   - If a recurring item, **Cancel Meeting** or **Cancel Event** cancels all occurrences. To cancel a specific occurrence, click **Cancel Occurrence**.
   - Canceled items you selected to keep on the calendar can be removed at a later date. Click the canceled item in the calendar, click **Discard from Calendar**, and then click **Send**. Discarding a canceled item removes it from all attendees' calendars.

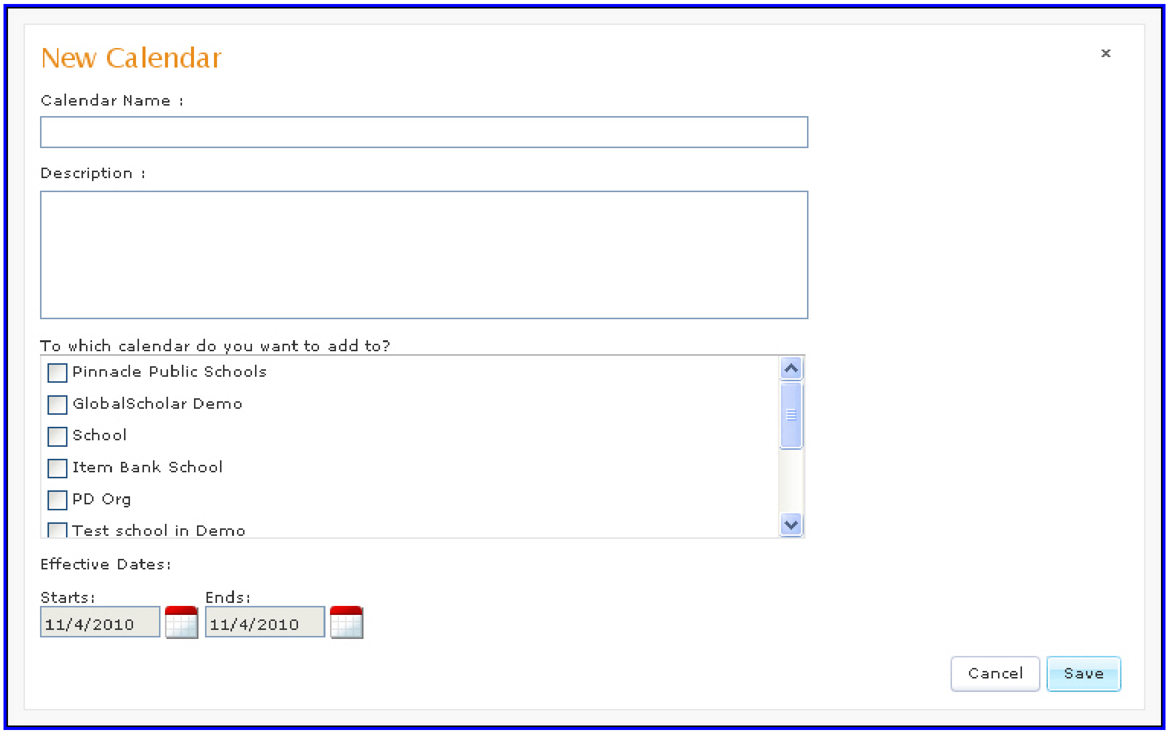
Create a Category Calendar

You can create new calendars to group related events by category, such as vacation schedules or in-service days. Administrators create category calendars at a district or school level and add events within a category. Teachers can filter the calendar to view events from selected categories.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, click **Calendar**.

   Alternatively: **Calendars** may be available from **Applications** in the top navigation bar.

4. Click **New**, and select **Calendar**.
   The **New Calendar** dialog box opens.



New Calendar page

5. Type a **Calendar Name** and **Description**.
6. Select one or more existing district or school-level categories to use the calendar.
7. Type **Starts** and **Ends** dates for the calendar, or select dates from the date picker.
8. Click **Save**.

Edit a Category Calendar

Administrators can edit any calendar categories created for district or school-level calendars.

1. Sign in with administrative rights and in the top navigation bar, click **Organizations** and select **Administer**.
2. Under **School & District Events** in the navigation pane, click the calendar that contains the category you want to edit.
3. In the main calendar area, click the **Categories** tab.
4. In the **Actions** column, click the **Edit** icon. The **Edit Calendar** dialog box opens.

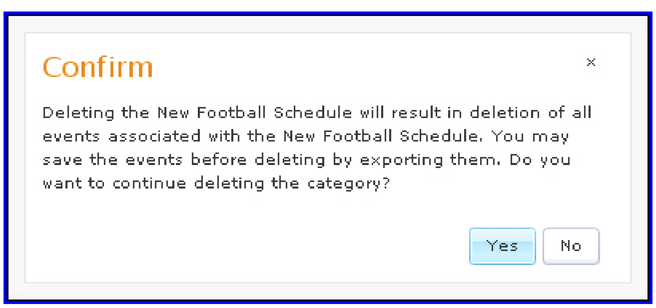
Edit Calendar page

5. Make changes as appropriate.
6. Click **Save**.

Delete a Category Calendar

Caution: Deleting a calendar category will delete any events in that category. If you want to save these events before deleting the calendar category, follow the steps in Export or Import Calendar Data

1. Complete steps 1-3 above.
2. In the **Actions** column, click the **Delete** icon. A confirmation message appears, warning you that any events in the category calendar will also be deleted.



Delete Calendar Category confirmation message

3. Click **Yes** to confirm.

Export or Import Calendar Data

IMS administrators and teachers can export events and meetings from any calendar they can view. Administrators can import events from a file to a calendar.

Exporting a calendar allows it to be viewed outside of the IMS, printed, or imported into a different calendar application. Administrators might want to export calendar data to a file so that it can be imported to a different IMS calendar.

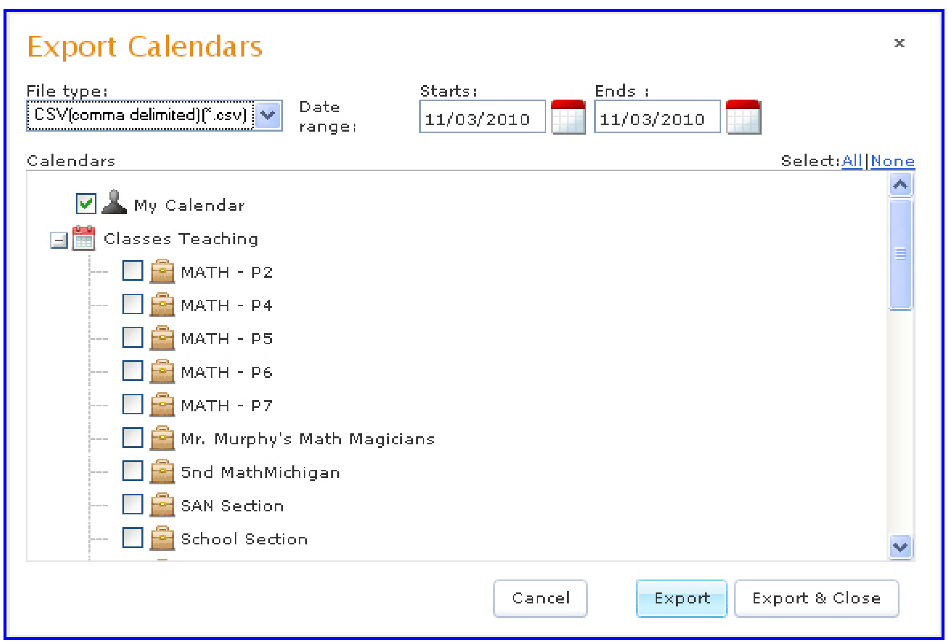
Any calendar in the IMS can be exported to a file in the following file formats:

- **CSV:** Exports calendars to a comma-separated value (.csv) file used in spreadsheets and database applications.
- **PDF:** Exports calendars to a portable document file (pdf) that can be viewed and printed in Adobe Acrobat.
- **iCalendar:** Exports calendars to an iCalendar (.ics) file that can be used to import calendar data into other calendar applications, such as Microsoft® Outlook® or Google Calendar™.

Events and meetings can be imported from a .csv or .ics files to any IMS calendar.

Export a Calendar

1. From a **Calendar**, click **Options** in the top right corner.
2. Click **Export**. The **Export Calendars** dialog box opens.



Export Calendars page

3. Select a **File Type**.

   Optional: To export calendar data for a specific date range, type **Starts** and **Ends** dates or select dates from the date pickers.

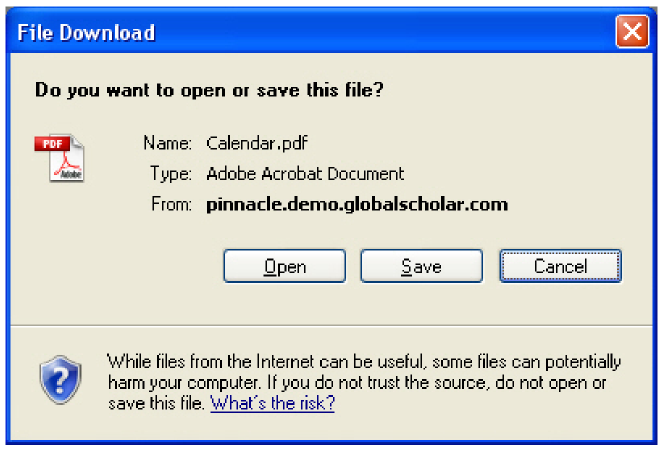
Note: If you do not specify a date range, data is exported for the current day only.

4. In the **Calendars** area, select check boxes associated with calendars you want to export. You can click the **All** or **None** links to select or clear all calendars.

Note: If you select more than one calendar to export, separate files are created for each calendar. These files are exported together in a compressed .zip file.

5. Click **Export** to export the calendar and keep the dialog box open, or click **Export & Close** to export the calendar and close the dialog box.

   A browser message prompts you to open or save the exported file. The message varies depending on the browser you use.

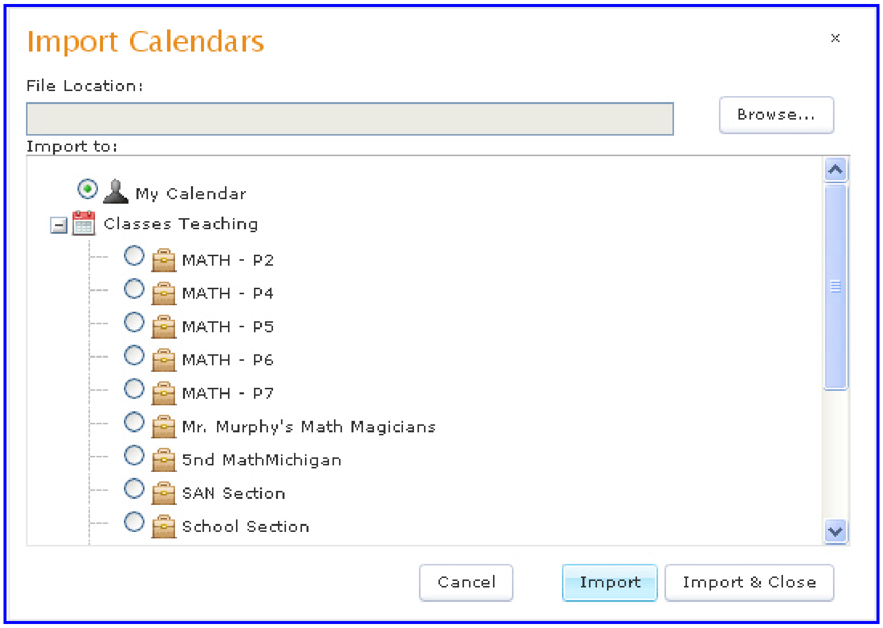


File Download browser message

6. Click **Save** and select a location.

Import a Calendar

1. In the top right corner of a calendar, click **Options**.
2. Click **Import**. The **Import Calendars** dialog box opens.



Import Calendars page

3. Type the **File Location** for the file you want to import, or click **Browse** and navigate to the file.

Note: The file must be a calendar in either .csv or .ics format.

4. In the **Import To** section, select a calendar. You can import the file to only one calendar at a time.
5. Click **Import** to import the calendar and keep the dialog open, or click **Import & Close** to import the calendar and close the dialog box. A message indicates that the events were imported successfully.

Standards

Standards Overview

The IMS supports the creation of a standards-based curriculum. The standards editor in the IMS allows IMS administrators to create, edit, correlate, import, export, and delete standards and standard entities. The standards editor can be accessed by the state/district/school administrators for their respective organizations.

> **NOTE:** RIDE has loaded most, if not all, applicable standards into the IMS for districts. If there is a set of standards that is missing please contact your district IMS administrator. As part of preparing districts for using the IMS, RIDE has also uploaded much of the curriculum districts developed in partnership with the Dana Center for ELA, Mathematics, and Science. Other subjects are the responsibility of the district to upload into the IMS. If you do not see a curriculum you need please contact your district office.

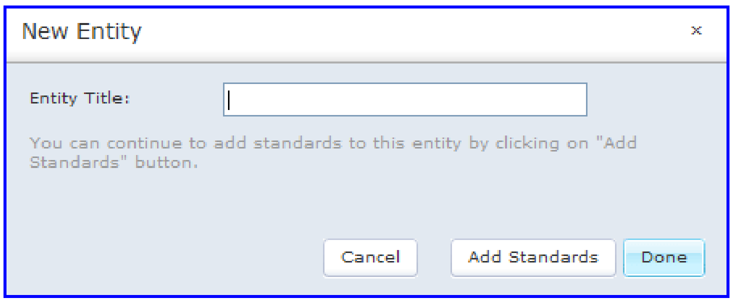
Standards Editor Tasks

- Create a Standards Entity
- Create Standards
- Import and Export Standards
- Correlate Standards
- Manage Standards

Create a Standards Entity

Before you create standards, you must create a standards entity. A standards entity is the container that holds a collection of standards. You can add standards by creating them or importing them.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Content Management** section, under **Standards**, click **Manage**.
4. On the All Standard Entities page, click **New**.
5. In the **New Entity** dialog box, type the **Entity Title**.



The New Entity dialog box

6. Click **Add Standards** to start creating standards, or click **Done** to exit and add standards at a later time.

Create a Standard

IMS administrators can add new standards to an existing standards entity or create standards for a new entity.

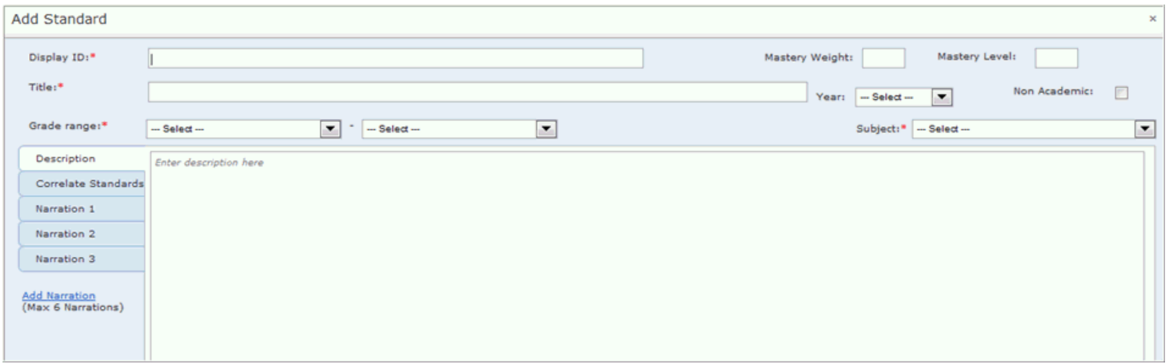
In addition, IMS administrators can edit or delete standards that they created or imported. School administrators can view standards created at higher organizations.

Manually Add Standards

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. Select an appropriate school/district from the navigation pane.
3. On the At A Glance page, in the **Content Management** section, under **Standards**, click **Manage**.
4. Click to open a standards entity. The list of standards is displayed.
5. Do one of the following:
    - To create a new standard, click **New**.

- To add a related standard or nested standard within an existing set of standards, select adjacent to the existing standard. Then select either **Insert Inside** or **Insert Below**.

The **Add Standard** window opens.



The Add Standards window

6. Provide the following information:

Note: Your school configuration may not include all items listed below.

- **Display ID**: Identifies the record in the database.
- **Mastery Weight**: Affects the grade calculation.
- **Mastery Level**: Affects the grade calculation.
- **Title**: Displays in Standards window.
- **Year**: Establishes availability by school year.
- **Non Academic**: Does not feed higher standard levels.
- **Grade Range**: Used for internal reports; does not affect availability.
- **Subject**: Used for internal reports; does not affect availability.

Optional steps:

- Type a **Description**.
- Click the **Correlate Standards** tab and select standards from other entities that correlate to your new standard. See Correlate Standards for more information.
- In the **Narration** tabs, enter up to six narratives for the standard.

7. Do one of the following:
   - Click **Save** to save the standard and close the **Add Standard** window. The Correlate page opens, and you can create additional correlations. When you have created correlations, click **Update**.
   - Click **Save and New** to save the standard and add another standard.

Import and Export Standards

Standards can be imported to and exported from the IMS. Standards must be in ABI XML format. You must have already created a standards entity. Only IMS administrators can import and export standards.

Import Standards

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district or school.
3. On the At A Glance page, in the **Content Management** section, under **Standards**, click **Manage**.
4. Select a **Standards Entity**.
5. Click **Import**.
6. In the **Import Standards** dialog box, click **Browse** and locate the appropriate file.
7. Click **Open** to add the file.
8. Click **Import**.

Export Standards

1. Sign is with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district or school.
3. On the At A Glance page, in the **Content Management** section, under **Standards**, click **Manage**.
4. Select a **Standards Entity**.
5. Click **Export**.
6. From the **Export Standards** dialog box, select the **Existing Entity**, **Subject**, and **Grade Range**.
7. Click **Export**.
8. From the **File Download** dialog box click **Open** or **Save** to work with the file.

Correlated Standards

Most organizations use multiple standards entities. For example, you may load a state entity, but tie most of your courses to a district entity. You can correlate standards from one entity with those of another and specify the correlation strength on a scale of high, medium, or low.

The procedure below allows you to correlate a standard with other standards. If you have a large number of standards to correlate, your IMS implementation engineer can import a standards correlations mapping file for you. Please contact the RIDE IMS administrators for more information.

Correlate Standards

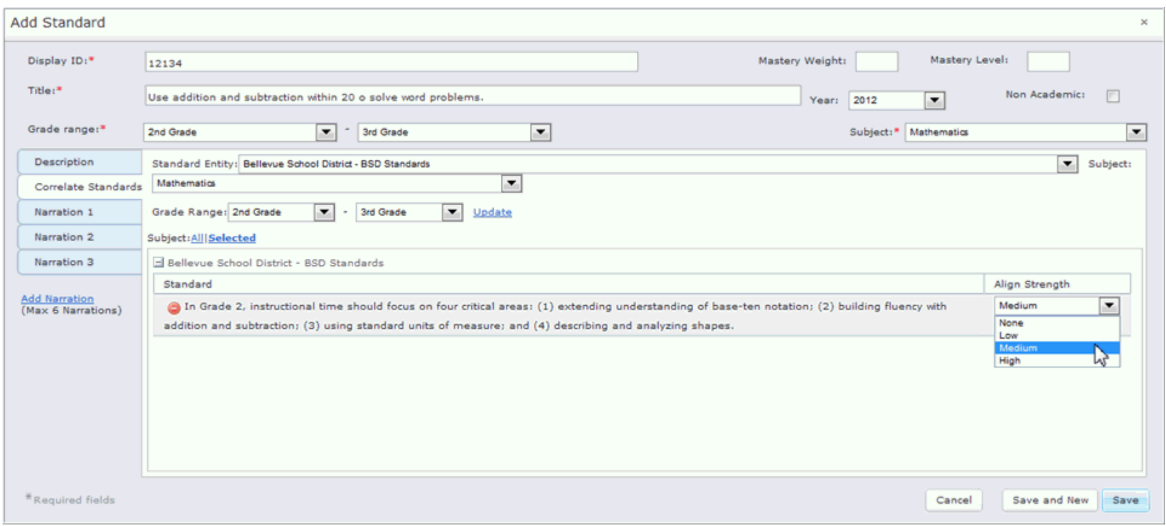
Note: To correlate standards, you must have administrator rights.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Content Management** section, under **Standards**, click **Manage**.
4. Select the appropriate standards entity. The list of standards appears.

   Optional: Use filter options at the top of the page to select an entity and identify criteria. Filter selections include the year, grade range, and subject. Click **Update** to search for related standards.

5. Locate the standard you want to correlate and, in the **Actions** column, click the **Correlate** icon . The **Edit Standard** dialog box opens with the **Correlate Standards** tab selected.

Tip: You may need to expand standards. You can edit standards only at the lower level.



The Correlate Standards tab

6. In the drop-down lists, select the **Standards Entity**, the **Subject**, and the **Grade Range** to which you want to correlate the standard.
7. Select one or more standards. For each standard you select, a strength drop-down list is displayed.
8. Select the correlation strength from the drop-down list. You can choose **Low**, **Medium** or **High**.
9. Click **Save**.

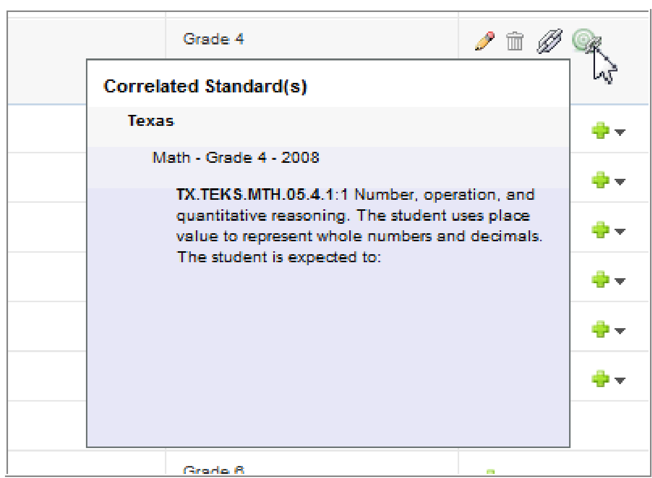
View Correlated Standards

Once standards have been correlated, you can view the correlations in several locations within the IMS. Those locations are:

- Detailed object view for all curriculum object types
- Pacing Guide view
- Add Standards page

- Individual Learning Plans
- The **Add Standards** tab in the **Create an Item** dialog box
- The Search page
- Standards Progression Report
- Assessment Reports
    - Schools Assessment Report (total by classroom)
    - Classroom Assessment Report
    - Classroom Performance Summary Report
    - Schools Assessment Report (complete)
    - District Assessment Report
    - District Assessment Report Summarized
- Custom Reports

In these locations, when a listed standard is correlated to other standards, a **Correlated Standards** icon appears after the standard. When you hover over the icon, a pop-up window displays all correlations in the system for that standard, grouped by Standard Entity, Subject, and Grade.



Correlated standards pop-up window

Search by Correlated Standards

When browsing the Community Content Library, you can filter by standards, and you have the option to include correlated standards in your search.

1. On the pagebar, click **Curriculum**.
2. Click **Create New** and select **Browse Community**. The Search Community Content page opens.
3. In the **Standards** section, click **Aligned to the Following Standards**, and then select **Include correlated standards in your search**.

> **Note**: You can select up to 20 standards.

4. Click **Browse Standards**.
5. In the **Which standards do you want to filter by** window, select relevant standards and click **Add Standards**. The selected standards appear in the **Standards** section. If any of these standards are correlated to other standards, the **Correlated Standards** icon appears next to the standard.
6. Hover over an icon to view details about the correlated standard.

Manage Standards

IMS administrators can edit and delete standards. Editing standards includes changing or adding an alignment designation.

> **Note**: You can edit the standards only for the organizations to which you have rights. For example, state IMS administrators can edit state standards, and district IMS administrators can edit district standards. District IMS administrators can view state standards but they cannot edit them.

Edit Standards

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Content Management** section, under **Standards**, click **Manage**.
4. Click to open a standards entity. The list of standards is displayed.
5. Locate a standard and, in the **Actions** column, click the **Edit** icon.

   > **Tip:** You may need to expand standards. You can edit standards only at the lower level.

6. Make appropriate changes and click **Save**.

Delete Standards

To delete a standard, follow steps 1-4 above and click the **Delete** icon adjacent to the standard. Any standards below this standard in the structure will also be deleted.

Use caution when deleting these items as they are permanently removed. If a standard is tied to a curriculum object, removing the standard can negatively affect student progress reports.

Content Templates

Content Templates Overview

Content templates allow you to specify components, preferences, and permissions for all levels of curriculum objects (units, lessons, activities, and assessments). Only IMS administrators can create or modify templates.

NOTE: Templates were created that follow the components of the Dana Center curriculum format. These should be used when uploading any curriculum developed through the Dana Center into the IMS in order to maintain consistency across multiple districts. Districts should use the following directions to create any additional templates for other curriculum.

Refer to the following topics for step-by-step instructions on creating and managing content templates:

Create a Unit Template

Create a Lesson Template

Create an Activity Template

Create an Assessment Template

Create a SCORM Template

Manage Templates

Filter Templates

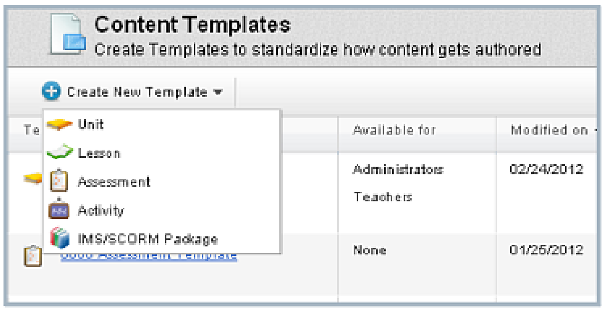
Create a Unit Template

Follow these steps to create a unit template:

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, under Content Management, click Content Templates.

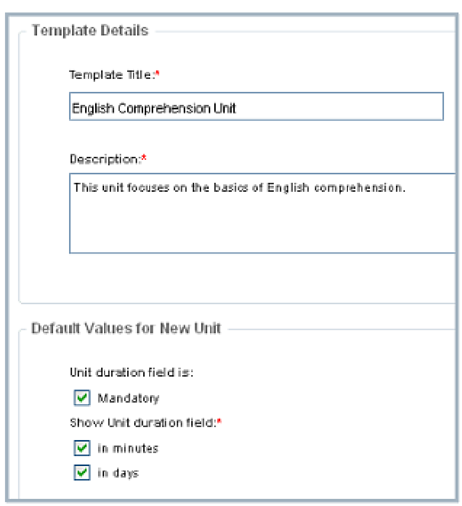
   Alternatively: On the pagebar, select **Content Templates**.

4. On the toolbar, click **Create New Template**.



Create New Template selections

5. In the drop-down list, select **Unit**.
6. On the **Details** tab, complete the following sections:
   - In the **Template Details** section, type a **Template Title**, and a **Description** of the unit template.
   - In the **Default Values for New Unit** section, select **Make duration mandatory** if you want to make the duration field required.
   - Select how you want the unit duration field to appear (**minutes** or **days**).



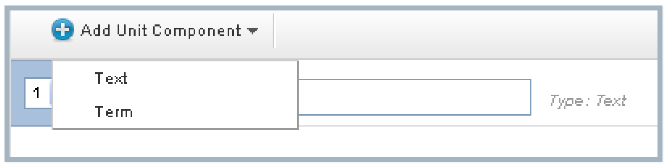
Template Details Tab

7. Click **Next** to move to the **Components** tab.

   Optional: Click **Add Unit Component** and do one of the following:

   - Select **Text** to create additional component headings.
   - Select **Term** to create a term component. Teachers and administrators who create units based on this template will be able to indicate the term in which the unit will be presented.

> **Note:** If you want to use the Pacing Guide view, the Term component is required.



Add Unit Component selections

   Optional: Click **Add/Modify Attributes** and select any Keyword Sets, Basic Attributes, or Tags to be included in the template.

8. In the **Viewable by** drop-down list for each component and attribute, select the audience.
9. If you want to ensure that the component or attribute is included with all instances of the unit, select **Mandatory**.

> **Note:** Click the **Delete** icon to remove a component.

10. Click **Next** to move to the **Preferences** tab.
11. Select appropriate **Template Preferences** and **Sharing Preferences**.
12. Click **Next** to move to the **Privileges** tab.
13. Select which **Roles** have rights to edit the template.
14. Click **Finish**. The template appears at the top of the **Content Templates** list.

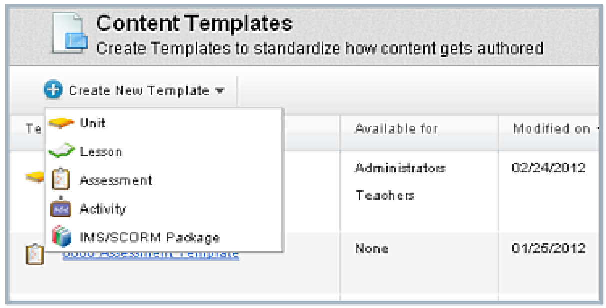
Create a Lesson Template

Follow these steps to create a lesson template:

1. Sign in with administrative rights and, on the top navigation bar, click Manage.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, under Content Management, click Content Templates.

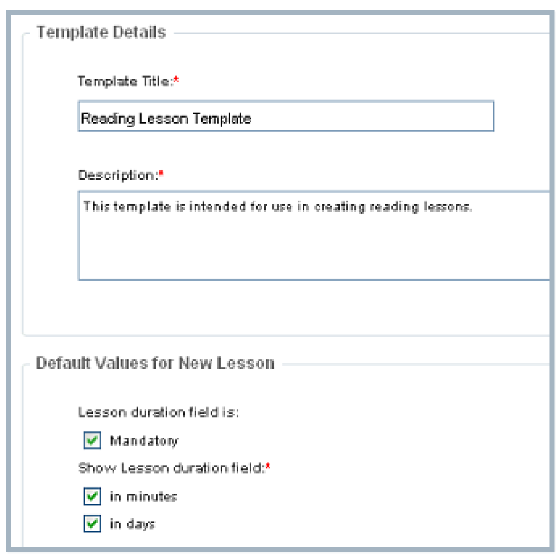
   Alternatively: On the pagebar, select **Content Templates**.

4. On the toolbar, click **Create New Template**.



Create New Template selections

5. In the drop-down list, select **Lesson**.
6. On the **Details** tab, complete the following sections:
   - In the **Template Details** section, type a **Template Title** and a **Description** of the lesson template.
   - In the **Default Values for New Lesson** section, select **Make duration mandatory** if you want to make the **Duration** field required.
   - Select how you want the lesson duration field to appear (**minutes** or **days**).



Details tab

7. Click **Next** to move to the **Components** tab.

   Optional: Click **Add Lesson Component** and create an additional lesson component.

   Optional: Click **Add/Modify** attributes and select any keyword sets, basic attributes, or tags to be included in the template.
8. In the **Viewable by** drop-down list for each component and attribute, select the audience.

Note: Click the **Delete** icon to remove a component.

9. If you want to ensure that the component or attribute is included with all instances of the lesson, select **Mandatory**.
10. Click **Next** to move to the **Preferences** tab.
11. Select appropriate **Template Preferences** and **Sharing Preferences**.
12. Click **Next** to move to the **Privileges** tab.
13. Select which **Roles** have rights to edit the template.
14. Click **Finish**.

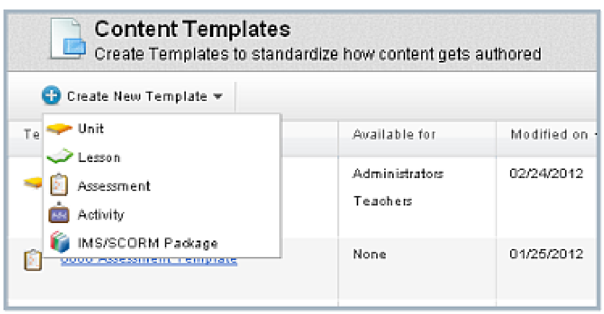
The template appears at the top of the **Content Templates** list.

Create an Activity Template

Follow these steps to create an activity template:

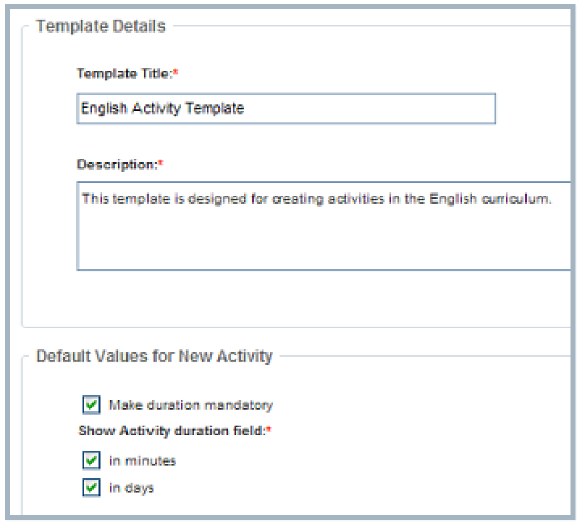
1. Sign in with administrative rights and, on the top navigation bar, click Manage.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, under Content Management, click Content Templates.

   Alternatively: On the pagebar, select **Content Templates**.
4. On the toolbar, click **Create New Template**, and, in the drop-down list, select **Activity**.



Create New Template selections

5. On the **Details** tab, complete the following sections:
   - In the **Template Details** section, type a **Template Title** and a **Description** of the activity template.
   - If you want to make the **Duration** field required, in the **Default Values for New Activity** section, select **Make duration mandatory**.
   - Select how you want the activity duration field to appear (**minutes** or **days**).

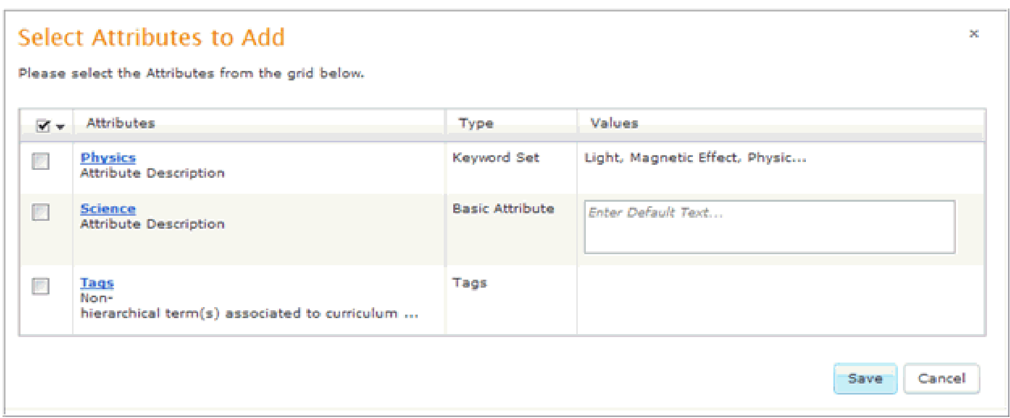


Details tab

6. Click **Next** to move to the **Components** tab.

   Optional: Click **Add Activity Component** and create an additional component heading.

   Optional: Click **Add/Modify Attributes** and select any keyword sets, basic attributes, or tags to be included in the template.



Attributes dialog box

7. In the **Viewable by** drop-down list for each component and attribute, select the audience.

> **Note:** Click the **Delete** icon to remove a component.

8. If you want to ensure that the component or attribute is included with all instances of the activity, select **Mandatory**.
9. Click **Next** to move to the **Preferences** tab.
10. Select appropriate **Template Preferences** and **Sharing Preferences**.
11. Click **Next** to move to the **Privileges** tab.
12. Select which **Roles** have rights to edit the template.

13. Click **Finish**.

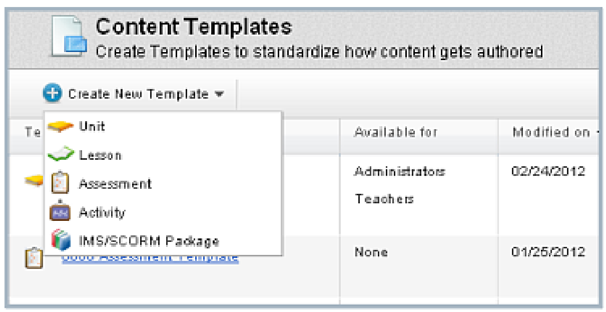
The template appears at the top of the **Content Templates** list.

Create an Assessment Template

Follow these steps to create an assessment template:

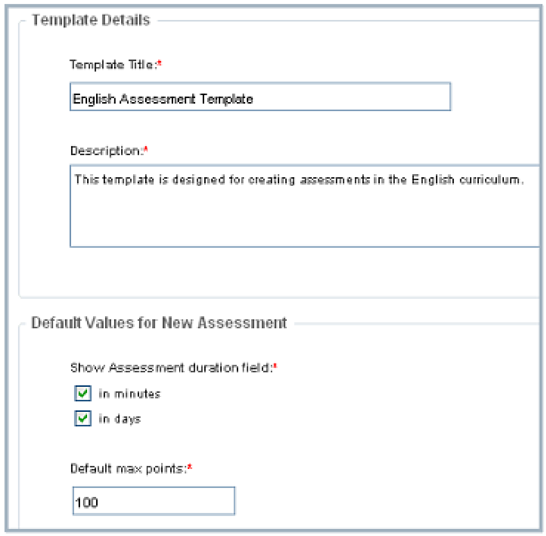
1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, scroll to **Content Management** and click **Content Templates**.

   Alternatively: On the pagebar, select **Content Templates**.
4. On the toolbar, click **Create New Template** and select **Assessment**.



Create New Template selections

5. On the **Details** tab, complete the following sections:
   - In the **Template Details** section, type a **Template Title** and a **Description** of the assessment template.
   - Select how you want the assessment duration field to appear (**minutes** or **days**).
   - Select the number of **Default max points** for the assessment.



Details tab

6. Click **Next** to move to the **Components** tab.

   Optional: Click **Add Assessment Component** and create an additional component heading.

   Optional: Click **Add/Modify** attributes and select any keyword sets, basic attributes, or tags to be included in the template.

7. In the **Viewable by** drop-down list for each component and attribute, select the audience.

> **Note:** To remove a component, click the **Delete** icon.

8. If you want to ensure that the component or attribute is included with all instances of the assessment, select **Mandatory**.
9. Click **Next** to move to the **Preferences** tab.
10. Select appropriate **Template Preferences** and **Sharing Preferences**, and click **Next.**
11. Click **Next** to move to the **Privileges** tab.
12. Select which **Roles** have rights to edit the template.
13. Click **Finish**.

The template appears at the top of the **Content Templates** list.

Create a SCORM Template

IMS administrators can create Sharable Content Object Reference Model (SCORM) templates to import content that conforms to SCORM standards and formatting.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the page bar, click **Content Templates**. The Content Templates page opens.
4. Click **Create a New Template** and select **IMS/SCORE Package**. The Create New IMS/SCORM Package Template page opens.
5. Type the template **Title** and a **Description** of the template in the appropriate fields.

6. Select whether you want the duration displayed in minutes or in days.
7. Click **Next** to move to the **Components** tab.

   Optional: Click **Add IMS/SCORM Package Component** and create an additional component heading.

   Optional: Click **Add/Modify** attributes and select any Keyword Sets, Basic Attributes, or Tags to be included in the template.

8. In the **Viewable by** drop-down list, select the audience.

> **Note:** To remove a component, click the **Delete** icon .

9. Select **Mandatory** if you want the component to be included with all instances of the assessment.
10. Click **Next** to move to the **Preferences** tab.
11. Select **Template Preferences**.

> **Note:** For SCORM templates, under **Sharing Preferences**, **Allow Sharing** is disabled.

12. Click **Next**. The **Privileges** tab opens.
13. Select the roles that you want to have access to the template for object creation.
14. Click **Finish**.

Manage Content Templates

Content template management includes the ability to edit, duplicate, or change the availability status of a template (**ON** is available, and **OFF** is not available).

Duplicate a Content Template

Duplication allows you to create a new template from an existing one. Create a copy of an existing template and then edit it. Perform this task on the Content Templates page (Admin At A Glance page > **Content Management** section > **Content Templates**).

1. On the Content Templates page, locate the template you want to duplicate.
2. In the **Actions** column, click the **Duplicate** icon . The Create New Content Template page opens.
3. Make appropriate changes and click **Finished** to save your new template.

Change Template Status

Use template status to retain templates you may need in the future, but want to restrict from current use. When status is set to **Off**, the template cannot be used to create curriculum. A status set to **On** is available for use.

Note: You can change status only for templates created at your organizational level.

Perform this task on the Content Assessment page (Admin At A Glance page > **Content Management** section > **Content Templates**).

- On the Content Templates page, locate the template you want to change and, in the **Actions** column:
  - Click **On** to change status to **Off**.
  - Click **Off** to change status to **On**.

View a Content Template

View templates on the Content Templates page (Admin At A Glance page > **Content Management** section > **Content Templates**).

- On the Content Templates page, locate the template you want to view and, in the **Template Title** column, click the link. The template attributes are displayed.

Edit a Content Template

You can edit any template you created or templates that fall within your organizational rights. If you do not see the **Edit** icon, you do not have rights to make changes.

Perform this task on the Content Templates page (Admin At A Glance page > **Content Management** section > **Content Templates**).

1. On the Content Templates page, locate the template you want to change and, in the **Actions** column, click the **Edit** icon .
2. Make appropriate changes and click **Finish**.

Template Filters

IMS administrators can filter templates by various criteria on the Content Templates page.

1. Sign in with administrative rights and on the top navigation bar, click **Manage.**
2. In the navigation pane, select an appropriate school/district.
3. On the page bar, click **Content Templates**. The Content Templates page opens.
4. On the right side of the page, click **Filter**. The filter criteria drop-down lists appear.
5. Select from the following filters:
   - **Loaded by:** Select the entity that loaded the template (for example, State or District) or select **Show All**.
   - **Modified:** Select **Before**, **Between**, or **After**, click the date picker, and select the date the template was modified.
   - **Status:** Select the status of the template (for example, **Draft**).
   - **Type:** Select the template type (for example, **Lesson**).

> **Note:** You can also select **Available for** from any of the drop-down lists, and then select the appropriate criteria to further narrow your search.

> **Note:** To remove a filter field, click the **Delete** icon.

6. Click **Update**.

Create Curriculum

Curriculum Overview

The IMS Instruction divides curriculum into five levels of instruction:

- Curriculum
- Units
- Lessons
- Activities
- Assessments

Curriculum is the general container for a specific subject and grade level, or group of subjects and/or grade levels. Within the top-level curriculum container, administrators, and teachers can create units, lessons, activities, and assessments. Only IMS administrators can create the top-level curriculum.

IMS administrators can create all levels of curriculum for distribution to classes across the school, district, or state. Teachers can create units, lessons, activities, and assessments at a class level, only for the classes they teach. Lessons, activities, and assessments reside within a unit. The lesson is an optional instructional level. You can organize activities and assessments within a lesson, or directly within a unit. Activities and assessments are optional levels as well.

Note: In this guide, the five curriculum levels (curriculum, unit, lesson, activity, and assessment) are often referred to as "curriculum objects."

Note: The IMS allows administrators at the highest organizational level to relabel units and lessons, to use terminology that conforms to state or district-preferred verbiage. Throughout this guide, these curriculum objects are referred to by their default names, units and lessons.

Standards can be added at every level of curriculum. Your state, district, and school standards can be imported into the IMS with assistance from your RIDE representative. You can select standards from any standard entity available to your school at the curriculum level. The following chart summarizes the curriculum hierarchy and prerequisites.

Curriculum level	Who can create?	Prerequisites	Notes
Curriculum	Administrator	Curriculum must be assigned to a course before teachers can view and add to it.	If you want to add standards, the standards entity must exist within the IMS.
Unit	Administrator/Teacher	Curriculum level must exist.	
Lesson	Administrator/Teacher	Unit must exist.	Lessons can be added to a unit or nested within another lesson.
Activity	Administrator/Teacher	Can create within unit or lesson.	
Assessment	Administrator/Teacher	Can create within unit or lesson.	

Pacing Guide View of Curriculum

The IMS offers an alternative view of the curriculum structure. Rather than providing a full curriculum with units, lessons, activities, and assessments, you can use the Pacing Guide view. This view presents the standards that need to be taught during each term, the suggested sequence in which the standards should be taught, and an approximate number of days or weeks to be allocated to teaching those standards. Teachers can use the Pacing Guide and create or browse to units, lessons, and other instructional materials that are aligned to the relevant standards.

> **Note:** The Pacing Guide view is an optional feature, and may not be available in your district. Also, the term “Pacing Guide” can be customized at the district level. For your organization, this view may have a different name, such as “Instructional Calendar” or “Scope and Sequence.”

> **Note:** The Pacing Guide view is based on curriculum and curriculum objects created at the district level. Any additional curriculum objects that teachers create within that curriculum are not displayed in the Pacing Guide view.

Curriculum Tasks

Refer to the following topics for step-by-step information.

- Create a Curriculum
- Assign a Curriculum to a Course
- Create a Unit
- Create a Lesson
- Create an Activity

- Create an Assessment
- Community Content Library

Create a Curriculum

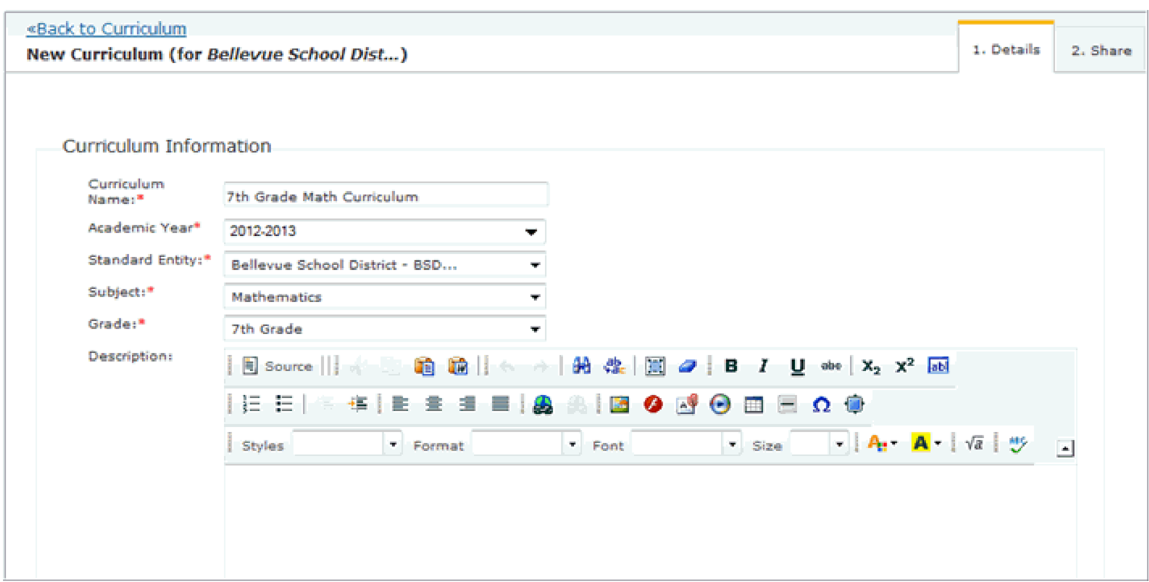
Curriculum is the highest level of instruction. It is the container for a specific subject and grade level. Only persons with administrative rights can create or edit the curriculum level. The top curriculum level must exist before any other curriculum object (units, lessons, activities, or assessments) can be created.

You create curriculum on the New Curriculum page. Once created, you must assign the curriculum to a course before teachers can see it or add other levels (units, lesson, activities, or assessments).

You can edit a curriculum, but once created, you cannot delete it.

Create a Curriculum

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the pagebar, click **Curriculum**.
4. At the top of the Curriculum Management page, click **Create New** and select **Curriculum**.



New Curriculum page

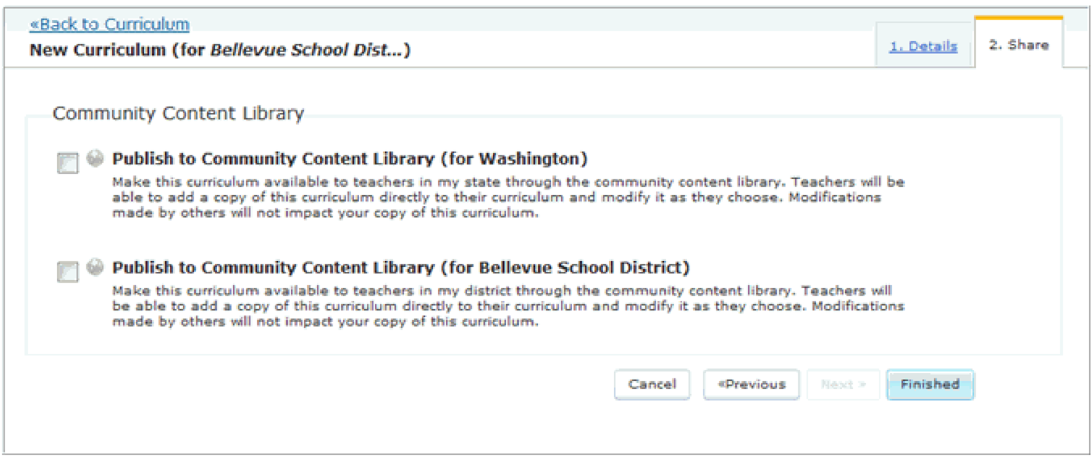
5. Type a **Curriculum Name**.
6. Select an **Academic Year**.

7. In the **Standards Entity**, **Subject,** and **Grade** drop-down lists, select the appropriate check boxes with which you want the curriculum aligned.

> **Note:** You can select multiple standard entities, subjects, and grades.

   Optional: Type a **Description**.

8. Click **Next**.
9. On the **Share** tab, select an appropriate organizational level.



Sharing Options tab

10. Click **Finished**.

> **Note:** A curriculum is not available to teachers until it has been associated with a course.

After you create a curriculum and assign it to a course, teachers can add units.

Assign a Curriculum to a Course

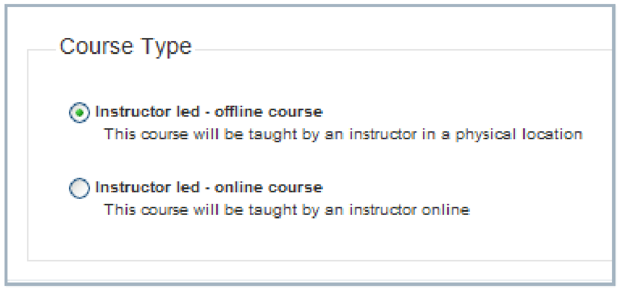
Only an IMS administrator can create the top curriculum level. Additional levels can be created by an administrator or a teacher. However, until a curriculum is associated with a course, only administrators have access to it. A single curriculum can be associated with several courses.

Only persons with administrative rights can assign curriculum to a course. Curriculum assignment follows established organizational hierarchy (state/district/school).

Assign Curriculum to a Course

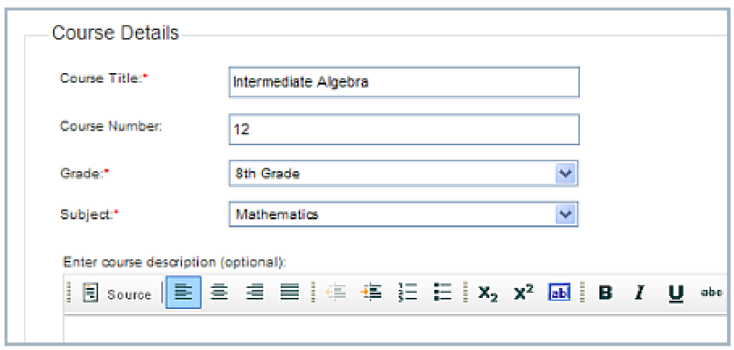
1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the pagebar, click **Courses**.
4. Locate the appropriate course and, in the **Actions** column, click the **Edit** icon .

5. Select the **Course Type**, and click **Next**.



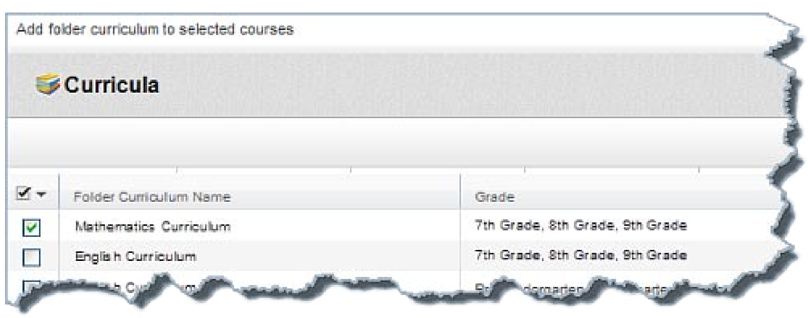
Course Type tab

6. On the **Course Details** tab, type or select appropriate information about the course, and click **Next**.



Course Details tab

7. On the **Curriculum** tab, click **Add Curriculum**.



Curricula window to add curriculum

8. Locate the appropriate curriculum and select the associated check box.

Note: More than one curriculum can be assigned to a course.

9. Click **Apply & Close**.

Alternatively: Click **Apply** to save the selection and add additional Curricula.

10. Click **Finish**.

Note: Once a curriculum is assigned to a course, teachers can view it and create additional curriculum levels for the identified course.

Create a Unit

Units are the second highest level in the IMS curriculum structure; they are created under the curriculum level. A unit is the highest curriculum level that teachers can create. The top curriculum level, which only IMS administrators can create, *must* exist before a unit can be created. Teachers can create units for their own courses and then add lessons, activities, and assessments to the units.

State or district IMS administrators can create units at the state or district level. Units created at the state or district level can be distributed to multiple courses. Only persons with state administrative rights can edit state curriculum. Only persons with district administrative rights can edit district curriculum.

You must create a unit before you can create lessons, activities, and assessments.

Create a Unit

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the At A Glance page, from **Curriculum** under **Curriculum Setup**, click **Manage**.

   Alternatively: On the pagebar, click **Curriculum**.
4. Click a curriculum title. A new window opens.
5. Click **New** and select **Unit**.
6. Select a template and click **Next**.

   Note: Before you make a template decision, you can click the template title to view the template design.
7. Complete the unit details:
   - Type a **Unit Title**.
   - In the **Duration** field, type the amount of time you expect students to work on the unit, and select **Minutes** or **Days**. The template you selected in step 6 determines whether **Duration** is a required or optional field.

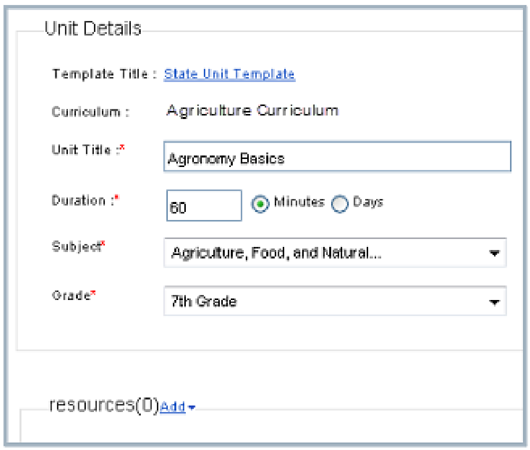
     Note: The IMS uses duration to place work on the calendar. The first unit created for a class begins with the first day of class. Each subsequent unit begins on the first calendar school day after completion of the previous unit. Duration determines the completion of a unit. Units can be reordered on the **Unit Listing** tab in the traditional curriculum view, and on the **Materials** tab in the Pacing Guide view. When reordered, duration times recalculate to place units appropriately on the calendar.

Optional: Click **Add** next to **resources** to provide a file, link, or text for additional information.

Note: You can save a unit as a draft and continue working on it at a later time. Click **Close** and select **Save**. The unit is available from the curriculum listing, or from your navigation bar **Drafts** folder.

- From the drop-down lists, select the appropriate **Subject** and **Grade** with which you want the unit aligned.

Note: You can select multiple subjects and grades.

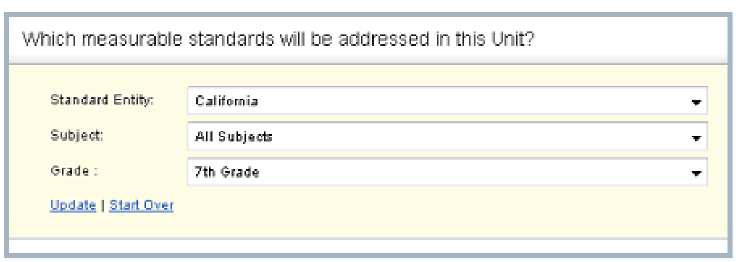


Unit Details

8. Click **Next** to display **Standards**.

   Optional: Click **Add Standards** to open a standards dialog box and select appropriate standards. Standards available are not limited to those standards added to the parent object.

Note: You can select multiple standard entities, subjects, and grades.



Measurable Standards selections drop-down lists

9. Click **Update** to apply standard selections.
10. Click **Next** to move to the **Components** tab. You can edit the details for a component or attribute as follows:

- Type within the text box to add information for each component and attribute.
- If the template allows, you can select a different audience from the **Viewable by** drop-down list.
- If the template allows, you can type over a component or attribute title to change it.
- If the template allows, click **Add Unit Component** to create additional headings.
- If there is a Term component included in the template, choose a school term from the **Select a Term** drop-down list.

> **Note:** If you are using the Curriculum Pacing Guide view, you must use a template that includes the Term component. For more information, see Curriculum Pacing Guide.

- If the template includes a keyword set attribute, select appropriate keywords.

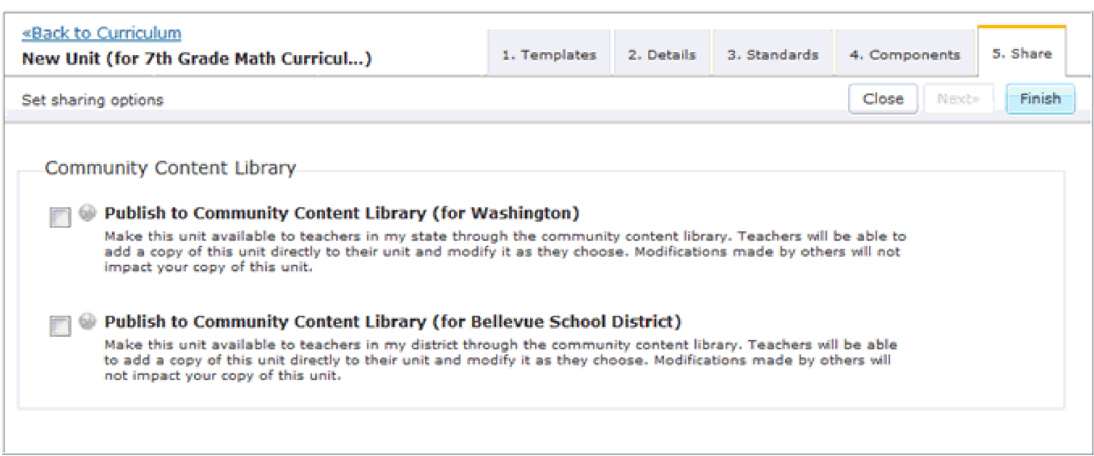
> **Note:** If keyword sets have not been added to the template, this option will not be available.

- If the template includes a tags attribute, type the appropriate tags in the box below the **Tags** heading.
- If the template allows, click the **Delete** icon to remove a component.

> **Note:** Even if the template allows you to delete components, you cannot delete tag, keyword set, or basic attributes.

Optional: To perform a spell check, click the **Check Spelling** icon in the text editor.

11. Click **Next** to display **Share** options.



Sharing Options

12. In the **Sharing Options** section, select the level at which you want to share the unit. If you have CCL Author rights, you can share with your school, or you can submit the unit for peer review. When a unit is approved by a peer review team, it is shared with the higher-level organization (for example, the district). If you do not have CCL Author rights, you have only the **Share to My Content** option. See Community Content Library for more information.
13. Click **Finish**.

Lessons

Lessons are curriculum items that serve the function of a traditional lesson plan. A lesson is created within a unit, and lessons can be nested within other lessons. The unit level *must* exist before a lesson can be created. Teachers can create lessons for their own classes and then add activities and assessments to those lessons.

State or district IMS administrators can create lessons at the state or district level. Lessons created at the state or district level can be distributed to multiple courses.

Create a Lesson

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the At A Glance page, from **Curriculum** under **Curriculum Setup**, click **Manage**.

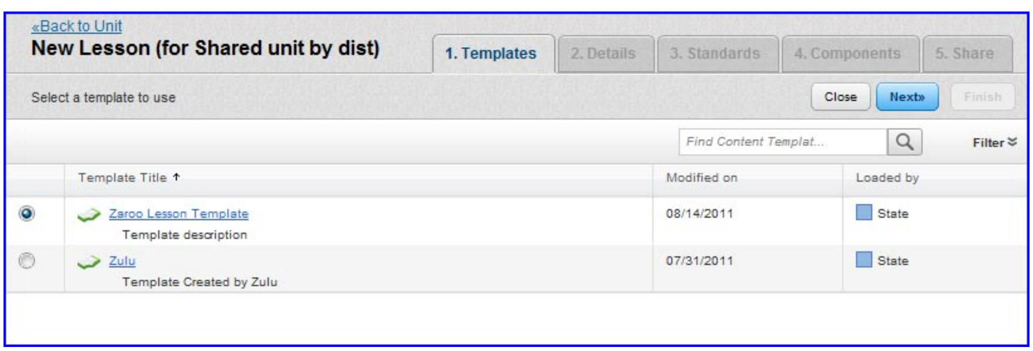
   Alternatively: On the pagebar, click **Curriculum.**

4. Click a curriculum title.
5. Expand the appropriate **Unit**.

   Alternatively: Click the **Unit Listing** tab and click a **Unit**.

6. Click **New** and select **Lesson**.
7. Select a template and click **Next**.

> **Note:** You can click the template title to view template design before you make a template decision.



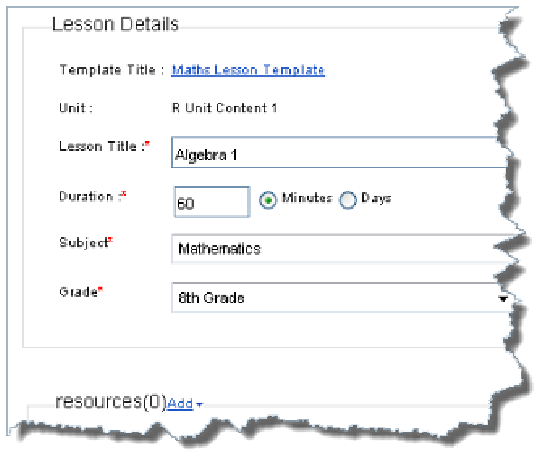
Create a Lesson

8. Complete the lesson details:
   - Type a **Lesson Title**.
   - In the **Duration** field, type the amount of time you expect students to work on the lesson, and select **Minutes** or **Days**. The template you selected in step 7 determines whether **Duration** is a required or optional field.
   - In the drop-down lists, select the appropriate **Subject** and **Grade** with which you want the lesson aligned.

Note: You can select multiple standard entities, subjects, and grades.

Optional: Click **Add** next to **resources** to provide a file, link, or text for additional information.

Note: You can save a lesson as a draft and continue working on it at a later time. Click **Close** and select **Save**. The lesson is available from the unit listing, or from your navigation bar **Drafts** folder.

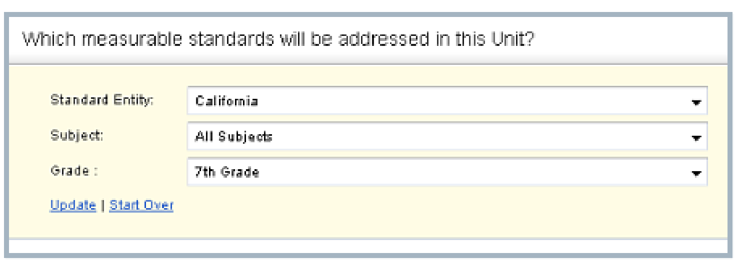


Lesson Details

9. Click **Next** to display **Standards**.

   Optional: Click **Add Standards** to open a standards dialog box and select appropriate standards. Standards available are not limited to those standards added to the parent object.

Note: You can select multiple standard entities, subjects, and grades.



Measurable Standards selections drop-down lists

10. Click **Update** to apply standard selections.
11. Click **Next** to move to the **Components** tab. You can edit the details for a component or attribute as follows:
    - Type within the text box to add information for each component and attribute.

- If the template allows, you can select a different audience from the **Viewable by** drop-down list.
- If the template allows, you can type over a component or attribute title to change it.
- If the template allows, click the **Add Lesson Component** to create additional components.
- If the template includes a keyword set attribute, select appropriate keywords.

> **Note:** If keyword sets have not been added to the template, this option will not be available.

- If the template includes a tags attribute, type the appropriate tags in the box below the **Tags** heading.
- If the template allows, click the **Delete** icon 🗑 to remove a component.

> **Note:** Even if the template allows you to delete components, you cannot delete tag, keyword set, or basic attributes.

Optional: To perform a spell check, click the **Check Spelling** icon in the text editor.

12. Click **Next** to display **Share** options.
13. In the **Sharing Options** section, select the level at which you want to share the lesson. If you have CCL Author rights, you can share with your school, or you can submit the lesson for peer review. When a lesson is approved by a peer review team, it is shared with the higher-level organization (for example, the district). If you do not have CCL Author rights, you have only the **Share to My Content** option. See Community Content Library for more information.
14. Click **Finish**.
    - In the drop-down lists, select the appropriate **Subject** and **Grade** with which you want the lesson aligned.

Activities

***NOTE:* Students do not have access to the IMS, so all references to functionality requiring students to access the IMS in this section do not apply.**

An activity in the IMS is the component of a lesson that is an interactive opportunity for students. Students do not have access to the IMS to complete activities online. However, creating activities is still a valuable component of creating effective lesson plans, and activities created in the IMS can be printed for students. Activities are created within units and within lessons. Activities are optional. Teachers can label all student work as assessments and create no activities.

Teachers create activities for classes they teach. They can copy an activity to another class they teach, and they can share an activity with other teachers through the Community Content Library. State and district IMS administrators can create activities at the state or district level and distribute to multiple classes.

When curriculum is associated with a class, teachers can schedule activities, adding them to the Lesson Plan calendar.

Create an Activity

Only persons with state or district rights to the IMS can edit state or district curriculum.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the At A Glance page, in the **Curriculum Setup** section, under **Curriculum**, click **Manage**.

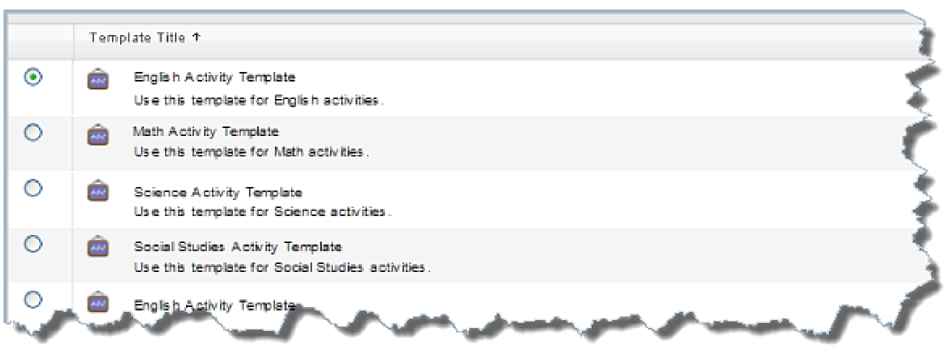
   Alternatively: On the pagebar, click **Curriculum**.

4. Click a curriculum title. A new window opens.
5. Expand an appropriate **Unit**.

   Alternatively: Click the **Unit Listing** tab and click a unit title.

   Optional: In the navigation pane, expand a lesson or, on the **Lessons/Activities** tab, select a lesson.

6. Click **New** and select **Activity**.
7. Select a template and click **Next**.



New Activity Template list

> **Note:** You can click the template title to view the template design before you make a template decision.

8. Complete the learning activity details:
   - Type an **Activity Title**.
   - In the **Duration** field, type the amount of time you expect students to work on the activity, and select **Minutes** or **Days**. The template you selected in step 7 determines whether **Duration** is a required or optional field.

     Optional: Click A**dd** next to **Resources** to provide a file, link, or text for additional information.

     > **Note:** You can save an activity as a draft and continue working on it at a later time. Click **Close** and select **Save**. The activity is available from the lessons/activities listing, or from your **Applications** > **Drafts** folder.

   - From the drop-down lists, select the appropriate **Subject** and **Grade** with which you want the activity aligned.

Note: You can select multiple subjects and grades.

9. Click **Next** to display **Standards**. Standards associated with the parent level (unit/lesson) are displayed.

   Optional: Select the appropriate standards. Click **Add Standards** to open a **Standards** dialog box, and select additional standards. Standards available are not limited to those standards added to the parent object.

Note: You can select multiple subjects, grades, and standards entities.

   Click **Update** to apply standard selections.

10. Click **Next** to move to the **Components** tab. You can edit the details for a component or attribute as follows:
    - Type within the text box to add information for each component and attribute.
    - If the template allows, you can select a different audience from the **Viewable by** drop-down list.
    - If the template allows, you can type over a component or attribute title to change it.
    - If the template allows, click the **Add Activity Component** to create additional components.
    - If the template includes a keyword set attribute, select appropriate keywords.

Note: If keyword sets have not been added to the template, this option will not be available.

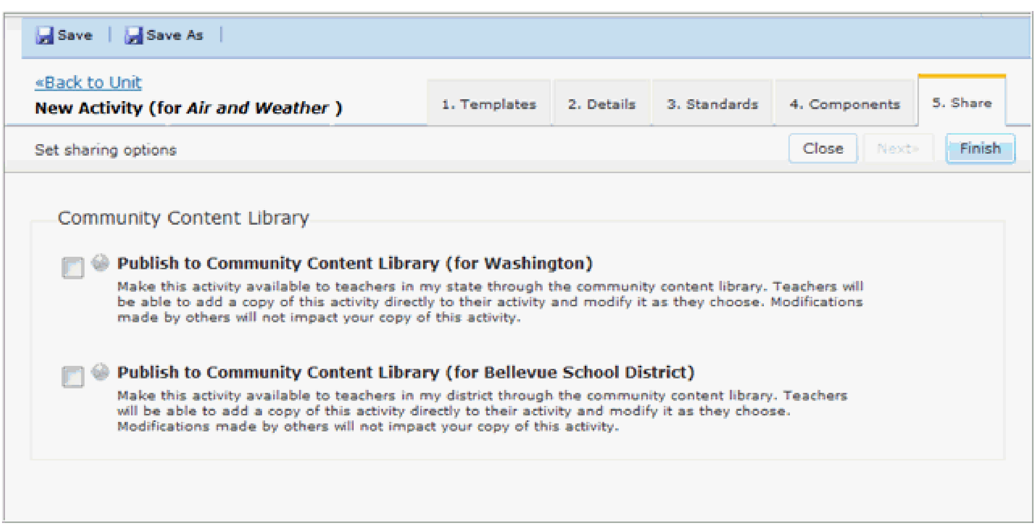
    - If the template includes a tags attribute, type the appropriate tags in the box below the **Tags** heading.

    If the template allows, click the **Delete** icon to remove a component.

Note: Even if the template allows you to delete components, you cannot delete tag, keyword set, or basic attributes.

    Optional: To perform a spell check, click the **Check Spelling** icon in the text editor.

11. Click **Next** to display **Share** options.



Learning Activity Sharing Options

12. In the **Sharing Options** section, select the level at which you want to share the activity. If you have CCL Author rights, you can share with your school, or you can submit the activity for peer review. When an activity is approved by a peer review team, it is shared with the higher-level organization (for example, the district). If you do not have CCL Author rights, you have only the **Share to My Content** option. See Community Content Library for more information.
13. Click **Finish**.
    - In the **Duration** field, type the amount of time you expect students to work on the activity, and select **Minutes** or **Days**. The template you selected in step 7 determines whether **Duration** is a required or optional field.
    - From the drop-down lists, select the appropriate **Subject** and **Grade** with which you want the activity aligned.

Create an Assessment using the IMS Assessment Tool

In the IMS, an assessment is a quiz or test designed to measure a student's understanding of a concept or subject. Assessments can be created within units and within lessons. When a curriculum is associated with a class, teachers can schedule assessments, adding them to the Lesson Plan calendar.

NOTE: This section does NOT address the functionality that will be available in the Rhode Island Interim Assessment Tool, which can be accessed from the IMS landing page. That functionality is covered in a different document. It is also important to note that students do not have access to the IMS, so assessments created in the IMS cannot be administered online. Online assessment administration is, however, available in the Rhode Island Interim Assessment Tool.

Teachers create assessments for classes they teach. They can copy an assessment to other classes they teach, and they can share an assessment with other teachers through the Community Content Library. Administrators can create assessments at the level at which they have administrative privileges (state, district, or school) and distribute to multiple classes.

The IMS supports traditionally scored assessments, for which students receive a mean score (the sum total of points for correct answers), and mastery scale scored assessments, which measure a student's mastery of one or more standards tied to the assessment. The following topic describes creating traditionally scored assessments. See Assessments with Mastery Scale Scoring for more information on how to create this type of assessments.

Before creating an assessment, a curriculum and unit *must* exist.

Create an Assessment

Only persons with state or district rights can create state or district curriculum.

1. Sign in with administrative rights and, **on** the top navigation bar, click **Manage**.
2. Select an appropriate school/district from the navigation pane.
3. On the pagebar, click **Curriculum**.
4. Click a curriculum title. A new window opens.

5. Expand an appropriate **Unit**.

   Optional: In the navigation pane, expand a lesson.

6. Click **New** and select **Assessment**.
7. Select a template and click **Next**.

> **Note:** You can click the template title to view the template design before you make a template decision.

8. Complete the assessment details:
   - Type an **Assessment Title**.
   - In the drop-down list, select an **Assessment Type**.

   > **Hint:** Place your cursor over any option in the **Assessment Type** drop-down list to display a descriptive ToolTip.

   Optional: Select **I want to attach my own question sheet** and follow the appropriate alternative steps in Create an Assessment With a Paper Question Sheet.

   - Type the **Max Points** for the assessment.
   - In the **Duration** field, type the amount of time students may work on the assessment and select **Minutes** or **Days**.

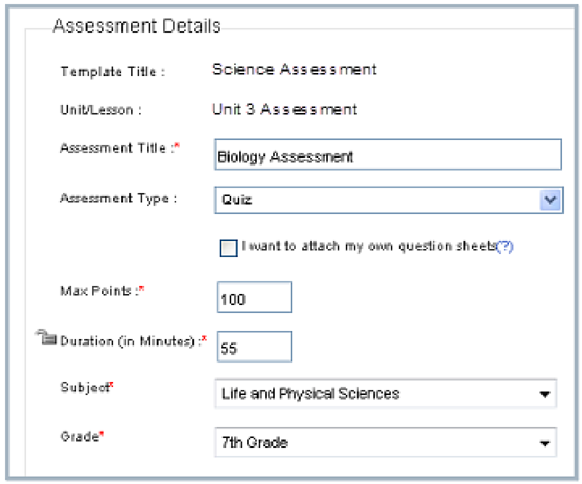
   > **Note:** Do not select **TimedTest** as the **Assessment Type**. This function is not available because students do not have access to the IMS to take assessments online.

   > **Note:** You can save an assessment as a draft and continue working on it at a later time. Click **Close** and select **Save**. The assessment is available from the curriculum listing, or from your **Applications** > **Drafts** folder.

   - Click the **Lock** icon to lock the duration entry and restrict the duration from being changed when scheduling the assessment.
   - From the drop-down lists, select the appropriate **Subject** and **Grade** with which you want the assessment aligned.

   > **Note:** You can select multiple subjects and grades.

   Optional: Click **Add** next to **resources** to provide a file, link, or text for additional information. You can also browse the resource library for additional resources available to your organization.



Assessment Details

9. Click **Next** to display the **Standards** tab. Standards associated with the parent level (unit/lesson) are displayed. Select the standards that the assessment will cover.

   Optional: Click **Add Standards** to open a **Standards** dialog box, and select additional standards. Standards available are not limited to those standards added to the parent object.

> **Note:** You can select multiple standard entities, subjects, and grades.

   Click **Update** to apply standard selections.

10. Click **Next** to move to the **Components** tab. You can edit the details of a component or attribute as follows:
    - Type within the text box to add information for each component and attribute.
    - If the template allows, you can select a different audience from the **Viewable by** drop-down list.
    - If the template allows, you can type over a component or attribute title to change it.
    - If the template allows, click **Add Assessment Component** to create additional components.
    - If the template includes a keyword set attribute, select appropriate keywords.

> **Note:** If keyword sets have not been added to the template, this option will not be available.

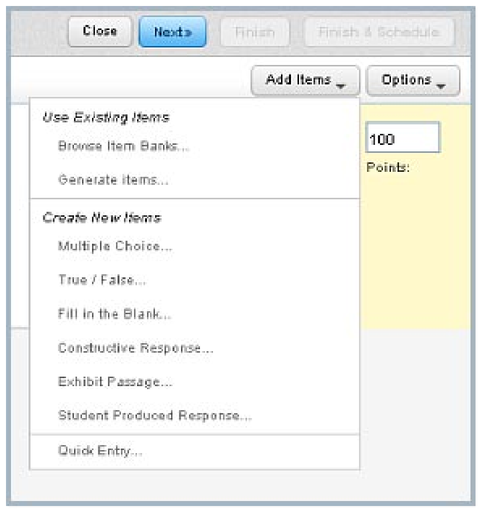
    - If the template includes a tag attribute, type the appropriate tags in the box below the **Tags** heading.
    - If the template allows, click the **Delete** icon  to remove a component.

> **Note:** Even if the template allows you to delete components, you cannot delete tag, keyword set, or basic attributes.

    - To perform a spell check, click the **Check Spelling** icon  in the text editor.

11. Click **Next** to display **Items**.
12. Click **Add Items** and select one of the following options for your first item.

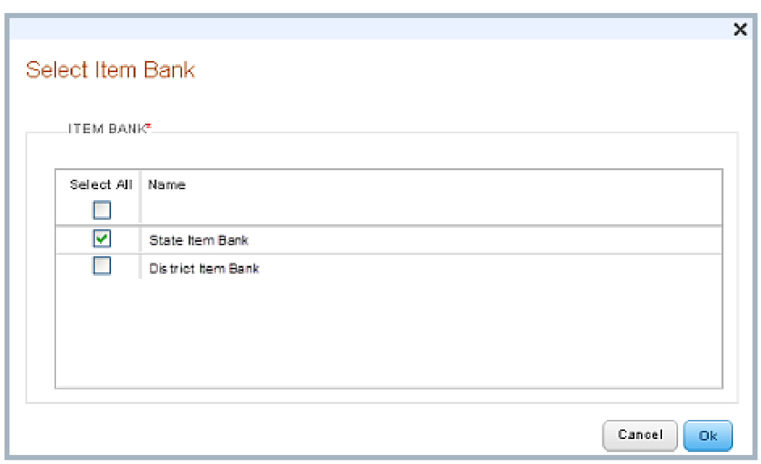
- Browse Item Banks
- Generate Items
- Create New Items
    - Multiple Choice
    - True/False
    - Fill in the Blank
    - Constructive Response
    - Exhibit Passage
    - Student Produced Response
    - Quick Entry



Create Assessment - Add Items selections

Browse Item Banks: This option allows you to view and select questions from an item bank.

a. Select an item bank and click **OK**.



Select Item Bank window

b. Locate one or more questions you want to use and click **Add to Assessment**.

c. Repeat steps (a) and (b) until you have all the questions you want to use, and then click **Next**.

> **Note:** You can filter Item Bank options by question type, grade, subject, standards, and keyword. Also, be aware that options may span several pages; see page numbers at the bottom of the window.

> **Note:** If you select an item from an item bank, and that item is later updated, the updates affect your assessment as follows: If updates are minor, they are automatically propagated to any unscheduled versions of your assessment, If updates are major, you receive notification in the **Tasks** section of your Home page, and you can accept or reject the revisions for your assessment. For more information, see Create a New Version of an Item.

Generate items: When you select this option, the IMS selects questions to add to the assessment from an Item Bank. Selections are filtered based on the standards you assigned to your assessment. You must assign standards to your assessment to use this option. Only item bank questions that match your selected assessment standards are available.

a. Type the number of each type of question you want and (optionally) select an item level.

Optional: Select **Only use items that comply with best practices**.

b. Click **Generate and Add Items**.

Create New Items: For detailed instructions on creating items of each type, refer to Create an Item: Item Types.

13. Repeat step 12 until you have created all assessment questions. A list of all the questions is displayed. You can review, edit, or delete the questions. You can also change or assign a point value to each question

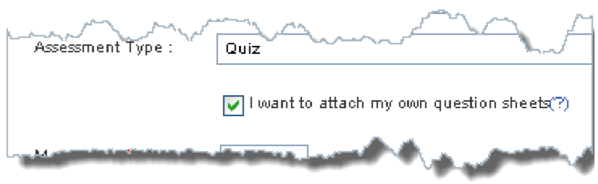
> **Note:** The sum total of points for individual questions must match the **Max Points** you assigned on the **Details** tab. Details appear in the lower left corner of the window.

14. Click **Next** to move to the **Share** tab.
15. In the **Sharing Options** section, select the level at which you want to share the assessment. If you have CCL Author rights, you can share with your school, or you can submit the assessment for peer review. When an assessment is approved by a peer review team, it is shared with the higher-level organization (for example, the district). If you do not have CCL Author rights, you have only the **Share to My Content** option. See Community Content Library for more information.
16. Click **Finish** or **Finish & Schedule**.

Create an Assessment with a Paper Question Sheet

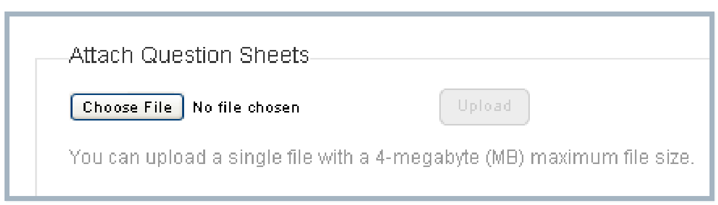
When you create an assessment, you have the option to attach a question sheet that was created outside of the IMS. You then define the question type and correct response for each question. Since students do not have access to the IMS to take assessments online, you must have students enter their responses offline. When students enter their responses on a paper response sheet, you can scan answers into The IMS to record their scores and track their progress.

1. Complete steps 1-8 from Create an Assessment.
2. On the **Assessment Details** tab, select **I want to attach my own question sheet**.



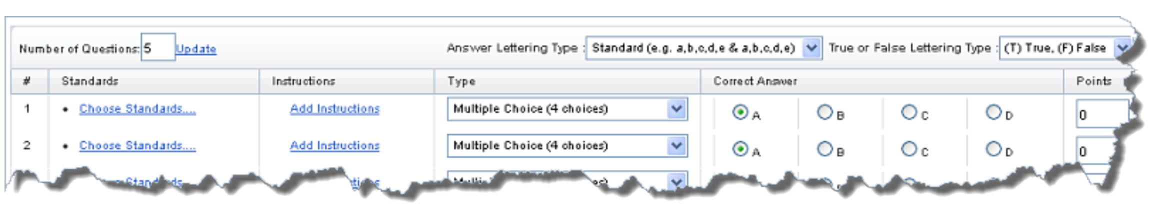
Attach question sheet selection

3. Complete steps 9-12 from Create an Assessment.
4. On the **Items** tab, click **Choose File** to locate and select the file with your questions. The file must be in .doc or .pdf format.



Option to attach question sheet

5. Click **Upload** to attach your question sheet to the assessment.
6. Type a numeral for the **Number of Questions** and click **Update**.
7. Select an **Answer Lettering Type** and a **True or False Lettering Type** from the drop-down options.



Additional information about attached question sheet

8. For each assessment question:
   a. Click **Choose Standards** to indicate specific standards associated with the question.
   b. Click **Add Instructions** to change the default instructions ("Please refer to the Question Sheet.") These instructions will appear next to the question number when the student is taking the assessment.
   c. Select the question **Type** and **Correct Answer**, and type the **Points** value.

Note: Exhibit Passage is not available for this format.

9. Click **Options** and select **Print Preview** to review the completed answer sheet. Select **Preview for: Response sheets only** or **Generic response sheets**, and print the response sheets.
10. Click **Next** and continue with steps 14--16 from Create an Assessment.

Related Topics:

Create an Assessment

Edit Assessments

Schedule Assessments

Assessments with Mastery Scale Scoring

***NOTE:* Mastery score assessments can be scheduled only as online assessments. Since students do not have access to the IMS to take assessments online, this option is not available.**

There are two types of assessment scoring options available in the IMS.

- With **traditional** or **mean** scoring, students receive a numerical score based on the sum total of points the questions are worth. Creating these types of assessments is described in Create an Assessment.
- With **mastery scale** scoring, one or more standards are tied to each question on the assessment, and students receive a **component** score of mastery, partial mastery, or non-mastery for each standard. Students also receive a mean score for the assessment.

There are two methods of mastery scale scoring:

Mastery scale without item level: With this method, each question on the assessment is linked to one or more standards. After the assessment is scored, students receive a score of mastery, partial mastery, or non-mastery for each standard.

Mastery scale with item level: This method is nearly identical to "without item level." However, each question, in addition to being linked to a standard, is also assigned one of the following mastery item levels:

- Level 1: Basic level
- Level 2: Simpler content
- Level 3: Target learning goal
- Level 4: Complex content

This allows for a more detailed breakdown of mastery to a standard. For example, a student may have mastery of a standard at level 2 (simpler content), but only partial mastery of the same standard at level 4 (complex content).

Note: Most districts choose to enable one of these methods or the other, but not both.

To create an assessment with mastery scale scoring, a teacher or administrator follows the same process as for creating mean-scored assessments (as described in Create an Assessment), with a few exceptions. Scheduling and reviewing mastery score assessments also include additional steps from the standard processes. The differences in these procedures are described in the topics below.

Create an Assessment with Mastery Scale Scoring

To create a Mastery Scored assessment, teachers and administrators follows the process in Create an Assessment, with the exceptions that follow.

Note: Mastery Scale Scoring is an optional feature and may not be available in your district.

1. In the Assessment creation wizard, on the **Details** tab:
   a. Complete the fields as usual.
   b. In the **Scoring Type** drop-down list, select **Mastery Score without Item Level** or **Mastery Score with Item Level**.

   Optional: Depending on your configuration, you may have the option to edit the Mastery Scale for assessment. See Edit the Mastery Scale when Creating Assessments.
2. On the **Standards** tab, select one or more standards to tie to the assessment. This is required for Mastery Score assessments.
3. Complete the fields on the **Components** tab, as usual.
4. On the **Items** tab:
   a. Choose the type of question to add.
   b. In the **Create an Item** window, complete the fields as usual.
   c. If you selected **Mastery Score with Item Level** on the **Details** tab, in the **Mastery Level** drop-down list, select One of the following:
      - For True/False and Multiple Choice question types, select a single mastery level.
      - For Constructive Response, Fill in the Blank, and Exhibit Passage question types, select a range of mastery levels. Later, when you manually score the assessment, based on the student's response, you choose the mastery level that you determine the student achieved for the question.
   d. Choose one or more standards to apply to the question.
5. Repeat steps 5 until you have created all questions.
6. Complete the assessment, as usual.

Edit the Mastery Scale when Creating Assessments

When creating mastery scale assessments, teachers and administrators have the option to modify the mastery scale that is applied to the assessment.

The mastery scale has default values that are set during system configuration. The default values are as follows:

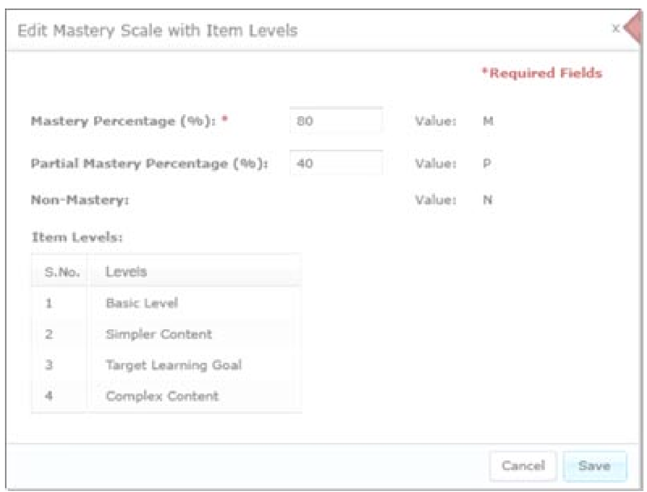
- **Mastery**: Students who receive 80% or higher are considered to have mastery of a standard.
- **Partial Mastery**: Students who receive 40% to 80% are considered to have partial mastery of a standard.
- **Non-mastery**: Students who receive below 40% are considered to have non-mastery of a standard.

When a teacher or administrator changes the mastery scale, those changes apply only to the current assessment.

Note: This is a configurable option and your school/district may opt not to enable it. If it is not enabled, it will not appear in the application.

To edit the mastery scale:

1. On the **Assessment Details** page, next to the **Scoring Type** drop-down list, click **Edit**.
2. In the **Edit Mastery Scale** window, type new values for **Mastery Percentage** and **Partial Mastery Percentage.**



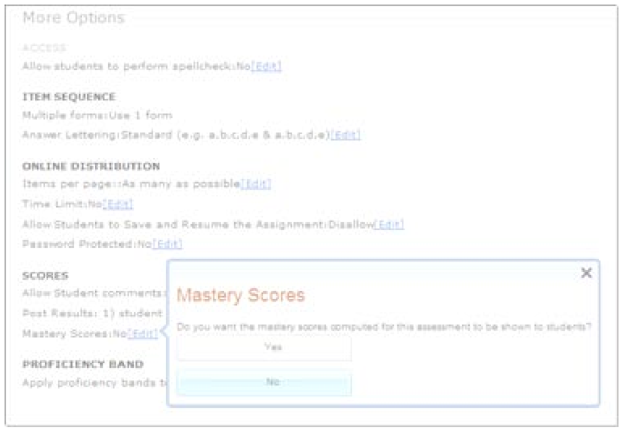
3. Click **Save**.
4. Continue creating the assessment.

Schedule an Assessment with Mastery Scale Scoring (NOT AVAILABLE)

There is an additional option on the Schedule Assessment page for assessments created using mastery scoring.

Under **More Options**, in the **Scores** section, the **Mastery Scores** option allows students to view the mastery scores they achieved for the assessment after the assessment has been scored.

- To enable students to view mastery scores, select **Yes** for this option.
- To hide mastery scores from students, select **No** for this option (this is the default).



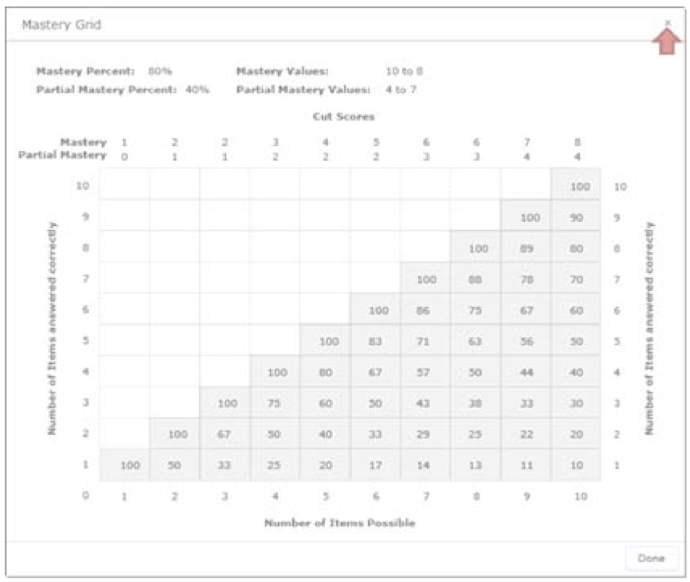
Review an Assessment with Mastery Scale Scoring

Assessment questions that require review (constructive response, fill in the blank, and exhibit passage) appear in the **Requires Review** section of the At A Glance page, as described in Review an Assessment. Reviewing mastery scale scoring items follows the same process as reviewing other non-mastery score assessments, with the following exceptions:

When you review an assessment, do the following in the Assessment **Review** tab:

1. Read and analyze the student's response.
2. In the **Points** field, assign the number of points the student earned for the answer. This is the mean score and is independent of the component score.
3. In the **Level** drop-down list, select the mastery level. When the assessment is created, the teacher/administrator selects a range of mastery levels to choose from.
4. In the **Validation** field, mark the item as either **Correct** or **Incorrect**.
5. Repeat steps 1-4 for each item that requires review.
6. Click the **Component Scores** tab.
7. The **Component Scores** tab includes the following information about the assessment:
   - **Standards**: Each standard tied to the assessment is displayed.
   - **Component Score**: For each standard, the component score is listed. This is the mastery level achieved by the student for the standard.
     - Hover over the mastery level, and the question number(s) for which the student achieved that mastery level are displayed.
   - **Levels 1 -4**: For each standard tied to assessment questions, the student’s achieved mastery scale value (Mastery, Partial mastery, Non mastery) is displayed. The four levels are (related to the Marzano 4-point scale):

    - Level 1: Basic level
    - Level 2: Simpler content
    - Level 3: Target learning goal
    - Level 4: Complex content
- **Score**: Displays the component score for each standard (this appears only for Mastery Score with Item Level). You can see the number of questions linked to a particular component score by hovering over **M**, **P**, or **N**.
- **Validation**: The column displays whether the mastery pattern for a standard is valid or not. Invalid mastery patterns may point to a problem with the assessment or with the student's response.
- **Mastery Grid link**: Opens the Mastery Grid window, which contains information about how the mastery scores are derived.



- **Level Pattern link**: Click to display level patterns that are available for this assessment. Level patterns show the valid and invalid patterns for the item levels and mastery levels. This information is read-only and is available only for "with Item Level Scoring."

Add an IMS/SCORM Package

Shareable Content Object Reference Model (SCORM) is a framework used to define and access information about learning objects. It allows these objects to be easily shared among different learning management systems.

The IMS allows you to import an existing IMS/SCORM Package and add it to a curriculum unit or lesson. Teachers can view the SCORM package from within the unit or lesson to which you have added it.

Add an IMS/SCORM Package

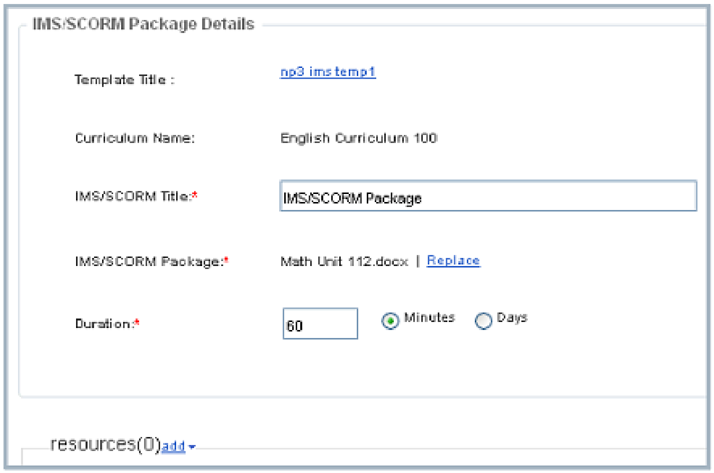
1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select a school/district.
3. On the pagebar, click **Curriculum.**
4. Click a curriculum title. A new window opens.
5. Expand a unit.

   Alternatively: Click the **Unit Listing** tab and click a unit.

6. Click **New** and select **IMS/SCORM Package**.
7. Select a template and click **Next**.

> **Note:** You can click the template title to view the template's design.

8. Type an **IMS/SCORM Title**.
9. Click **Choose File** to browse to the file containing the IMS/SCORM Package, select it, and click **Open**.



IMS/SCORM Package Details

10. Click **Upload**.

> **Note:** Uploading the file to the platform may take a few minutes.

11. In the **Duration** field, type the amount of time you expect students to work on the IMS/SCORM package, and select **Minutes** or **Days**.

    Optional: Click **Add** next to **resources** to provide a file, link, or text for additional information.

> **Note:** You can save the IMS/SCORM Package as a draft and continue working on it at a later time. Click **Close** and select **Save**. The lesson is available from the unit listing, or from your **My Drafts** folder under **Applications**.

12. Click **Next** to move to the **Components** tab. You can edit the details for a component or attribute as follows:
    - Type within the text box to add information for each component and attribute.
    - If the template allows, select a different audience from the **Viewable by** drop-down list.
    - If the template allows, type over a component or attribute title to change it.
    - If the template allows, click the **Add IMS/SCORM Component** to create additional headings.
    - If the template includes a keyword set component, select appropriate keywords.

> **Note:** If keyword sets have not been added to the template, this option will not be available.

- If the template includes a tags attribute, type the appropriate tags in the box below the **Tags** heading.
- If the template allows, click the **Delete** icon to remove a component.

> **Note:** Even if the template allows you to delete components, you cannot delete tag, keyword set, or basic attributes.

Optional: To perform a spell check, click the **Check Spelling** icon in the text editor.

13. Click **Next** to display **Share** options.
14. Select **Sharing Options**.

> **Note**: The only sharing option available for IMS/SCORM Packages is **Share to my content**.

15. Click **Finish** or **Finish & Schedule**.

Add Standards to Existing Curriculum Objects

You can add standards to an existing unit, lesson, activity, or assessment when you create the object or later, after the object has been created. You can add standards only to objects you have created. Standards available are not limited to those standards added to the parent unit or lesson. This topic describes how to add standards to existing curriculum objects.

1. On the pagebar, click **Curriculum**.
2. In the navigation pane, locate the object to which you want to add standards, and click the **Edit** icon.
3. Click **Next** twice to move to the **Standards** tab.
4. Select from the standards listed on the page. You can also click **Add Standards** to locate additional standards to align with the curriculum object.

The Add Standards page

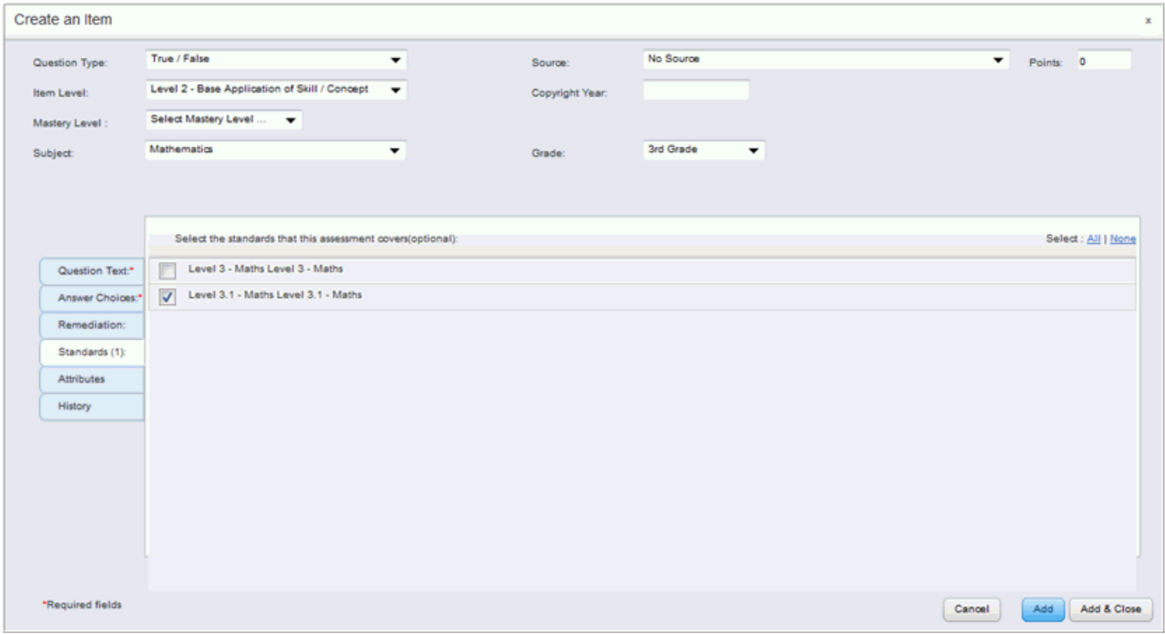
5. Complete remaining options as required and click **Save**.

Add Standards to Individual Questions on an Assessment

When you add standards to an assessment, you can link those standards to the individual questions on the assessment. This allows you to measure with more specificity how well a student is meeting or progressing towards mastery of a set of standards. You can add standards to an individual question only after you add standards to the assessment.

1. Add standards to an assessment.

2. As you add questions to the assessment, note that the **Create an Item** window includes a **Standards** tab.
3. Click the **Standards** tab and select one or more standards to link to the question.



Add Standards to an Assessment Question

Note: When a listed standard is correlated to other standards, a **Correlated Standards** icon appears after the standard. When you hover over the icon, a pop-up window displays all correlations in the system for that standard, grouped by Standard Entity, Subject, and Grade.

4. Click **Add** or **Add & Close**.
5. Repeat this process as necessary to add standards to additional questions.

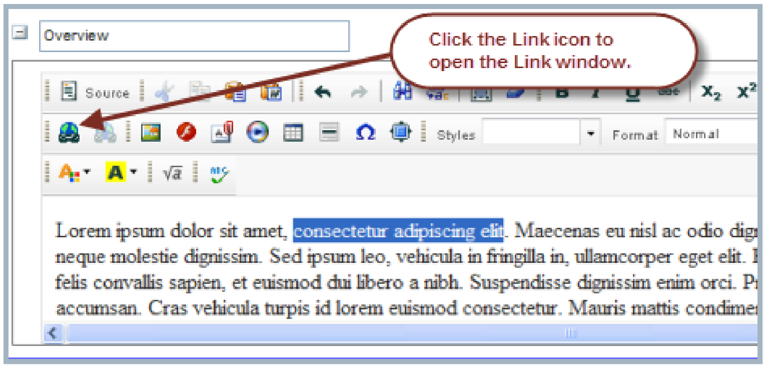
Insert a Link into a Curriculum Object

You can insert links from your curriculum objects to other learning objects by using the rich text editor in the IMS.

Inserting a Link

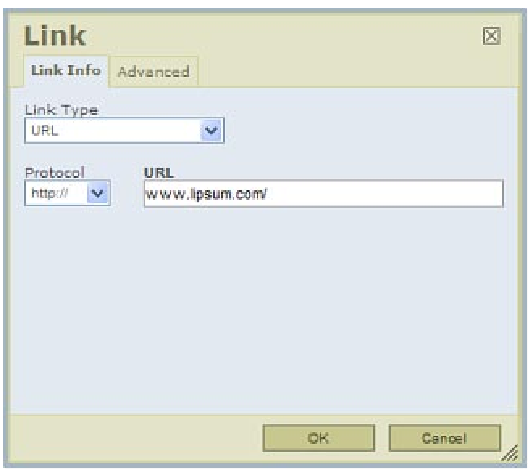
1. Follow the appropriate procedure for creating a unit, lesson, activity, or assessment.
2. Click the **Components** tab.
3. Do one of the following:
   - Compose text In the rich text editor (RTE), highlight the text where you want to add the link, and click the **Link** icon.
   - Click the **Link** icon without selecting any text.

- Paste an object or URL into the rich text editor (RTE). This results in the title of the object or the URL being inserted as the hyperlink text.



Highlighting text and link icon on the Component tab

The **Link** window opens.



Link window

4. In the drop-down list, select the **Link Type** and do one of the following:
   - **Email**: Type the email address, and optionally, the message subject and message body.
   - **Link to Learning Object**: Select the learning object you want to link to.
   - **Link to anchor in the text**: Select the appropriate anchor within the lesson text that you want to link to.
   - **URL**: Select the **Protocol**, and type the URL that you want to link to.
5. Click **OK**.

Note: To remove the link, select the linked text and click the **Unlink** icon next to the **Link** icon.

Optional: To perform a spell check, click the **Check Spelling** icon  in the text editor.

Curriculum Pacing Guide View

The IMS offers an alternative view of the curriculum structure. Rather than providing a full curriculum with units, lessons, activities, and assessments, you can use the Pacing Guide view. This view presents the standards that need to be taught during each term, the suggested sequence in which the standards should be taught, and an approximate number of days or weeks to be allocated to teaching those standards. Teachers can use the Pacing Guide and create or browse to units, lessons, and other instructional materials that are aligned to the relevant standards.

Note: The Pacing Guide view is an optional feature, and may not be available in your district. Also, the term "Pacing Guide" can be customized at the district level. For your organization, this view may have a different name, such as "Instructional Calendar".

Note: The Pacing Guide view is based on curriculum and curriculum objects created at the district level. Any additional curriculum objects that teachers create within that curriculum are not displayed in the Pacing Guide view.

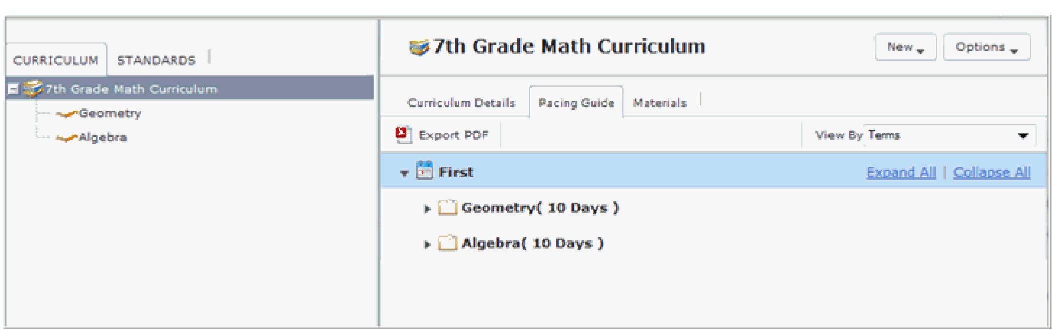
Create a Pacing Guide View of Curriculum

When administrators create a new curriculum in the IMS, a new **Academic Year** field appears on the **Details** tab. This field is mandatory, and is used by the system to create a Pacing Guide view.

In addition, the Term component must be enabled at the platform level, and the units created under the curriculum must be based on a template that includes the Term component.

Within the curriculum, administrators and teachers create units as follows:

1. In the Unit creation wizard, on the **Templates** tab, select a template that includes the **Term** component.
2. Complete the fields on the **Details** and **Standards** tabs, as usual.
3. On the **Components** tab, in the **Term** component, select the term in which the unit will be taught.
4. Complete **Sharing Options** on the **Share** tab and click **Finish**. The unit is displayed in the Pacing Guide view.



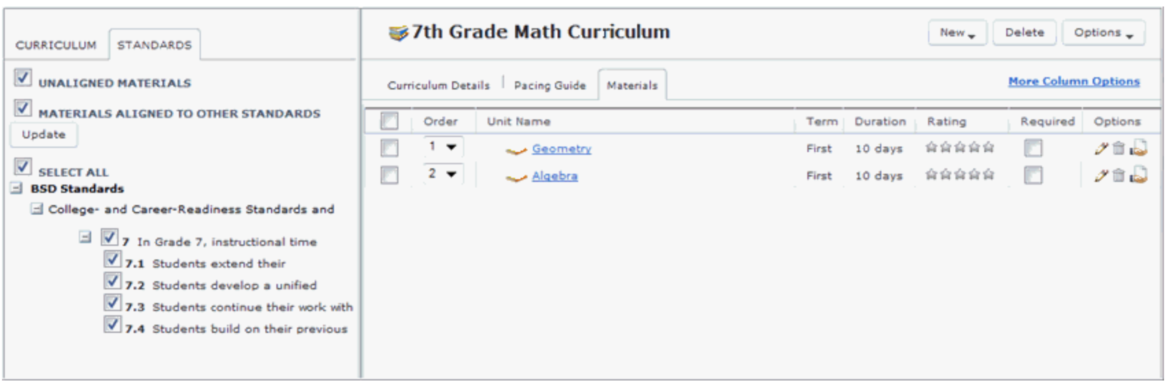
Pacing Guide View

Viewing Curriculum Materials

The **Pacing Guide** tab is visible only at the top curriculum level. There is also a **Materials** tab, which displays instructional materials (that is, lessons, activities, and assessments) that are created within a curriculum, unit, or lesson. There is no **Materials** tab for activities, assessments, or SCORM objects.

The left navigation pane contains two tabs:

- **Curriculum**: On this tab you can navigate through the hierarchy of the curriculum, to view various levels of curriculum objects. You can switch to this tab at any time.
- **Standards**: This tab opens in the navigation pane when you click the **Materials** tab in the information pane. It displays standards aligned to the curriculum objects listed in the Materials view. You can view the Standards tab only when you are in the Materials view.



Materials View

On the **Standards** tab, you can filter the standards to display any of the following:

- **Unaligned Materials**: Displays materials that are not aligned to any standards.
- **Materials aligned to other standards**: Displays materials that are aligned to standards other than those available at the parent level.
- **Individual standards**: Displays only those materials aligned to the selected standards. By default, all standards are selected. You can de-select all standards by clicking the **Select All** check box, and then select individual standards. On the **Materials** tab, materials that are aligned to the selected standard are highlighted; other materials are grayed out.

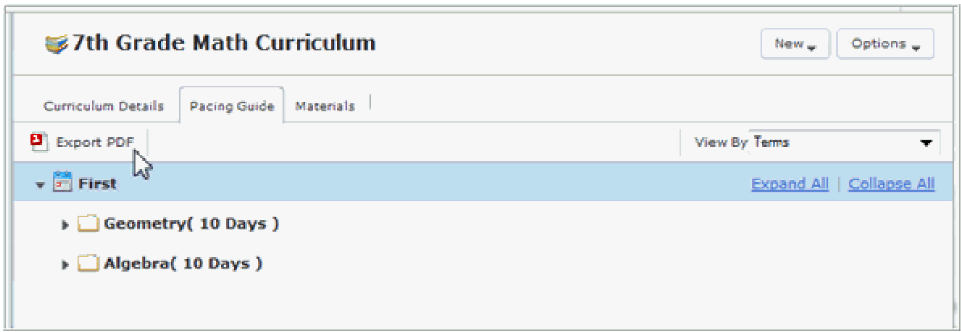
If a listed standard has been correlated to another standard, the **Correlation** icon appears next to it. You can hover over the icon and select to display the correlated standard(s).

On the **Materials** tab, you can do any of the following:

- In the **Options** column, click the **Schedule** icon to schedule an activity or assessment.
- In the **Options** column, click the **Assignments** icon to view assignment history for an activity or assessment.
- To reorder the materials on the **Material** tab, click the drop-down arrow in the **Order** column, and select a different order.

Export Pacing Guide to PDF

1. Sign is as an administrator or teacher and navigate to the top level of a curriculum with the Pacing Guide view.
2. In the **View By** drop-down list, select **Terms** or **Year**.
3. Click **Export PDF**. The PDF is created.



Curriculum Drafts

A draft is a curriculum object that you have started but not finished. Units, lessons, activities, and assessments can be saved as drafts. You cannot save a draft of the top level curriculum.

Draft items are available from either of two locations:

- On the **Unit Listing** tab or **Lessons/Activities** tab. Items appear with a red **Draft** suffix.
- The **My Drafts** folder available under **Applications** on the top navigation bar.

A draft object cannot be scheduled; however, once you complete work on a draft and click **Finished**, you can schedule it.

Save a Draft

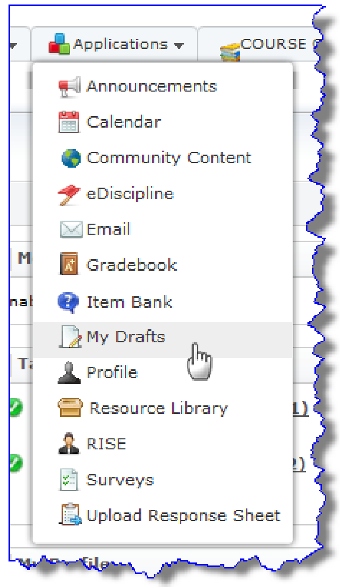
Both teachers and administrators can create a draft.

1. Create a unit, lesson, activity, or assessment. You must enter data on the **Details** tab before you can create a draft.
2. Click **Close**.
3. Click **Save As Draft**.

Open a Draft

When you are ready to complete work on an assessment, you can access the assessment from one of two locations.

- **My Drafts**
  a. On the top navigation bar, click **Applications** and select **My Drafts**.



My Drafts on the navigation bar

b. Locate your draft in the list and click the **Edit** icon .

- **Listing Tab**

a. Open the appropriate curriculum and expand to the unit or lesson level.

b. Click the **Units** or **Lessons/Activities** tab.

c. Locate your draft in the list and click the **Edit** icon .

Complete a Draft

When you complete the data for a draft, click **Finish** on the **Share** tab.

Community Content Library

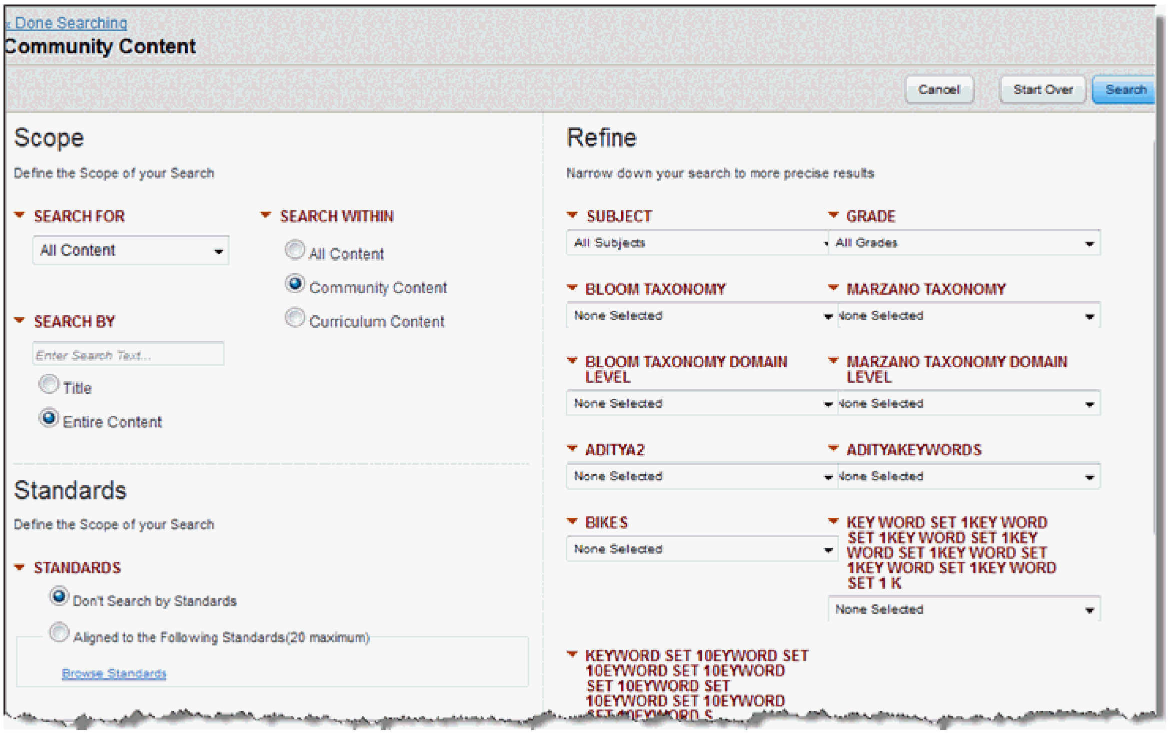
The Community Content Library (CCL) is a repository of curriculum objects (that is, units, lessons, activities, and assessments) created within an organization. When you create curriculum objects, if you have CCL Author rights, you can select to share the object. You can share with your own school, or you can submit the object for peer review. If you select to share with your own school, the object is placed in the CCL. If you select to submit for peer review, and the object is approved by the appropriate peer review team, it is made available from the CCL to all teachers in the higher-level organization (for example, the district). Objects that have been approved by a peer review team are designated as "best practices."

The Peer Review Team workflow must be configured. Your district may choose a one-step process or two-step process for review.

Objects in the CCL cannot be modified. However, you can copy an object from the library to your curriculum, and you can modify any object you add to your curriculum. The original curriculum object, stored in the library, is not affected by changes you make to your copy. You can also search the Community Content Library.

Search the Community Content Library

1. On the top navigation bar, click **Applications**, and then click **Community Content**. The Community Content Search page opens.



Community Content Search page

2. Select appropriate values in one or more of the available filters, and click **Search**. For more information on advanced search, refer to Search.

Add Curriculum Objects from the Community Content Library

1. Complete the steps in "Search the Community Content Library" to locate the appropriate curriculum object.
2. Click the link for the object that you want to add.
3. In the upper right area of the page, click **Add this <curriculum object>**.
4. Select the location where you want to add the object.

> **Note:** Click **More Choices** to view additional content.

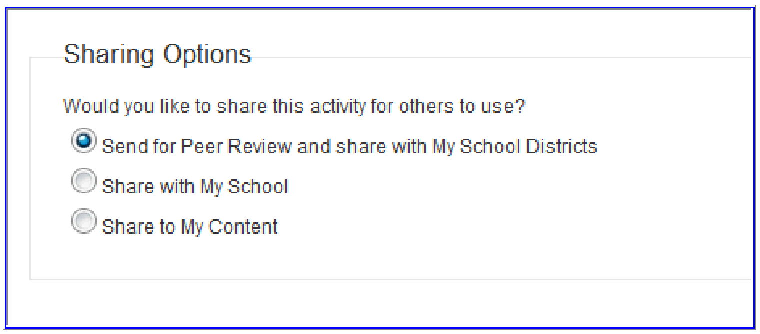
5. Click **Add**.
6. Click **OK** to confirm that you want to add the entity.

Share a Curriculum Object

If you have CCL Author rights, you can share curriculum objects during creation, or after you create them.

During Creation

1. Create a unit, lesson, activity, or assessment.
2. Complete all required creation steps (details, templates, standards, components).
3. On the **Share** tab, select an appropriate organizational level. **Community Content Library** options available on this tab vary from district to district, and depend on the template being used. Any of the following may be available:
   - Share with schools in your state.
   - Share with schools in your district.
   - Share with schools in your consortium.
   - Share with teachers in your school.
   - Share only with other classes you teach.



Share Existing

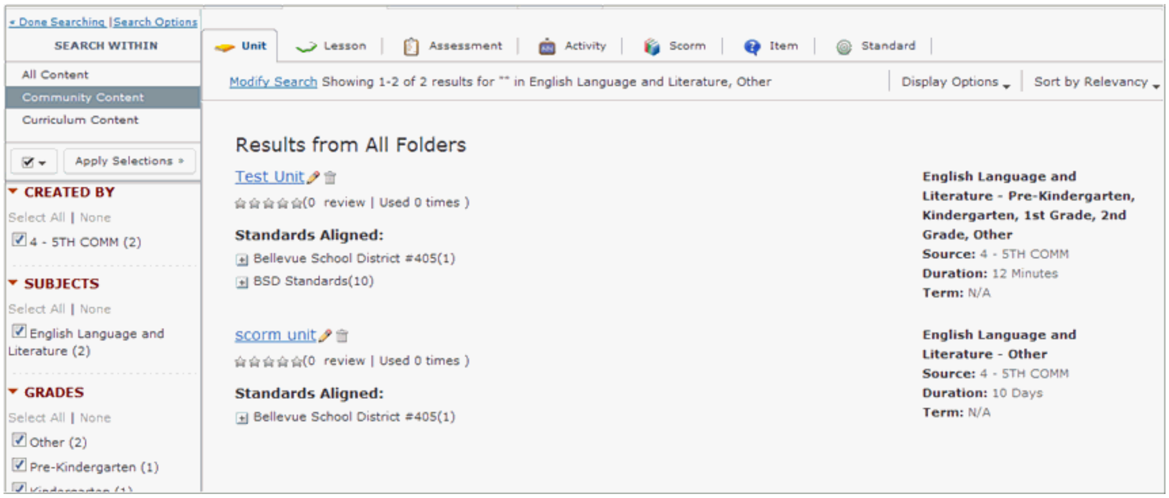
You can change share options after you create an object by using the **Edit** option (see Edit Curriculum for more information) or from the appropriate listing tab.

1. Access the appropriate listing tab:
   - **Unit**: Select a school or district, expand **Curriculum**, and click the **Unit Listing** tab.
   - **Lesson/Activity/Assessment**: Select a school or district, expand **Curriculum**, select a unit, and click the **Lessons/Activities** tab.
2. In the **Options** column, click the **Share** icon and, in the dialog box, select the appropriate sharing option.

Use Shared Objects in Your Curriculum

You can add an object from the library to your curriculum.

1. In the navigation pane, select the appropriate organization and, on the pagebar, click **Curriculum**.
2. Click **New** and select **Browse Community**. The Advanced Search page opens.
3. Select values for one or more of the available filter criteria. For more information about advanced search, refer to Search.
4. Click **Search**. Results appear in the information pane.



Community Content Library

Alternatively: Type titles in the **Search text** field to locate a specific curriculum object and click the **Search** icon.

Hint: The **Search text** field works only if you type the exact title of the curriculum object. It does not recognize wild cards or similar spellings.

5. In the results, click the title of the object you want to add.
6. In the upper right corner of the page, click **Add this <*object*>**.
7. Select the location in your curriculum to add the object and click **Add**.

Resources

Add Resources

When you create a curriculum object, you can enrich it by adding one or more resources to it. A resource can be a document, a web site, an image, or a multi-media file, such as a video. You can add resources during the curriculum creation process, or later, after you create the object. When you add a file as a resource to your curriculum, you have the option to also add it to the Resource Library. The Resource Library is a repository of media files (video, audio, and text) available for teachers and administrators within the school district. Teachers and administrators can share resources, adding to and borrowing from the library.

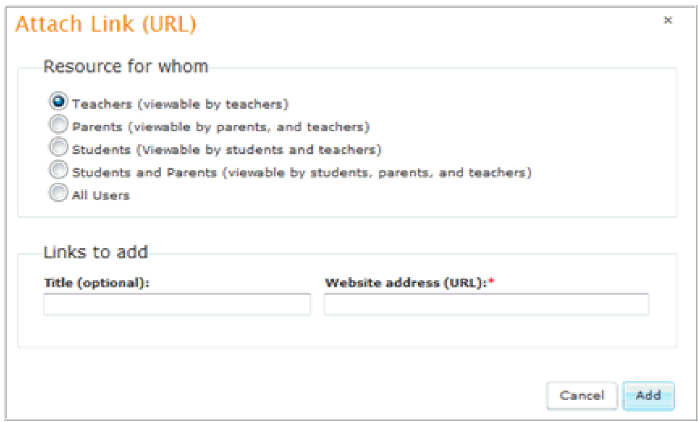
When you add a resource, you specify the audience that you want to have access to it.

Add Resources to a Curriculum Object

1. On the pagebar, click **Curriculum**.
2. Do one of the following:
   - Follow steps to begin creating a unit, lesson, activity, or assessment.

- In the navigation pane, locate the existing curriculum object to which you want to add a resource, and click **Edit**.

3. On the **Details** tab, click the **Add** link displayed to the right of **Resources**. Your ability to add resources is determined by the template used for the curriculum object.
4. Select the type of resource you want to add from the **Resource Type** drop-down.
   - **File**: Use this option to load any file that is not a web address or an image.
   - **Link (URL)**: Use this option to display a link to a website.
   - **Text**: Use this option to enter text directly into the tab.
   - **Browse Resource Library**: Use this option to select resources that have been added to the Resource Library.



The Attach Link (URL) window

5. You are given the option to select **Teachers**, **Parents**, **Students**, **Students and Parents**, or **All Users** as the audience for the resource. Parents and students do not have access to the IMS, so do not select them as the audience.
6. Type the **Resource Title**. This appears on the **Details** tab for others to see.
7. Load your resource item.
   - **File**: Click **Browse**, locate your file, and in the **Choose File** dialog box, click **Open** Then click **Upload** to add the file.
   - **URL**: Type or paste the web address in the **Resource** field.
   - **Text**: Type text in the **Resource** field and click **Add**.
   - **Browse Resource Library**: Locate the resource you want to add, click **Add,** select the **Audience**, and click **Done**.
8. Click **Add**.
9. Continue creating or editing the curriculum object.

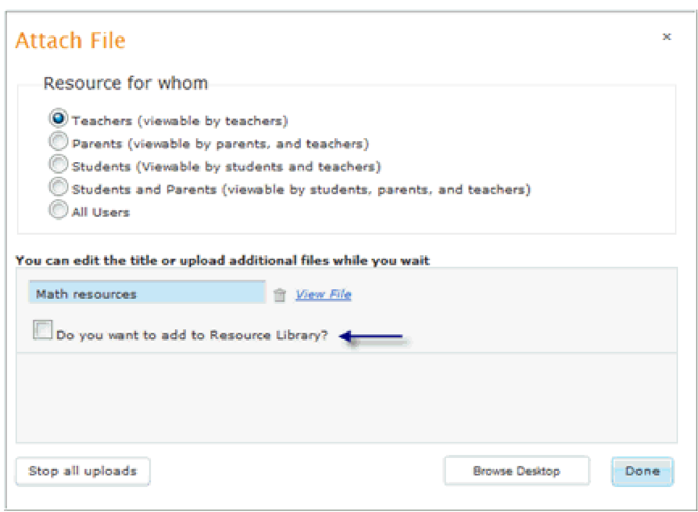
Resource Library

The Resource Library is a repository of media files (video, audio, and text files). When you add resources to curriculum objects, you may have the option to add the resources to the Resource Library. If your school's configuration includes this feature, you can also browse the Resource Library and select items to add to your curriculum. You can add a resource to the library only while you are creating the curriculum object. You can add a resource to a curriculum object from the library, either while you are creating the object or after the object exists.

Add a File to the Resource Library

1. From the **Details** tab of a new curriculum object, click **Add** next to **Resources**.
2. Select **File**. Only files can be added to the Resource Library.
3. You are given the option to select the audience. Do not choose any of the options that include parents or students, since they do not have access to the IMS.
    - **Teachers:** Can be viewed by teachers only
    - **Parents:** Can be viewed by parents and teachers only
    - **Students:** Can be viewed by students and teachers only
    - **Students and Parents:** Can be viewed by students, parents and teachers
    - **All:** Can be viewed by administrators and teachers only

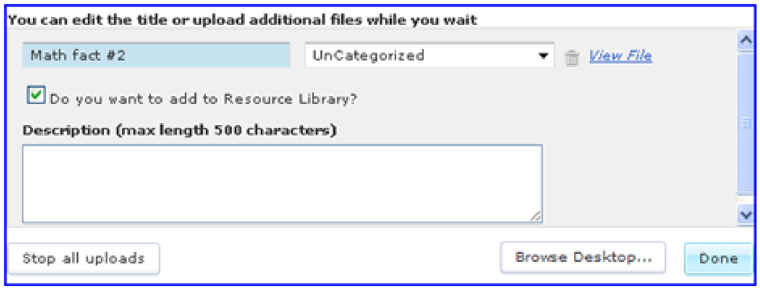
Note: Step 3 affects viewing rights for the resource within your curriculum object. It has no bearing on the viewing rights within the Resource Library.



Add resource to library

4. Click **Browse Desktop** and locate your file.
5. Click **Open**.
6. After the file loads you can:
    - Type over the file name to change the title.
    - Click **View File** to preview the file.

7. Select the **Do you want to add to Resource Library** check box.
8. Select a **Category** from the drop-down box displayed beside the resource title.
9. Type a **Description** to assist others when searching for resources.

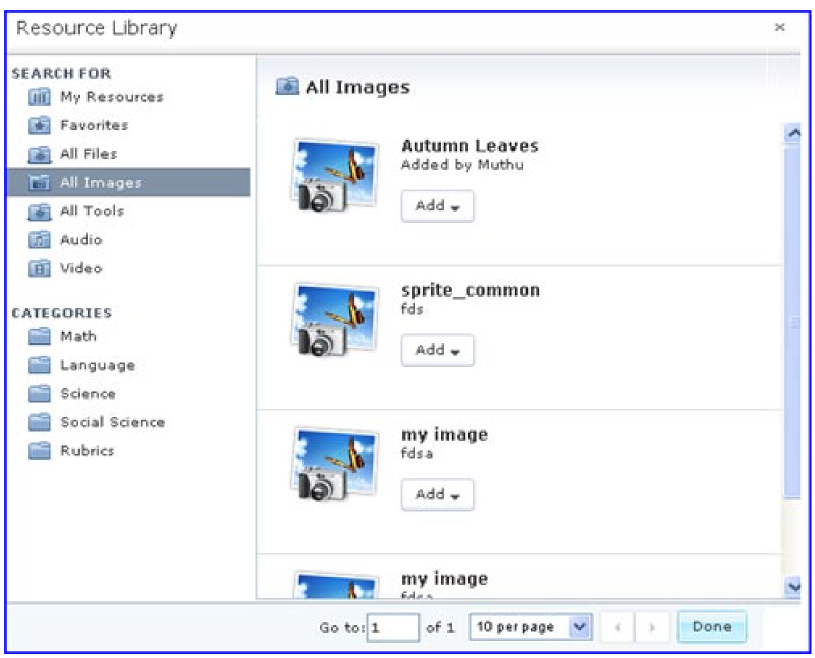


Add Resource File dialog expanded

10. Click **Done**.

Select a Resource from the Library

1. On the **Details** tab of a curriculum object, click **Add** next to **Resources**, and select **Browse Resource Library**. The **Resource Library** window displays **My Resources**.
2. Click one of the **Search For** or **Categories** options. Results appear in the right pane.



The Resource Library window

3. Locate an item from the results pane and click **Add**.
4. Select an audience.

5. Click **Done**.

Add a Resource to Favorites

1. On the top navigation bar, click **Applications** and then click **Resource Library**. A list of all resources appears.
2. Locate an appropriate resource.
3. Click the **Favorites** icon beneath the resource. The resource is added to your Favorites.
   - To remove the resource from your favorites, click the **Favorites** icon again.

Duplicate, Copy, and Move Curriculum Objects

You can save time creating curriculum with duplicate, copy, and move commands.

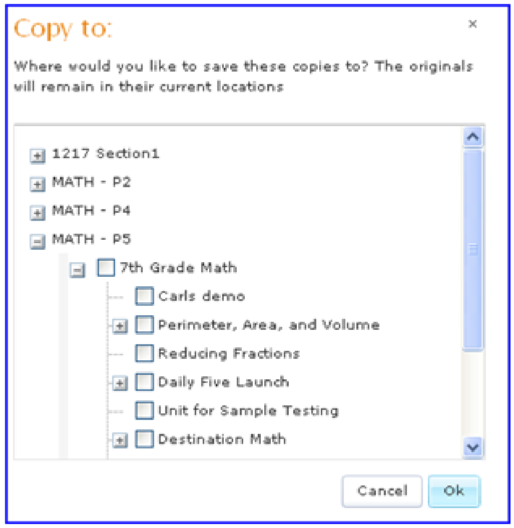
- **Duplicate**: Creates an exact copy of a curriculum object. Use this function to maintain consistency in your instructional presentation. For example, create a lesson for a chapter of a novel and then create a duplicate. Edit the lesson details and change the title in the duplicate to create lessons for a new chapter. Continue to ensure that all lessons follow a consistent flow.
- **Copy**: Creates an exact copy of the curriculum object in a new location and keeps the original object intact.
- **Move**: Removes an object from one location and places it in a new location.

These actions follow a parent/child hierarchy. For example, when you copy a unit, all lessons, activities, and assessments created within the unit are included in the copy.

You can duplicate, copy, or move any curriculum objects that were created within the organization for which you have administrative rights.

Duplicate, Copy, or Move Curriculum Objects

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate school/district.
3. On the pagebar, click **Curriculum**.
4. Click a curriculum title. A new window opens, where you can select curriculum items on the **Curriculum Details** or **Units Listing** tab.
5. Click check box(es) to select curriculum object(s).
6. In the upper right corner of the page, click **Options** and select the appropriate action. **Duplicate** and **Copy to** require you to select a location for the copy. You can select multiple locations. **Move to** requires you to select the location for the object. You can move to only one location.



Copy dialog box

Edit/Delete Assessments

Teachers can edit or delete only those curriculum objects that they have created. Administrators can edit state or district level curriculum objects in accordance with their author rights. Only administrators can edit the curriculum level. No one has general access to delete the top curriculum level from within the application. A system administrator can delete the top curriculum level through database access.

View and Edit Curriculum Objects

You can edit curriculum objects from a listing page.

Note: Hover over a link within the curriculum to view the attributes with which the entity is aligned.

1. On the pagebar, click **Curriculum** and follow a path as noted below:

   You can edit an organization's curriculum from any of the following paths:

   - **Curriculum:** Select a school or district from the navigation pane.
     (If curriculum is created at the district level, you can edit it only from the district level.)
   - **Unit:** Select a school or district, expand curriculum, and click **Unit Listing** tab.
   - **Lesson:** Select a school or district, expand curriculum, select a unit, and click **Lessons/Activities** tab.
   - **Activity:** Select a school or district, expand curriculum, select a unit, and click **Lessons/Activities** tab.
   - **Assessment:** Select a school or district, expand curriculum, select a unit, and click **Lessons/Activities** tab.

Note: If you are using the Pacing Guide view, the **Pacing Guide** tab appears instead of the **Unit Listing** tab, and the **Materials** tab appears instead of the **Lessons/Activities** tab.

2. Locate the curriculum object you want to edit and, in the **Options** column, click the **Edit** icon.

   Alternatively: From the **Lessons/Activities** tab, click an assessment or activity title and, in the upper right corner of the window, click **Edit**.

Note: If you do not see the **Edit** icon, the curriculum was created at a higher organizational level, and you do not have rights to make changes.

Delete

- Locate the curriculum item you want to delete (see "View and Edit Curriculum Objects," step 1) and, in the **Options** column, click the **Delete** icon.

Note: You can delete several curriculum objects at once from listing tabs. Select multiple check boxes (found to the left of the **Order** column) and, in the upper right corner of the window, click **Delete**.

Note: If you do not see the **Delete** icon, the curriculum was created at a higher organizational level, and you do not have rights to delete the object.

Additional Edit Access

The **Details** tab of curriculum pages provides additional editing access. For curriculum, units, and lessons, an **Edit** link appears in the upper right corner of the window. Activities and assessments display an **Edit** icon.

Click any level of curriculum in the navigation pane or on a listing page. The **Details** tab opens in edit mode.

Note: Assessments can be updated as a result of updates to an item that is used in the assessment. For more information, see Item and Assessment Versioning Process.

Edit an Assessment When You Schedule It

During the scheduling process, the **Edit Assessment** button appears in the upper right corner of the window. You can make edits to the assessment and return to the Schedule page when complete.

Write Reflections

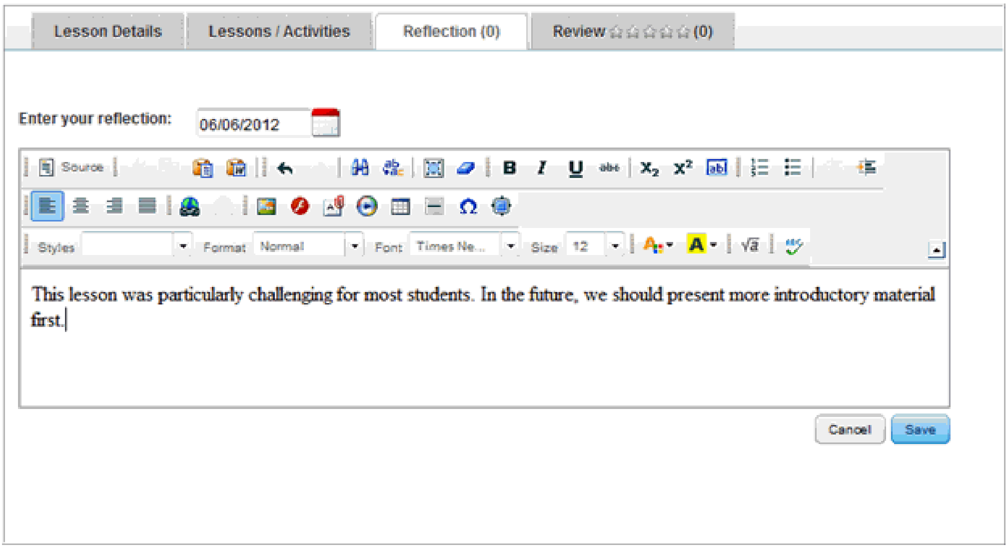
Teachers can add notes, or reflections, on a specific unit or lesson.

Write Post-Unit Reflections

1. On the top navigation bar, click **Classes** and select **Teach**.
2. In the navigation pane, select a class.
3. On the pagebar, click **Curriculum**.

4. Expand the curriculum in the navigation pane and click the appropriate unit.
5. Click the **Reflections** tab.

   Optional: Click the **Lessons/Activities** tab, select a lesson, and then click the **Reflection** tab.
6. Type comments.
7. Click **Save**.



Reflections

> **Note:** You can create as many entries as you like. Each entry is dated for the current day; however, you can change the date. You can print entries, edit them, or delete them.

Once created, you can edit, delete, or print reflections.

- To edit an entry, click the **Edit**  icon.
- To delete an entry, click the **Delete**  icon.
- To print an entry, click **Options**, select **Print Preview**, and then click **Print**.
- *Optional:* To perform a spell check, click the **Check Spelling** icon  in the text editor.

Schedule, Distribute, and Review Curriculum

After you create curriculum, you can schedule instruction and distribute assessments. You can also analyze reports to assess progress.

Refer to the following topics for step-by-step information:

- Schedule Lessons, Activities and Assessments
  - Schedule a Lesson - General
  - Schedule an Activity - General
  - Schedule an Assessment - Online
  - Schedule an Offline/Paper Assessment
  - Generic Assessment Response Sheets
  - Schedule from Planbook
  - Schedule from Learning Plan
- Scan an Assessment
- Review an Assessment
- Review an Activity
- Retract a Scheduled Activity or Assessment

Schedule Lessons, Activities, and Assessments

***NOTE:* Students do not have access to the IMS, so all references to functionality requiring students to access the IMS in this section do not apply.**

When you schedule lessons, activities, and assessments, the IMS adds them to the Planbook and At A Glance pages. Note that lessons can be viewed without being scheduled, although the option to schedule is available for teachers who prefer to track lessons.

> **Note:** Activities and assessments that have been scheduled are often referred to as "assignments."

Refer to any of the following topics for step-by-step instruction:

- Schedule a Lesson
- Schedule an Activity
- Schedule an Online Assessment
- Schedule an Offline/Paper Assessment
- Generic Assessment Response Sheets
- Administrator District-Wide Assessment
- Schedule from Planbook
- Schedule from Learning Plan

Schedule a Lesson

1. Access the **Scheduling Options** window from either of the following paths:
   - When you create the lesson, on the **Share** tab, click **Finish & Schedule**.
   - On the **Lessons/Activities** tab, in the **Options** column for the appropriate lesson, click the **Schedule** icon .

> **Note**: If you are using the Pacing Guide view, the **Materials** tab appears instead of the **Lessons/Activities** tab.

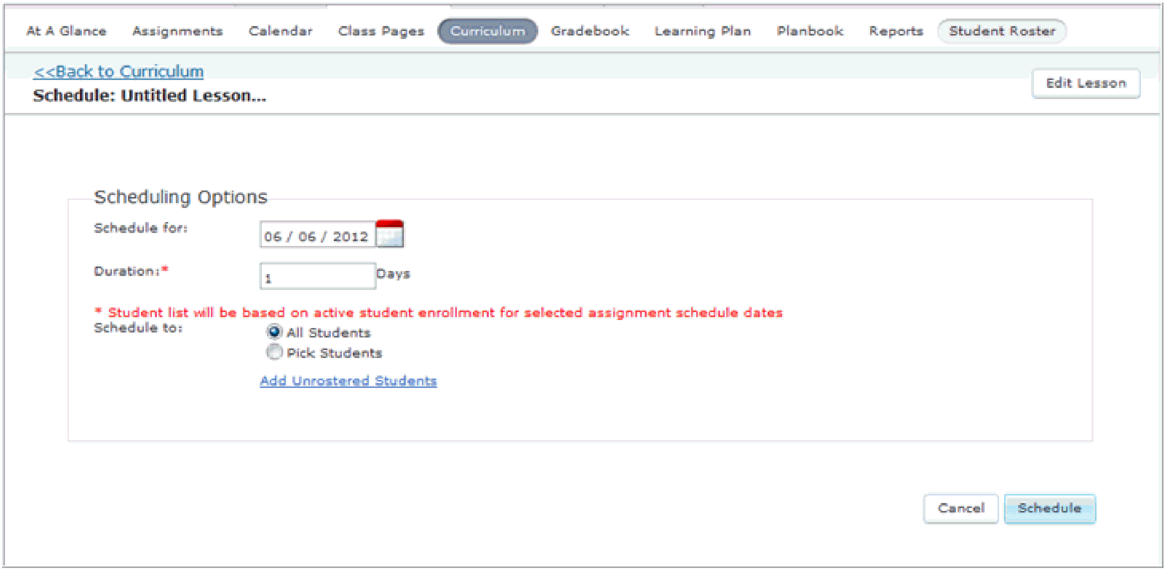
2. Select the date you want the lesson to start.

> **Note:** You specified the **Duration** when the lesson was created, but you can change the **Duration** here.

3. Select the **Schedule to** audience. You are given the option to **Pick Students** from a class roster. Students do not have access to the IMS, so this option will have no effect.

   NOTE: The IMS offers you a link to **Add Unrostered Students**. This may not be done since unrostered students cannot be entered directly into the IMS. Student rosters are loaded into the IMS from the district student information system (SIS) through the RIDE datamart. This information is updated nightly. If a student is assigned to a teacher's class but does not appear in the student roster, then the student must be added to the district SIS. If unrostered students are entered within the IMS but not the district SIS, they will be deleted each night that the information is refreshed from RIDE.

4. Click **Schedule**.



The Scheduling Options page

Schedule an Activity

NOTE: **Students do not have access to the IMS, so all references to functionality requiring students to access the IMS in this section do not apply.**

1. Access the Scheduling Options page from any of the following paths:
   - When you create the activity, on the **Share** tab, click **Finish & Schedule**.
   - On the **Lessons/Activities** tab, select the activity and click the **Schedule** icon .
   - On the **Activity Details** tab, click **Schedule**.

> **Note**: If you are using the Pacing Guide view, the **Materials** tab appears instead of the **Lessons/Activities** tab.

2. Under **Activity Options**, complete the following sections using the text editors:
   - **Instructions:** Type instructions to students for completing the assignment of the activity.
   - **Activity Type:**
     - Select **Drop Box** to allow students to upload files and explanatory text as part of their response to the assignment.
     - Select **Discussion** to allow students to post comments on the activity discussion board as part of their response to the assignment.
     - Select **No Response** if students are not required to respond to the assignment.
   - **Rubric:** Type a clearly defined set of criteria by which the activity will be assessed. Explain the scoring activity, if applicable.
   - **Grading:** Select **Allow Activity to be Graded** to indicate that the activity will be graded. If you select this, you must also type the maximum points possible for the assignment in the **Max Points** field.

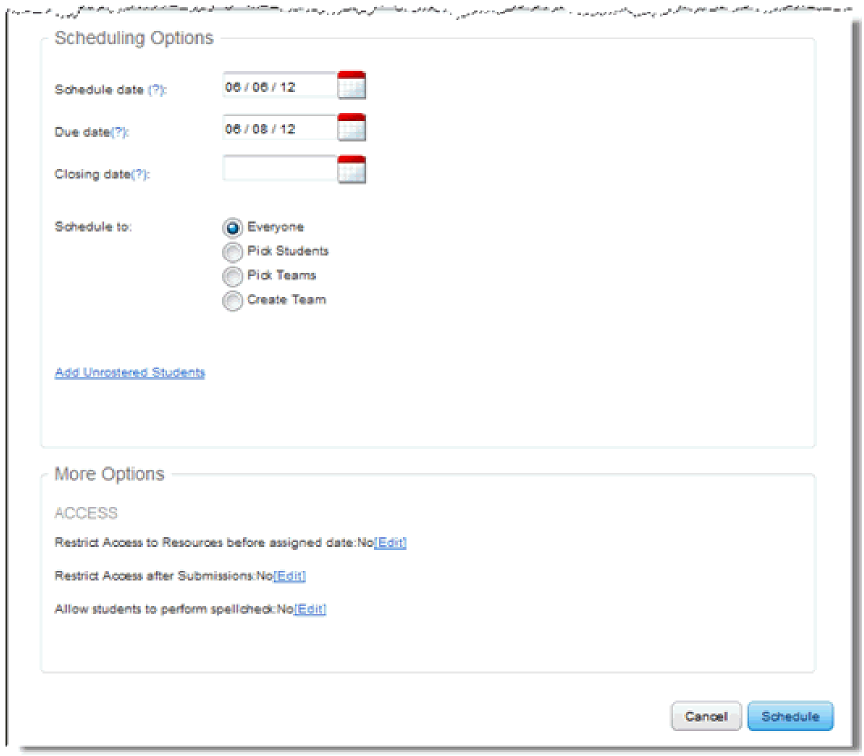
   > **Note:** If you select **No Response** for the **Activity Type**, this option is not available.

3. Select the **Schedule to** audience.
    - **Everyone**: All students enrolled in the course.
    - **Pick Students**: Displays a class roster from which you can select specific students.
    - **Pick Teams**: Displays a list of teams you created previously for the class.
    - **Create Team**: Provides a text box for a team name and displays the class roster from which you can select team members.

    Optional: Select **Enable Students Discussions** to allow students to participate in online discussions related to the activity.
4. Type or select the **Schedule date**, **Due date**, and optionally, **Closing date**.
    - **Schedule date:** The date the activity appears as available on the Planbook and At A Glance pages.
    - **Due date:** The required completion date. Submissions after this date are late. When you schedule a no-response activity, this field is not required.
    - **Closing date:** The date the activity is no longer available. No access is provided for student submissions.

> **Note:** Most teachers leave the **Closing date** blank to accommodate excused absences and make-up work.

5. You are given the following options to review. The default for all is NO. Do not edit these options. Students do not have access to the IMS, so they will have no effect.
    - **Restrict Access to Resources before assigned date**: Students cannot launch the activity until the schedule date.
    - **Restrict Access after Submission**: Students cannot view the activity after they submit their work.
    - **Allow students to perform spell check**: Students can use the spell checker in the rich text editor before submitting their work.
6. Click **Schedule**.



Schedule Activity page

Schedule an Online Assessment

NOTE: Students have no access to the IMS, so online assessment options (not including those scheduled through the RI Interim Assessment Module) are not available.

1. Access the **Scheduling Options** window from any of the following paths:
   - When you create the assessment, on the **Share** tab, click **Finish & Schedule**.
   - On the **Lessons/Activities** tab, select the assessment and, in the **Options** column, click the **Schedule** icon .
   - On the **Assessment Details** tab, in the upper right corner of the window, click **Schedule**.
2. For distribution method, select **Online**.

   Optional: The **Assignment name** field displays the assessment title. You can change it for this assignment.
3. Type or select the **Schedule date**, **Due date**, and optionally, **Closing date**.
   - **Schedule date:** The date the assessment appears as available on the Planbook and At A Glance pages.
   - **Due date:** The required completion date. Submissions after this date are late.
   - **Closing date:** The date the assessment is no longer available. No access is provided for student submissions.

> **Note:** Most teachers leave **Closing date** blank to accommodate excused absences and make-up work.

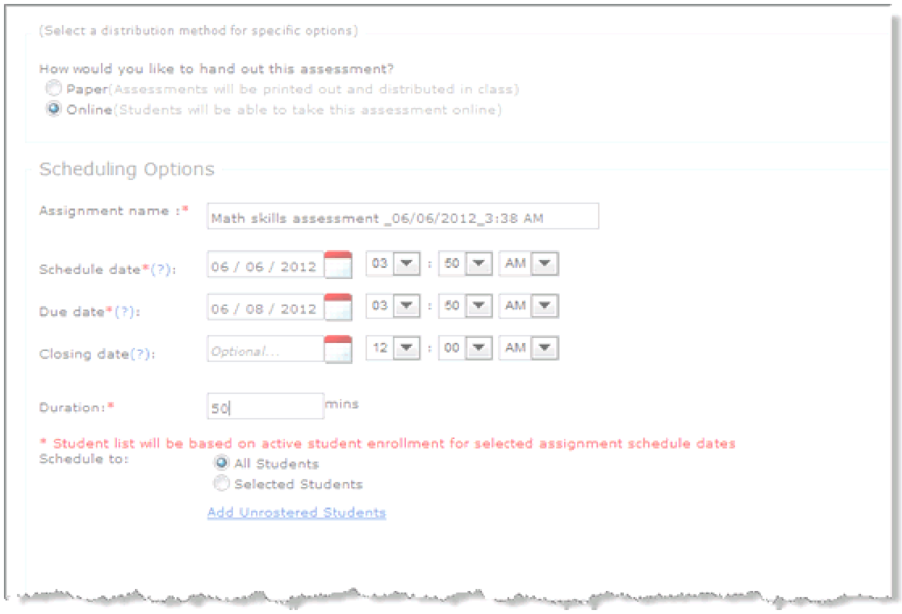
4. Type a **Duration**. This is the amount of time you allow for students to take the assessment.
5. Select the **Schedule to** audience.
    - **All Students:** All students enrolled in the course.
    - **Selected Students:** Displays a class roster from which you can select specific students.
    - **Add Unrostered Students:** Opens a dialog box that allows you to search for unrostered students.
6. Review and change the following options:
    - **Scoring Options**
      Penalties: Yes counts negative points for wrong answers for multiple choice and True/False questions.
    - **Access**

      Allow students to perform spellcheck: If you select **Yes**, students will have access to the spell-checker in the rich-text editor, and they can check the spelling on their responses before submitting them.

    - **Item Sequence**
      Answer Lettering: Select **Standard** if answer options should restart with "a" for each new question, or **Consecutive** if answer options should run consecutively from one question to the next.
    - **Online Distribution**
        - **Items per page:** Select to include as many questions as possible per page, or to have each question to appear in a new window.
        - **Time Limit:** If you select **Yes**, the **Duration** becomes a time limit for the assessment.
        - **Allow Students to Save:** If you allow, students can save the assessment and return at a later time to complete it; disallow, and students must complete the assessment in one session.
        - **Password Protected:** If you select **Yes**, you can enter a password of your choice, or have one randomly assigned. Students will not be able to launch the assessment without the password.
    - **Scores**
        - **Allow Student comments:** If you select **Yes**, a comment link appears with each question. Students may click it to type comments for any or all questions on the assessment. Comments are recorded with the assessment and available for the teacher and the student to see.
        - **Post Results:** Select from a list of options to display for the student once the student submits an assessment.
        - **Mastery Scores**: Select **Yes** to allow students to view the mastery scores they received after the assessment is scored. Select **No** to hide the mastery scores from students.

      Note: This option is available only if Mastery Score Assessments has been enabled for your district.

    - **Proficiency Band**
      Apply to assignment: If you select **Yes**, you can define proficiency bands, and the student score is displayed within the band upon submission.
7. Click **Preview** to view the assessment as the student will see it.
8. Click **Schedule**.



Schedule Online page

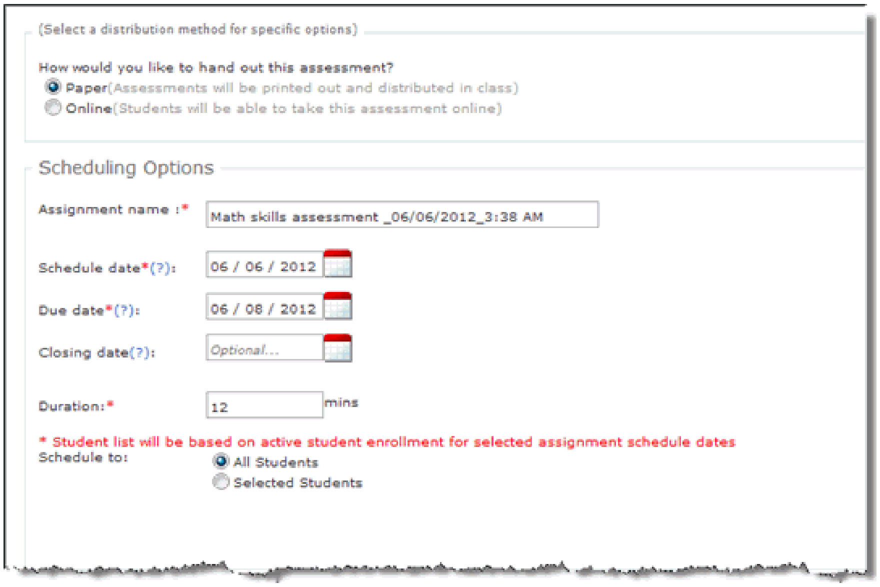
Schedule an Offline/Paper Assessment

You can create a paper version of an assessment with response sheets that you scan to populate scores in the IMS. For offline (paper) assessments, you can print response sheets for each student with the student's ID, the class ID, and the assessment ID imprinted as part of the bar code in each sheet. Alternatively, you can create generic assessment response sheets on which students fill in the bubbles to indicate their student IDs. The class ID and assessment ID will still be imprinted in the bar code of each sheet.

1. Access the **Scheduling Options** window from any of the following paths:
   - When you create the assessment, click **Finish & Schedule** on the **Share** tab.
   - On the **Lessons/Activities** tab, select the assessment and, in the **Options** column, click the **Schedule** icon .
   - On the **Assessment Details** tab, in the upper right corner of the window, click **Schedule**.
2. For distribution method, select **Paper**.
3. Complete steps 3-4 from "Schedule an Online Assessment" above.
4. Select the **Schedule to** audience.
   - **All Students**: All students enrolled in the course.
   - **Selected Students**: Displays a class roster from which you can select specific students.

> **Note:** Only rostered students can be scheduled for an offline assessment.

5. Review and edit options as described in "Schedule an Online Assessment" above.
6. Click **Preview** to view the response sheet. For **generic assessments**, in the **Preview for** drop-down list, select **Generic response sheets**.
7. Print the response sheets.
8. Click **Schedule**.

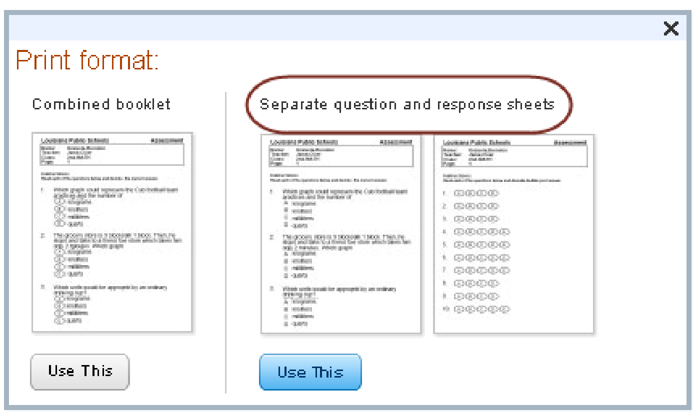


Schedule Paper Assessment

Generic Assessment Response Sheets

To create generic assessment response sheets, complete the steps in "Schedule an Offline/Paper Assessment." Note that the following settings are required:

- In **Print Layout** options, for **Print Format**, select **Separate question and response sheets**.



Print Format window

- In the **Preview** window, in the **Preview for** drop-down list, select **Generic response sheets**.

Schedule a District or School-Wide Assessment

If you are a district administrator, you can schedule assessments to all students in all sections in all schools within the district for a given course. You can also selectively schedule the assessment to any subset of the students.

Follow steps as outlined above to schedule an assessment with the following exceptions:

- Sign in with administrator rights.
- When selecting **Schedule to**, select **All Sections** or **Selected Sections**. Administrators select sections instead of students.

Schedule from Planbook

1. On the pagebar, click **Planbook**.
2. Hover over the calendar date associated with the appropriate class, and click the **Add** icon .
3. In the left navigation pane, expand curriculum to the appropriate lesson, activity, or assessment.
4. Continue with the appropriate schedule steps provided above.

Schedule from Learning Plan

1. In the left navigation pane, select the appropriate class.
2. On the pagebar, click **Learning Plan**, or on the At A Glance page, locate the **Learning Plan** calendar.
3. Click the appropriate date on the calendar.
4. Click **Add more activities**.
5. In the left navigation pane, expand curriculum to the appropriate lesson, activity, or assessment.
6. Continue with the appropriate schedule steps provided above.

Retract an Assignment

An assignment is an activity or assessment that has been scheduled. You can retract an assignment if it is no longer needed or if you scheduled it by mistake. When you retract an assignment, the IMS removes it from student assignment lists. Administrators can retract all scheduled assignments. Teachers can retract only assignments that they have scheduled for a class.

Note: If you want to change an activity or assessment after it has been scheduled, you can modify it instead of retracting and rescheduling. See Edit/Delete Curriculum Objects.

Retract an Assignment

1. On the top navigation bar, click **Classes** and select **Teach**.
2. On the pagebar, select **Curriculum**.
3. In the left navigation pane, select the appropriate class and unit, and then click the name of the activity or assessment that you want to retract.
4. On the Details page for the activity or assessment, click the **Assignments** tab.
5. Locate the assignment and click the **Assignment Name**.
6. Click **Retract** to cancel the scheduled activity or assessment.

7. Click **Yes** to the confirmation message. Once retracted, you can click **Schedule** in the assessment header to reschedule.

Retract option on the Results tab

Retract from Planbook

1. On the pagebar, click **Planbook**.
2. Hover over an item on the Planbook page, and a drop-down arrow appears.
3. Click the drop-down arrow and click **Remove & Retract**. A confirmation message appears.
4. Click **OK**. The IMS removes the assignment from the Planbook page.

Retract from Assignments Page

1. On the pagebar, click **Assignments**.
2. To find the assignment, either filter or search the assignment list.
3. In the **Options** column, click the **Retract** icon. A confirmation message appears.
4. Click **OK**. The IMS removes the assignment from the Planbook page.

Scan and Upload an Assessment

When you use offline assessments, the IMS creates student-specific answer sheets that students use to record their responses. Each answer sheet includes a bar code that identifies the student, teacher, class, and assignment. Alternatively, you can create generic assessment response sheets on which students fill in the bubbles to indicate their student IDs. The class ID and assessment ID will still be imprinted in the bar code of each sheet. After students take the assessment, you must scan student answer sheets so that scores can be imported into the IMS.

Any school-approved personnel can scan answer sheets. Scanning requires at least one scanning hardware device or a printer with pdf, gif, or tif capability. You save answer sheets as a scanned image (many printers offer a print-to-PDF option) and then upload the resulting scanned answer sheet file from your computer. The upload option queues files for loading, so several teachers can load answer sheets at the same time, and the Pinnacle network handles the requests for loading.

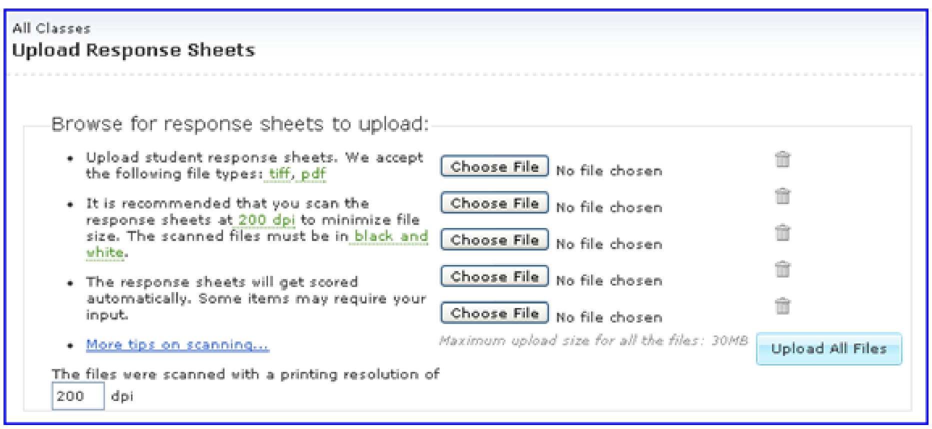
Scanning Guidelines

- Set scanner resolution to **150 or 200 dpi**.
- Use scanner in **Black and White** setting.
- Set scanner to **Text** option if your scanner offers Picture-to-Text settings.
- PDF files cannot exceed 7MB (approximately 175 pages).
- Answer sheets must be vertically aligned (portrait) and original size (no scaling).
- Check the scanned image for the following alignment: Top/Bottom margins approximately 1/2 inch; Left/Right margins approximately 3/4 inch.

Upload Scanned Assessments

You can save an assessment in any scanned format (including pdf, gif, or tif) and use web services to upload data to Pinnacle.

1. Scan documents to an accessible location.
2. Sign in to The IMS.
3. In the top navigation bar, click **Applications** and select **Upload Response Sheet**.
4. Click **Choose File** and browse to your file. You can select up to five files at a time.



Upload Response Sheets window

5. Click **Upload All Files**.

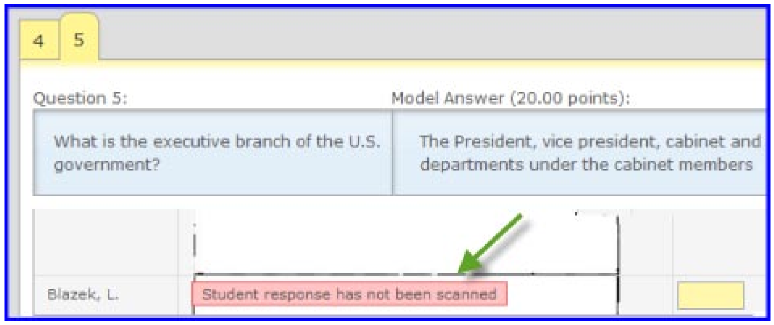
Note: If you have unrostered students, you must wait until they are rostered before you can scan their assessments.

Scanning Issues

Scanning issues are reported within the scanned document, so you can identify the problem quickly and take steps to correct it.

1. In the left navigation pane, select the appropriate class.
2. On the At A Glance page, in the **Lesson Plan** section, click **Required Review**.
3. Click the title of an assessment.

4. Click the **Review** tab.
5. In the **Show** drop-down list, select **Review Required**.
6. Review answers. Any scanning errors are noted within the student response area in a red highlight box.



Scanning Error

Review an Activity

***NOTE:* Students do not have access to the IMS, so all references to functionality requiring students to access the IMS in this section do not apply.**

Students complete activities and submit responses as text, attached files, or both. You can review responses for classes you teach for both gradable and non-gradable activities. You perform reviews on the activity **Review** tab.

You can review activities, add comments, or return submissions for a retry.

1. On the top navigation bar, click **Classes** and select **Teach**.
2. On the pagebar, click **Curriculum**.
3. In the left navigation pane, select the appropriate class and unit.
4. Click the **Lessons/Activities** tab and locate the appropriate activity. In the **Assigned To** column, click the link.
5. Click the **Review** tab.

Review Activity

6. After viewing submissions, select any of the following actions:

- Click **Reviewed** to accept submission.
- Click **Comment** to open a dialog box where you can create a comment for the student and attach a file.
  Click **Add** to save the comment. The IMS selects the **Reviewed** check box for you.
- Click **Retry** to open a dialog box where you can create a comment for the student and attach a file.
  Click **Add** to save the comment. The IMS selects the **Reviewed** check box for you and sets the status to **Retry Allowed**.
- If you are grading the activity, in the **Points** column, type the score for the student's response.

7. Click **Done**.

Review an Assessment

When an assessment is scanned and submitted the IMS places assessment scores in the assessment **Review** tab. The IMS scores multiple choice and true/false questions. However, fill-in-the-blank, constructive response, exhibit passage, and student produced response questions require a teacher review and manual scoring.

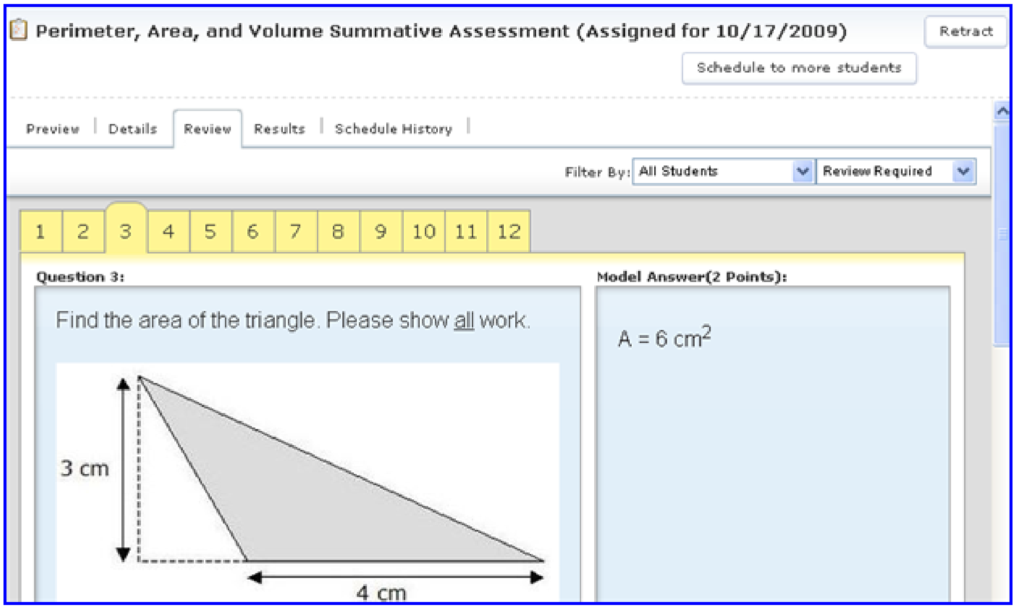
You review responses only for classes that you teach.

Review an Assessment

There are several paths you can take to access an assessment **Results** tab.

1. On the top navigation bar, click **Classes** and select **Teach**.
2. In the navigation pane, select the appropriate class.
3. Open the assessment from any of the following paths:
   - For assessments due or assigned for the current day: On the At A Glance page, in the **Today** section, click the assessment title, and then click **Review**.
   - For assessments that include questions other than multiple choice or true/false: On the At A Glance page, in the **Required Review** section, click **Review**.
   - For all assessments: On the Curriculum page, select the appropriate class, and navigate through the curriculum structure to the assessment. Click the **Assignments** tab, expand the appropriate version, locate the appropriate date, and click the assessment title in the **Assignment Name** column. Click **Review**.
4. In the **Filter by** drop-down list, locate the appropriate student and select **Review Required**.

> **Note:** Question tabs in yellow *require* a review and manual score.



The Assessment Review tab

Optional: For each required review, type a value in the corresponding **Points** field located to the right of the student response, and then click **Done**.

NOTE: The following option is for assessments created with **Mastery Scoring with Item Level, which are not available in the IMS.**

Optional: To review assessments created with **Mastery Scoring with Item Level**, select the mastery level that corresponds to the student's answer. Then select either **Correct** or **Incorrect** as the **Validation** type.

Hint: You may need to scroll to the bottom of the response form to see the **Done** button.

Item Bank

Item Bank Overview

An item bank is a repository of assessment questions. You create an item bank shell and select whether to import content, allow others to create content, or use both the import and create options in combination. Teachers can browse an item bank and add item bank questions to assessments they create.

For organizations that will create their own item bank content, administrators must assign item bank roles. Item bank roles assign appropriate rights that allow you to create, review, and publish content to an item bank.

> **Note:** The Item Bank feature includes several options that must be configured for your school. If you do not see all options, see your Pinnacle administrator for guidance.

Create an Item Bank

An item bank is a container for assessment questions. An item bank must be created before you can add content. Only persons with item bank administrator rights can create item banks. You can create multiple item banks for an organizational level.

> **Note:** The Item Bank feature is optional and must be configured. See your Pinnacle administrator for more information.

Item banks have a parent/child relationship. Though you can restrict access by organization, by default, content you create for item banks at a higher organization level are available for all organizations below that organization. For example, if you create an item bank at the district level, all schools within the district have access to the content.

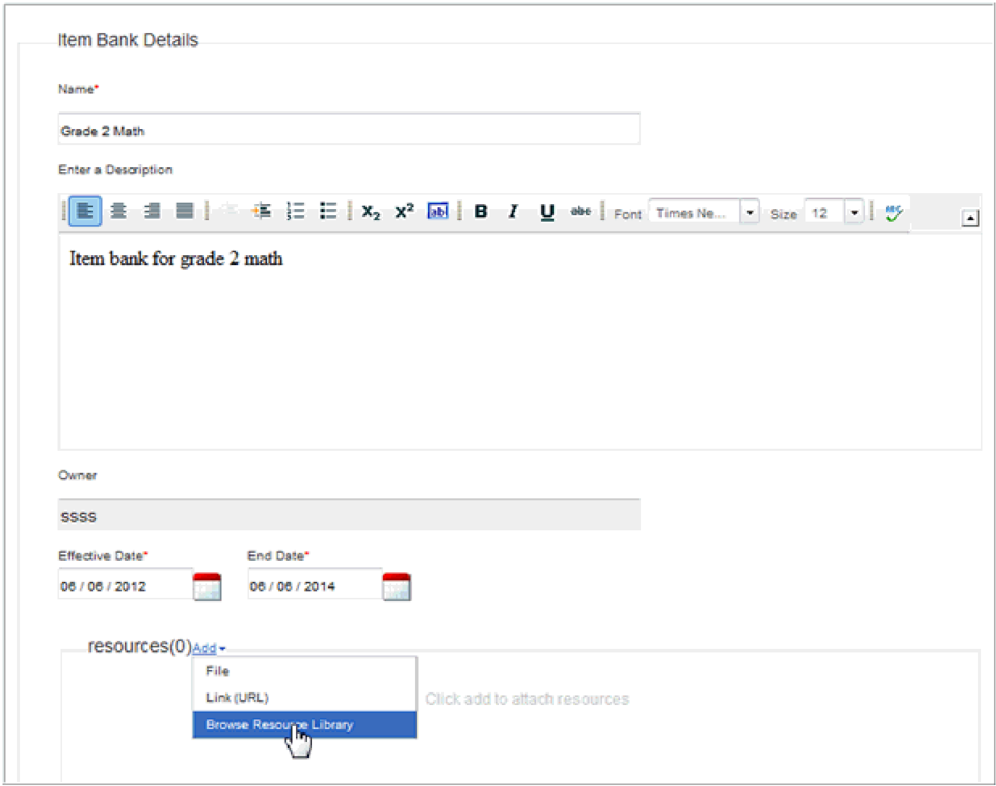
1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, select **Item Bank**.

   Alternatively: In the **Content Management** section of the At A Glance page, click **Item Bank**.

4. Click **New Item Bank**. The Item Bank Setup page opens.
5. Type a **Name**.

   Optional steps:

   - Type a **Description**.
   - Change the **Effective Start** and **End Dates**.
   - Click **Add** to attach a **resource**.



6. Click **Next**.
7. On the **Share** tab, specify whether to share the item bank and its content with other organizations.
   - Click **No** and the item bank and its content are available only to the organization in which it was created.
   - Click **Yes** to share the item bank and its content, and then select the organizations with which to share.
8. Click **Finished**.

   See Item Bank Content Workflow for information regarding how to add content to the item bank.

Browse an Item Bank

Teachers and administrators can browse item banks to select questions for assessments.

To find questions that are appropriate for the grade level and subject you teach, you can filter by subject, question type, grade level, and other criteria.

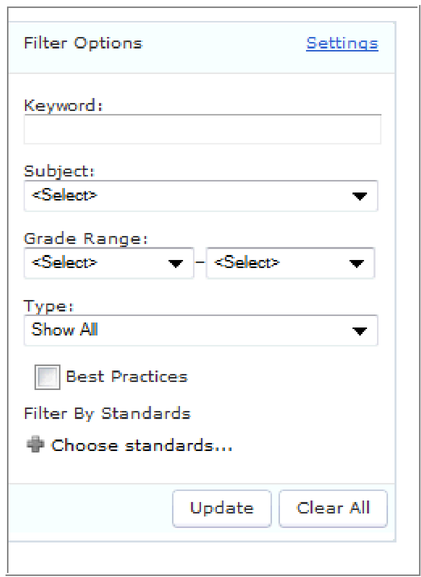
1. On the top navigation bar, click **Applications** and select **Item Bank**.
2. In the left navigation pane, select a district or school.
3. On the Item Banks page, click the title of an item bank to open it.

4. Click **Available Items**.
5. Hover over an item in the **Question Text** column to preview an item.
6. Click the item in the **Question Text** column to view the details for a single item.

Filter the Item Bank

Use **Filter Options**, available in the left navigation pane, to refine your search.

1. Click **Filter Options** and then click **Settings**.



The Item Bank Filter Options

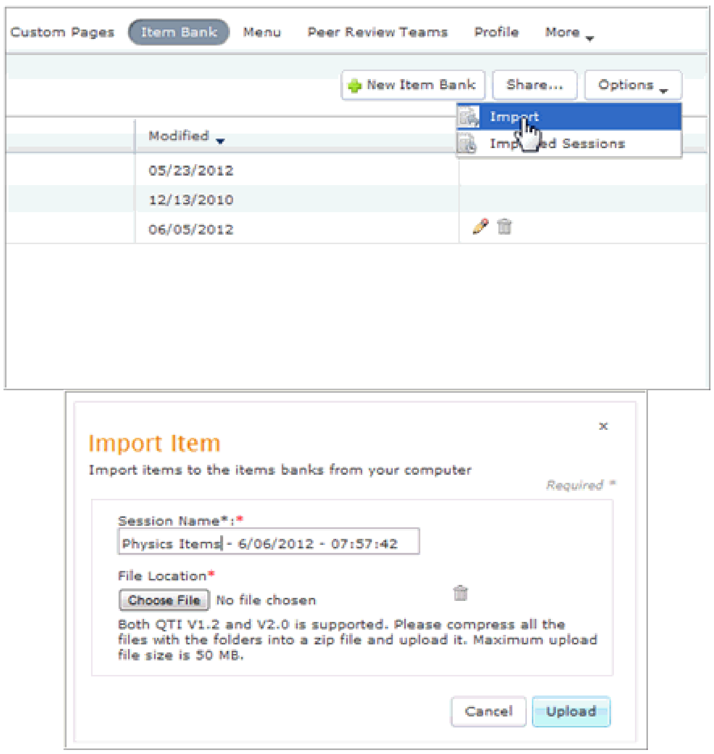
2. Type an **Item ID** to display a single item with the Item ID.
3. In the **Keyword** field, type a word or phrase to list only items that contain the string you type.
4. Select one or more filters from the drop-down lists:
   - **Subject**: Select to filter items by subject (math, literature, science, etc.)
   - **Grade Range**: Select to filter items by a grade or range of grades.
   - **Type**: Select to filter items by item type (multiple choice, true/false, etc.)
5. Click **Best Practices** to list only items that have been flagged as meeting your organization's best practices.
6. Click **Choose standards** to list items that have been aligned to one or more standards.
7. Click **Update** to display all items matching your criteria.

Import Item Bank Content

A school or district can purchase item bank content from a third-party content provider. An Item Bank administrator must import the content to an item bank.

Note: Pinnacle supports importing content files in QTI format, versions 1.2 and 2.0. Before you import a file you must compress it to a zip file and upload it.

1. Sign in with administrative rights and, on the top navigation bar, click **Applications** and select **Item Bank**.
2. In the navigation pane, select an appropriate school/district.
3. Click **Options** and select **Import**. The **Import Item** dialog box opens.



Import Item dialog box

4. Type a **Session Name** or use the default name. The default name uses the format: login name – current date – current time.
5. Next to **File Location**, click **Browse** and locate the file containing the item bank content.
6. Click **Upload**.

Item Bank Content Creation and Review

The IMS supports an item creation workflow that ensures content meets a standard for quality and consistency. The workflow introduces four levels of checks and balances: creation, review, publishing, and best practice review.

The following steps outline the workflow:

1. An author creates a new item and submits it for review.
2. A reviewer makes recommendations and awaits editor approval.
3. An editor approves recommendations and returns the item to the author for revision.
4. The author revises and re-submits the item.
5. The editor can publish or reject the item. Publishing an item adds it to the item bank. The editor can also forward an item to the best practices administrator.

> **Note:** Editors must determine best practice review submission before publishing an item. Once published, the option to forward for a best practice review is no longer available.

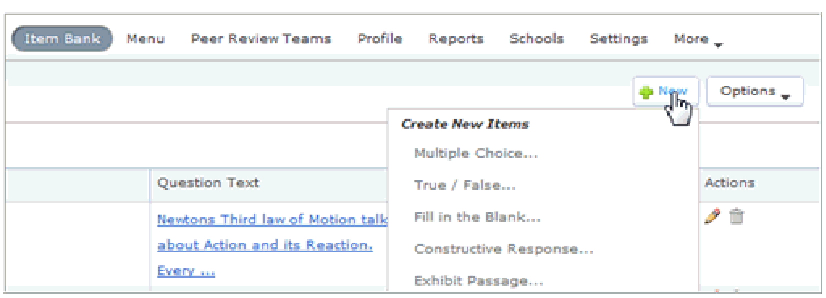
6. The best practices administrator reviews an item to determine whether it meets the organization's definition of a best practice. If valid, the item is marked as "meets best practices." When creating an assessment, teachers can filter items to select only best practice-vetted items.

> **Note:** An item bank must exist as a container before you can create content. See Create an Item Bank.

Create an Item

Only persons with author or super author rights can create items. (Administrators assign these rights when adding staff.)

1. Sign in with author or super author rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate organizational level (district or school), and on the pagebar, click **Item Bank**.
3. On the Item Banks page, select an **Item Bank**. A new page opens with several tabs. The **My Items** tab displays existing item bank items.
4. Click **New** and, in the **Create New Items** list, select an item type.



> **Note:** See Item Types for more information about item types.

5. In the **Create an Item** window, do the following:

a. Select an **Item Level**. This value is used for mastery scoring. If your district is not using mastery scoring, you will not see this field.

b. Select the **Subject** and the **Grade** for the item.

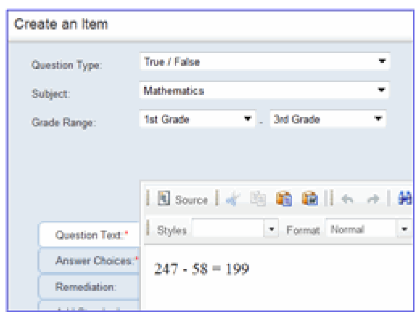
> **Note:** The following optional steps must be configured and may not be available for your school or district. See your Pinnacle administrator for help.

Optional:

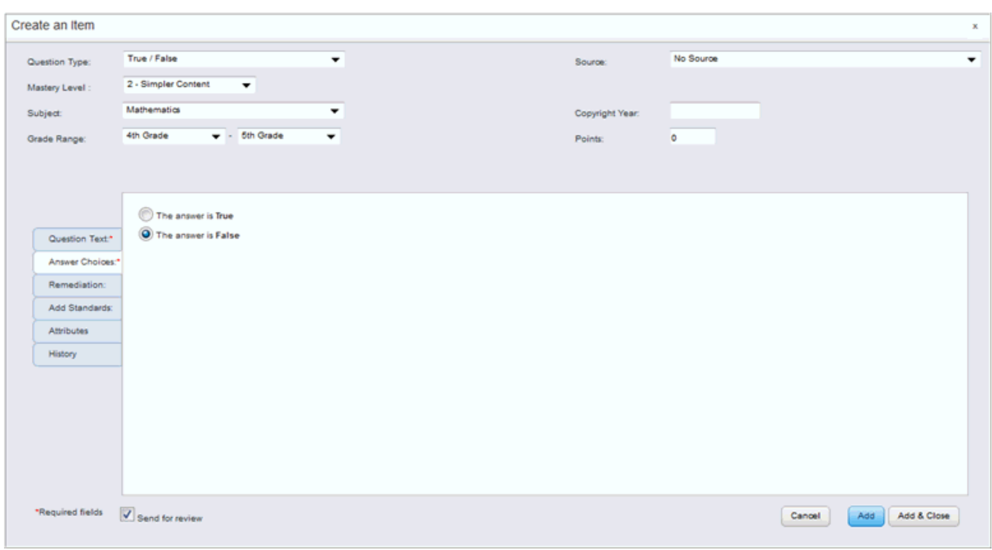
- Select a **Source name**. This supports filtering for item bank searches. If no source exists, click **Create New** to create one.
- Type a **Copyright Year**. This supports filtering for item bank searches.
- For Exhibit Passages, type a **Lexile value** from 0 to 2000. This supports filtering for item bank searches.
- Type a value in the **Points** field.

> **Note**: Teachers can change point value when they select the item for an assessment, but it retains the value you assign here as the default item bank value.

6. Type the question text.



7. Click the **Answer Choices** tab and select or type the correct answer and, for multiple choice questions, add the alternative answers.



Optional: On the **Remediation** tab, type remediation information.

Optional: On the **Standards**, select standards that the assessment item covers.

Optional: On the **Attributes** tab, select any applicable Bloom and Marzano cognitive levels and keyword sets, and type appropriate basic attributes and tags.

The **History** tab displays the revision history of the item, if applicable.

> **Note:** The area where you type the question and answer text contains a rich text editor, allowing you to format your questions and answers. For items that include mathematical equations, the rich text editor includes an **Equation Editor** , which enables you to insert mathematical symbols into equations.

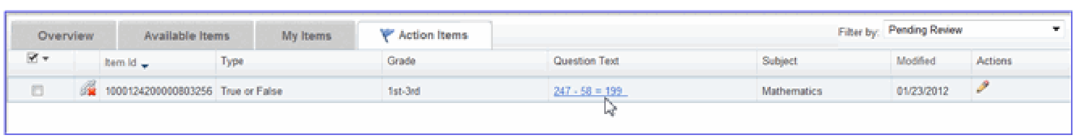
8. Check **Send for review** to place the item in the reviewer and editor queues.
9. Click **Add** to complete the item and create another, or **Add & Close** to complete the item and exit.

   Individuals assigned the roles of item bank reviewer and editor in your school district see the new item in their queues.

Review an Item

Item bank reviewers and editors ensure that items meet quality and consistency standards. After an author creates a new item and sends it for review, the item status is **Pending Review** and it appears in reviewer and editor queues.

1. On the Item Banks page, click an **Item Bank** title.
2. Click the **Action Items** tab, and in the **Filter by** drop-down list, select **Pending Review**. A list displays all pending items.
3. Click an item in the **Question Text** column.



   A new page opens.

4. In the toolbar, click **Add Recommendation**. In the **Enter Recommendation** dialog box, type your comments and click **Add Recommendation**.

   Optional: You can click **View History** to show all actions for the selected item, including the date the question was created, the name of the author, and all recommendations and the dates they were added.

Revise an Item

Only item bank authors and super authors can revise items. The revision function is not available until a reviewer or editor has submitted an item with comments.

1. Sign in with author or super author rights.

2. Complete steps 1-3 from Create an Item.
3. In the **Filter by** drop-down list, select **Requires Revision**. A list displays all pending items.
4. In the **Question Text** column, click an item.
5. Click **Edit** and make appropriate changes.
6. Check **Send for review** to place the item in the reviewer and editor queues. Authors can view the item from the **View All** option in the **Filter by** drop-down. The status is changed to **Pending Review**.

Approve an Item

Only an editor can approve an item.

1. Sign in with editor rights.
2. Complete steps 1-3 from Review an Item.
3. In the toolbar, click **View History** and read reviewer recommendations.
4. Click **Approve Recommendations**. The item moves to the author queue where it appears in **Requires Revision** status.

Note: If you do not approve recommendations, click **Close** and see Publish or Reject an Item.

Publish or Reject an Item

Editors have several responsibilities: they perform the review, approve the recommendations of a reviewer, and make the final decision to publish or reject an item.

Note: Editors at the state level may have additional revision rights that are reserved for authors-only at other organizational levels.

1. Sign in with editor rights.
2. Complete steps 1-3 from Create an Item.
3. Click the **Action Items** tab, and in the **Filter by** drop-down, select **Requires Review**.
4. In the **Question Text** column, click an item. A new page opens.
5. In the toolbar, click **Review Item**.

   Optional: You can type comments in the **Submission Notes** tab.

   Optional: You can select the item for **Best Practices** review. See Review for Best Practices

6. Click **Publish** or **Reject**.
   - **Publish**: Adds the item to the item bank
   - **Reject**: Removes the item from the item bank. A record remains with a **Rejected** status, but the item is no longer available for edit or use by the author. Editors might reject a question because it fails to add value to the organization, or does not meet established criteria.

   Published items move to the **Available Items** tab. You can continue with a best practices review, or leave the item as standard item bank content.

Review for Best Practices

Best-practice administrators have two paths available for review.

- The workflow supports best practice compliance in a two-step process. First, an editor assigns an item for best practices review. Next, a best practices administrator conducts the review and evaluates items against best practice criteria.
- Best-practice administrators have an alternative option available. They can review published items that were not sent for best-practice review and select them as best practices. For this option, follow the alternative directions below.

Editor

1. Follow steps 1-5 from Publish or Reject an Item.
2. To forward to the best-practice administrator for review, click the **Best Practice Notes** tab and select **Yes**.

   Optional: Type notes to share with the best-practice administrator.
3. Continue with step 6 to publish the item. Once you publish, the item moves to the best-practice administrator queue.

Best Practice Administrator

1. Sign in with best-practice administrator rights.
2. Complete steps 1-3 from Create an Item.
3. Click the **Action Items** tab and, in the **Filter by** drop-down list, select **Recommended for Best Practices**.

   Alternatively: For items not sent for review, click the **Available Items** tab.
4. In the **Question Text** column, click an item. A new page opens.
5. At the bottom of the page, click the **Best Practice Comment** tabs.
6. In the **Does this item comply with best practices?** drop-down list, select the appropriate rating.
   - **Not specified**: Leaves the item unrated. The item remains in your **Action Items** queue.
   - **Yes**: The **Best Practice** icon is activated for the item and the **Write a Review** button is available.
   - **No**: The **Best Practice** icon and **Write a Review** button are disabled.

   Optional: Click **Write a Review**, type your comments, and click **Save**.
7. Above the item title at the top of the window, click **Back to Item List**.

Note: You can change the **Best Practice rating** from **No** to **Yes** and back, but once you select either of these ratings, the **Not Specified** option is no longer available.

Create an Item: Item Types

When IMS administrators create item banks, they may choose to allow others to create items for the item banks. For organizations that will create their own item bank content, administrators must assign item bank roles. IMS users with author or super author rights can create items and publish them to an item bank.

In the process of creating assessments, teachers can select items from an item bank, or they can create their own items.

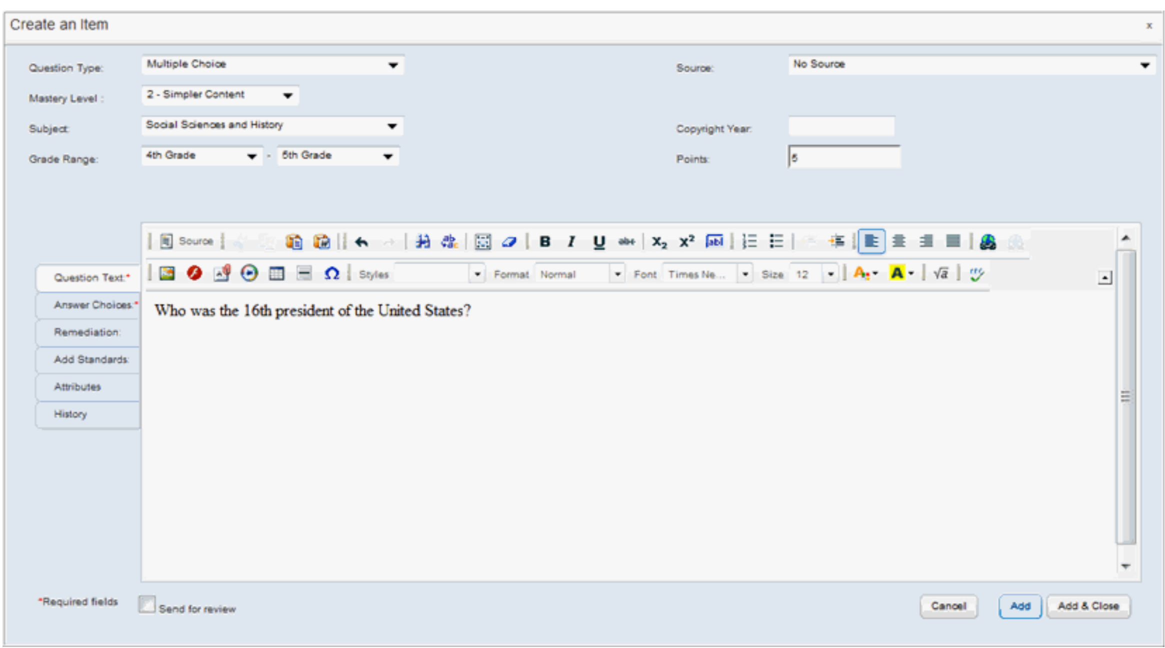
The procedures below describe the detailed steps for creating each type of item. They are intended to supplement the procedures described in Create an Item and Create an Assessment.

- To create an item for an item bank, complete steps 1–4 in "Create an Item," and then do the appropriate steps below. When finished, return to "Create an Item" for additional steps.
- To create an item for an assessment, complete steps 1–12 in "Create an Assessment," and then do the appropriate steps below. When finished, return to "Create an Assessment" for additional steps.

Create a Multiple Choice Item

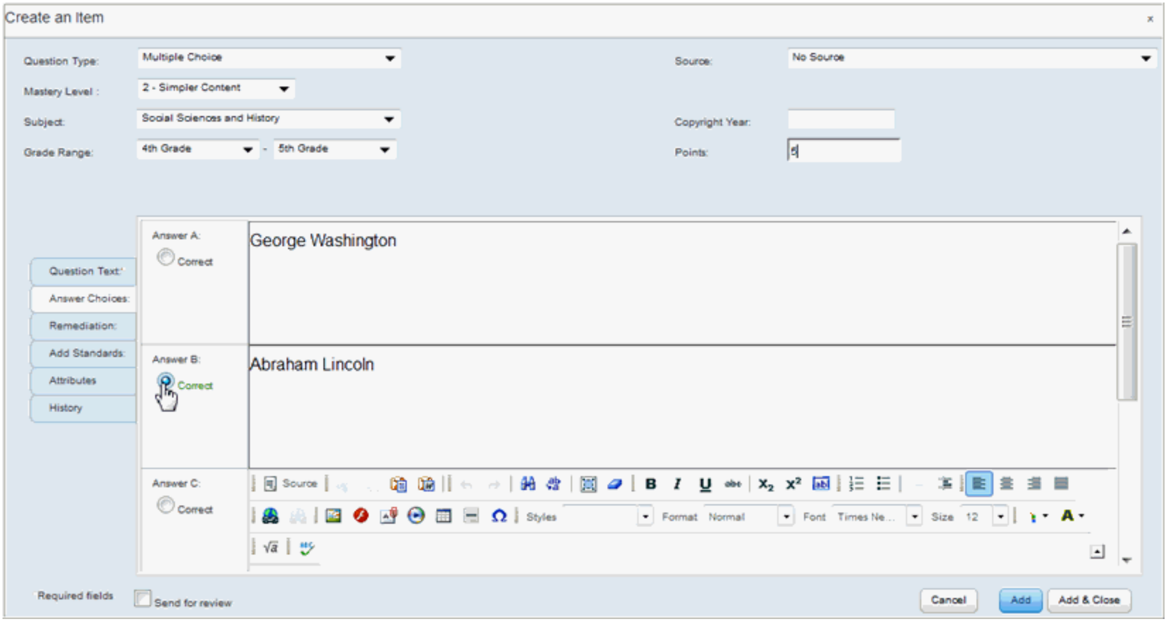
This option allows you to create an item and multiple choice answers.

1. Select the **Item Level**, **Subject**, and **Source**.
2. Type the number of **Points** for the item.
3. Type the **Question Text**. Note that you can add graphics and media files.



Question Text

4. Click **Answer Choices** and type appropriate answers.



Answer Choices

5. Click **Add** to create additional choices.
6. Select the appropriate **Correct** answer.

   Optional: You will be given an option to type a **Remediation** entry for students to read after submitting answers. This option will have no effect because students do not have access to online assessments.

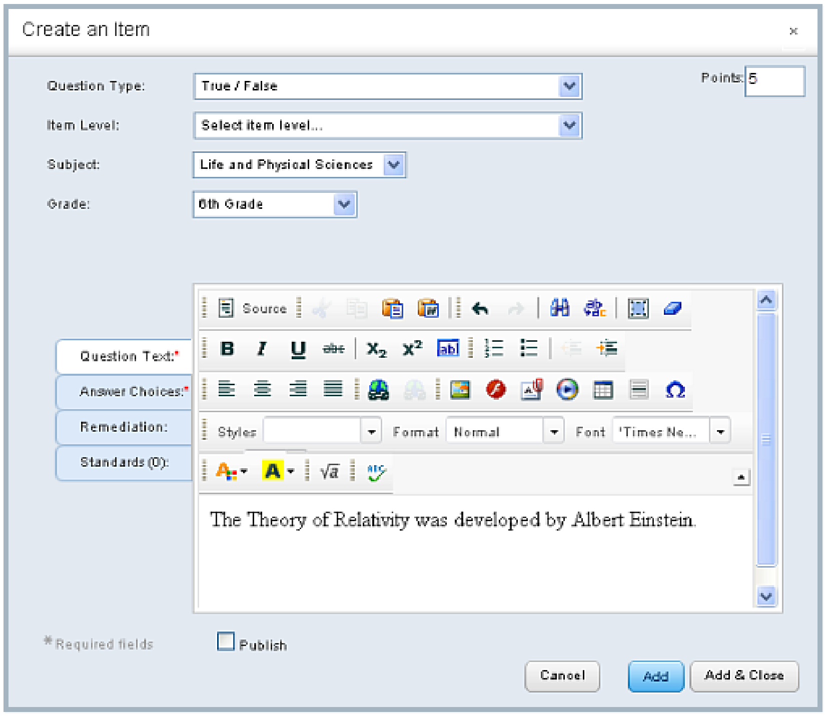
   Optional: Add one or more **Standards**.

7. Click **Add** to add your item and create another of the same type, or click **Add & Close** to add your item and close the Multiple Choice form.

True/False

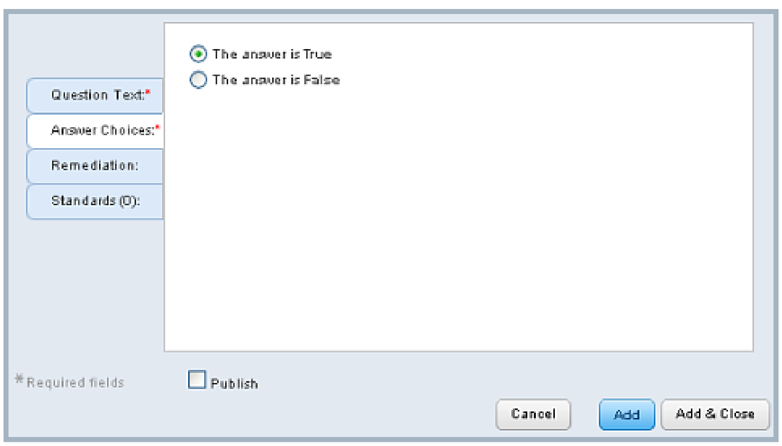
This option allows you to create items in a true/false format.

1. Select **Item Level**, **Subject**, and **Grade**.
2. Type the number of **Points** for the item.
3. Type **Question Text**.



True/False Question Text

4. Click **Answer Choices** and select the correct answer.



True/False Answer Choices

Optional: You will be given an option to type a **Remediation** entry for students to read after submitting answers. This option will have no effect because students do not have access to online assessments.

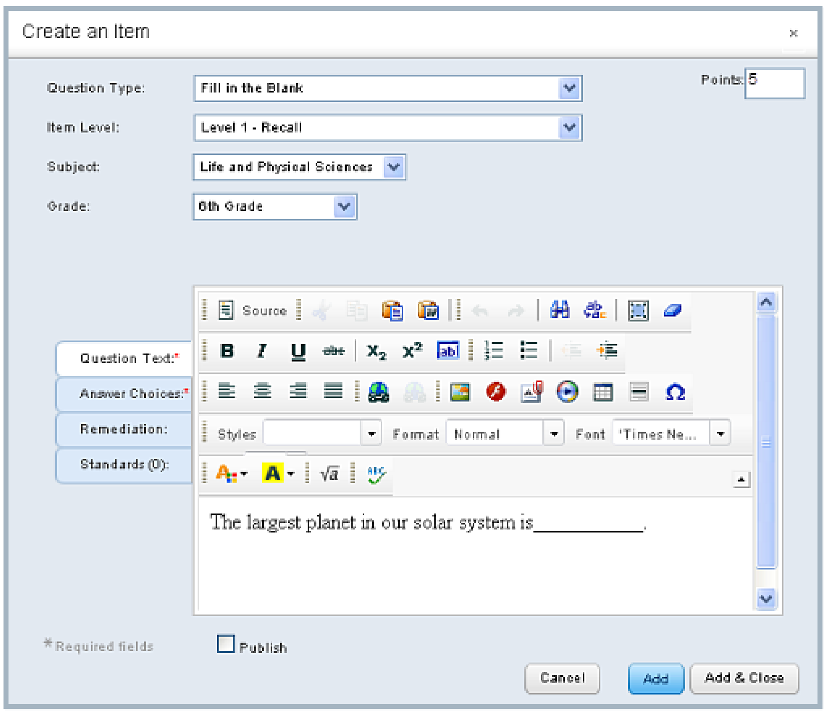
Optional: Add one or more **Standards.** You are limited to the list of standards you added on the **Standards** tab.

5. Click **Add** to add your item and create another of the same type, or click **Add & Close** to add your item and close the **True/False** form.

Fill in the Blank

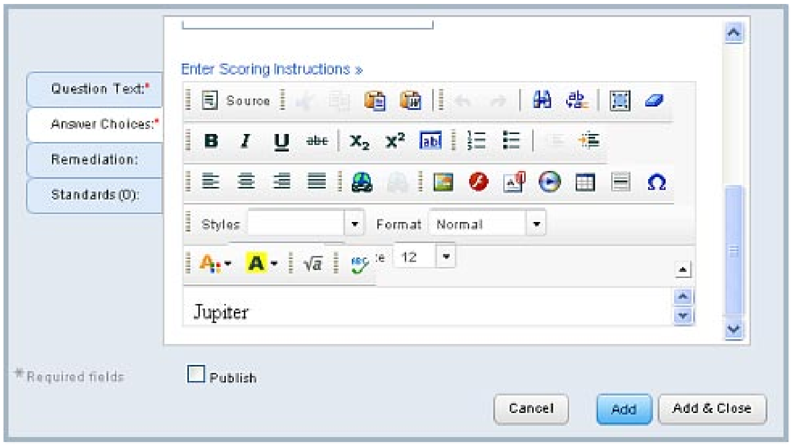
This option allows you to create test items and create blanks for student response.

1. Select **Item Level**.
2. Type the number of **Points** for the item.
3. Type the **Question Text** and include a minimum of four underscores for each blank. (Multiple blanks must be separated by a space.)



Fill in the Blank Question

4. Click **Answer Choices** and type appropriate answers. Complete only one answer for each blank provided in the test item.



Fill in the Blank Answer

Optional: Type alternative answers or guidance for determining a correct answer if needed.

Optional: You will be given an option to type a **Remediation** entry for students to read after submitting answers. This option will have no effect because students do not have access to online assessments.

Optional: Add one or more **Standards.** You are limited to the list of standards you added on the **Standards** tab.

5. Click **Add** to add your item and create another of the same type or click **Add & Close** to add your item and close the form.

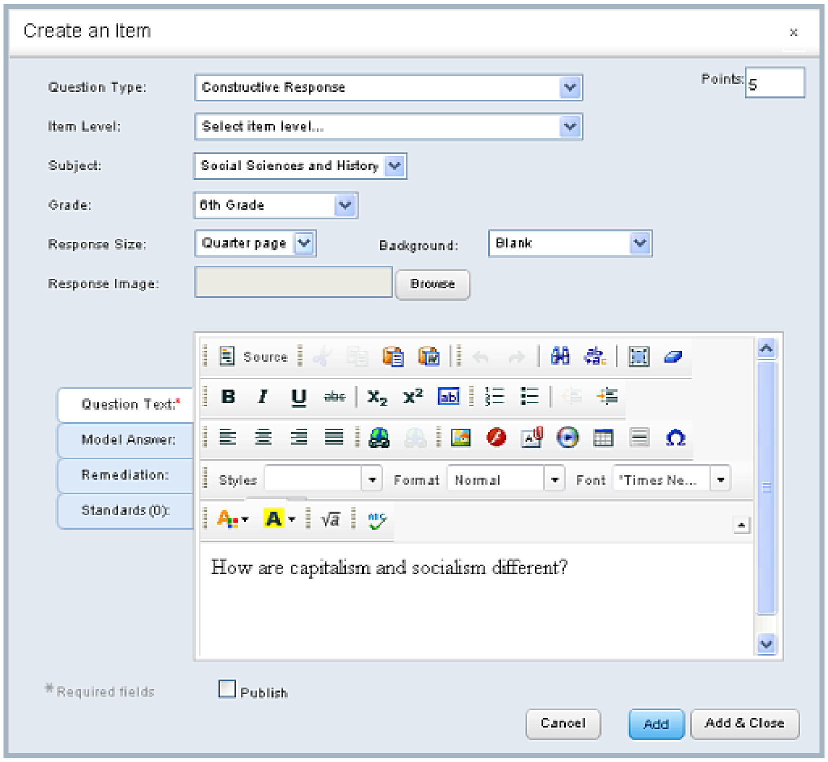
Constructive Response

This option allows you to create constructed response items.

1. Type the number of **Points** for the item.
2. Select the **Response Size**. This is the amount of space reserved on the answer sheet for the student's response.
3. Select the **Background**. This allows you to display the item with a ruled background.

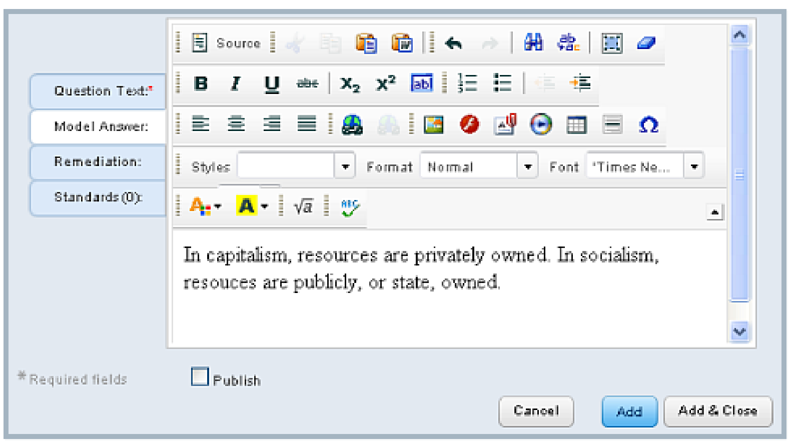
   Optional: To add a response image, select the appropriate **Response Size** and **Background** settings from the drop-down lists, and browse to select the **Response Image**.

4. Type the **Question Text**.



Constructive Response Question

5. Click **Model Answer** and type an appropriate answer.



Constructive Response Answer

Optional: You will be given an option to type a **Remediation** entry for students to read after submitting answers. This option will have no effect because students do not have access to online assessments.

Optional: Add one or more **Standards**. You are limited to the list of standards you added on the **Standards** tab.

6. Click **Add** to add your item and create another of the same type or click **Add & Close** to add your item and close the Constructive Response form.

Exhibit Passage

This option allows you to create a text passage or image, such as a map, and create one or more items related to the displayed item.

1. Type a **Passage Title**.
2. Click the **Exhibit Passage** tab, and type or insert the passage.

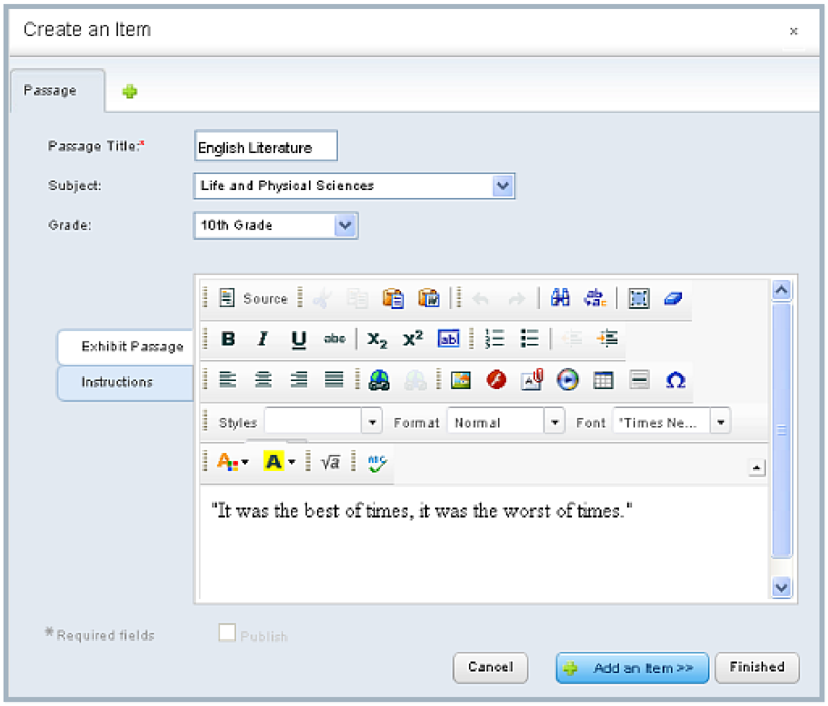
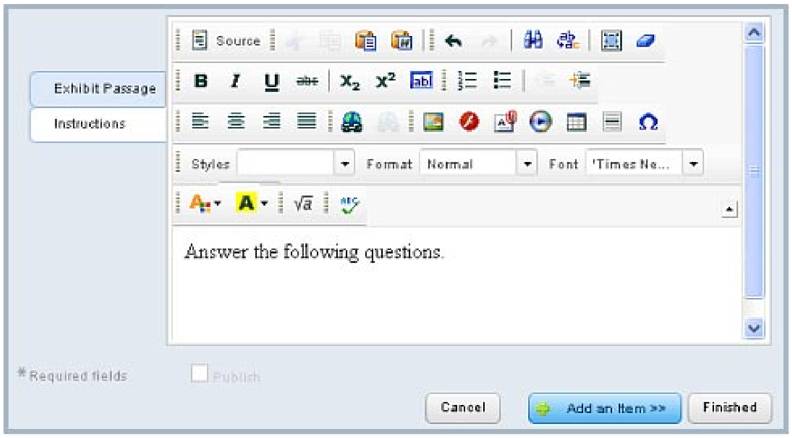


Exhibit Passage Tab

3. Click the **Instructions** tab and type instructions.



Instructions Tab

4. Click **Add an Item**.
5. Select a **Question Type** from the drop-down menu.
6. Type the number of **Points** for the item.

   Optional: Select an item cognition level.

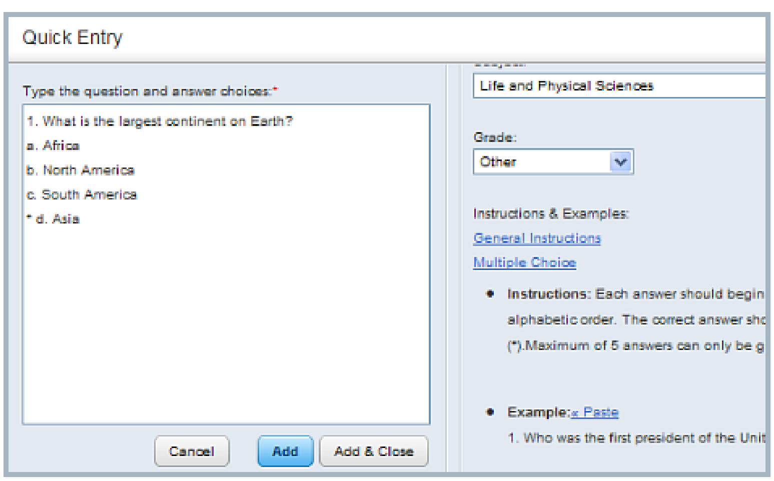
7. Complete steps appropriate to the item type selected.
8. Click **Add an Item** to add your item and create another of the same type, or click **Finished** to add your item and close the form.

Quick Entry

This option allows you to create items and answers in one process, using predefined codes to format your assessment.

Note: This option is available only when creating an assessment. It is not used for creating items for an item bank.

1. Click **Instruction and Examples** links as required.
2. Type assessment information using instructed format.



Quick Entry window with multiple choice question

3. Click **Add** to include your item and create another of the same type, or click **Add & Close** to add your item and close the Quick Entry form.

Create a New Version of an Item

After an item has been published to an item bank, you can make revisions to that item. The IMS then assigns a new version number to the item. During the process of updating the item, you indicate whether it is a major or minor revision. A major revision is one in which the item has changed significantly, and student results for the revised version should not be compared to results for previous versions. A minor revision does not affect the item content in any substantive way.

When you create a new version of an item, the item goes through the same review and revision workflow as when you created a new item. The item bank editor reviews the revision and the major or minor classification. The editor can change the classification, if appropriate, and then publish the new version of the item.

If the new version is classified as a minor update, then any assessment that includes that item will be automatically updated with the new version. If the new version is classified as a major update, then the author of any assessment that includes that item receives a notification of the new version, and can opt to include the new version in the assessment or not.

Note: When an assessment is updated with a new version of an item, the updates are not applied to any scheduled instances of the assessment.

The IMS assigns new versions as follows:

- **Major revisions**: Version number is increased by 1; for example, from version 1.0 to version 2.0.
- **Minor revisions**: Version number is increased by .1; for example, from version 1.0 to version 1.1.

Item and Assessment Versioning Process

Item Author

1. Sign in with author or super author rights and, on the top navigation bar, click **Applications** and select **Item Bank**.
2. On the Item Banks page, select an Item Bank. A new page opens with several tabs. The **My Items** tab displays existing item bank items.
3. Click an item to open it, and then click **Edit**.
4. Enter revisions to the item.
5. Optionally, complete the following steps:
    - At the bottom of the page, click **Add update details**, and type an explanation of the updates. Then click **Finished**.
    - Select the **Major Revision** check box if appropriate.

- Select the **Send for review** check box and click **Save**.

Item Editor

1. Follow standard process for reviewing items.
2. Verify that the revision has been appropriately classified as a major or minor revision. Check or un-check the **Major Revision** check box, if appropriate.
3. If the item is approved, click **Publish**. The item is published to the item bank, classified as a major or minor update.
   - If the update is minor, it is then propagated to all assessments that include that item. The item and, if it has not yet been assigned, the assessment are assigned a new version number.
   - If the update is major, the authors of any assessments that include the item receive a message in their Home page **Tasks** section, labeled **Assessments Updates**.

Assessment Author

1. On the Home page, in the **Tasks** section, click **Assessments Updates**. A list of assessments that contain items with major updates is displayed.
2. In the **Actions** column for an assessment, click the **Review** icon to view the changes to the item(s).
3. To accept updates to an assessment:
   a. Select the check box to the left of the assessment title, and click **Accept Updates**.
   b. In the **Accept Updates** pop-up window, select either **Minor Revision** or **Major Revision**, and click **Yes**.

> **Note:** If you accept updates, any currently assigned instances of the assessment are not updated.

4. To reject updates to an assessment:
   - Select the check box to the left of the assessment title, and click **Reject Updates**. The assessment remains unchanged and the item is cleared from your **Tasks**.

> **Note:** Once you reject an update to an assessment, if any subsequent updates are made to the item, you will not receive notification and the updates will not be incorporated into the assessment.

Assignments

Assignments Overview

***NOTE:* Students to do not have access to the IMS. Any directions that involve functionality requiring students to access the system (e.g. sending messages or assigning homework to students) will not work. The directions provided here are helpful in maintaining a calendar of assignments and activities similar to using your plan book.**

Assignments are *scheduled* activities and assessments. On the Assignments page, teachers view all assignments scheduled for a class, while administrators view assignments scheduled on a school or district-wide basis. This page offers details such as start and due dates, scored status of assignments, and class-average scores for assignments. Teachers can schedule or retract assignments from this page, or view and print various reports.

Assignment Tasks

Refer to the following topics for step-by-step instruction:

- View Assignments
- Retract a Scheduled Activity or Assessment
- View Assignment Results

Edit an Assignment

After you schedule an assignment, you can modify it by changing the schedule date, assigning it to more students, or removing students from the assigned students list. You can edit only those assignments that you have scheduled.

Edit an Assignment

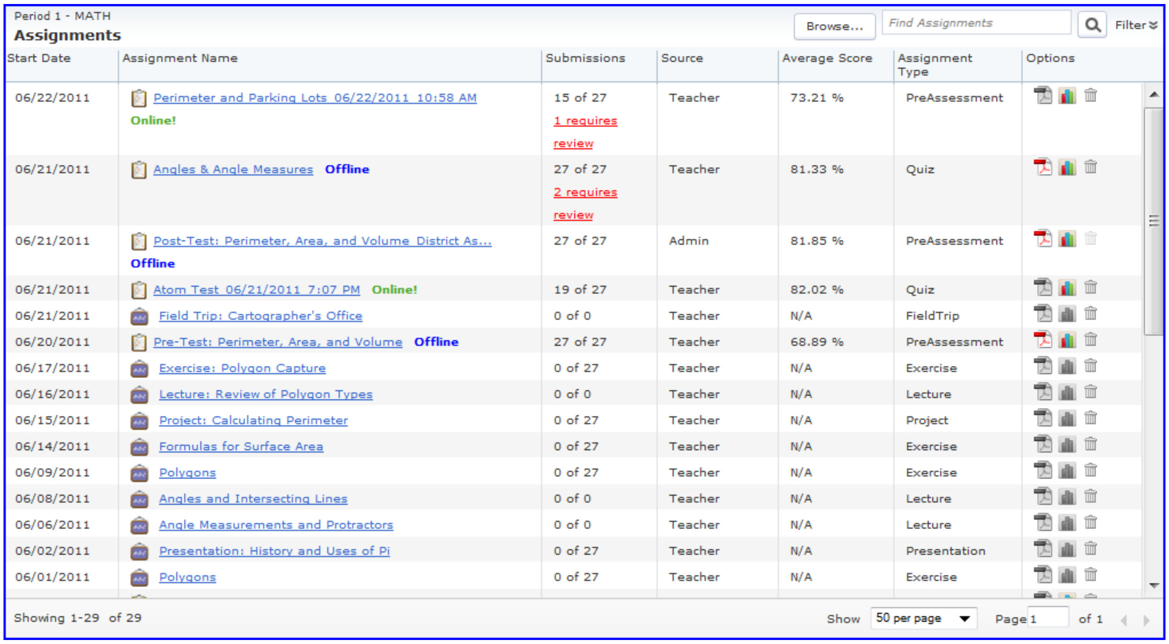
You edit an assignment on the Assignments page.

1. In the navigation pane, click the name of the class or organization level for which you want to view assignments.
2. On the pagebar, click **Assignments**. The Assignments page opens.
3. Click the **Edit**  icon for the assignment you want to edit.
4. On the Scheduling Options page, change the **Schedule date**, **Due date**, and/or **Closing date**, as appropriate.
5. To add more students, click **Add more** beneath the list of students and select the appropriate students.
6. To remove students from the assignment, select one or more students and click **Remove**.
7. Click **Schedule** (you might need to scroll down to see the **Schedule** button).

View Assignments

You can view a list of current assignments for a class or organization level on the Assignments page.

1. On the top navigation bar, click **Classes**, select **Teach** or **Attend**, and, in the left navigation pane, select a class.
2. On the pagebar, click **Assignments**. The Assignments page displays a list of all assignments scheduled for the selected class.



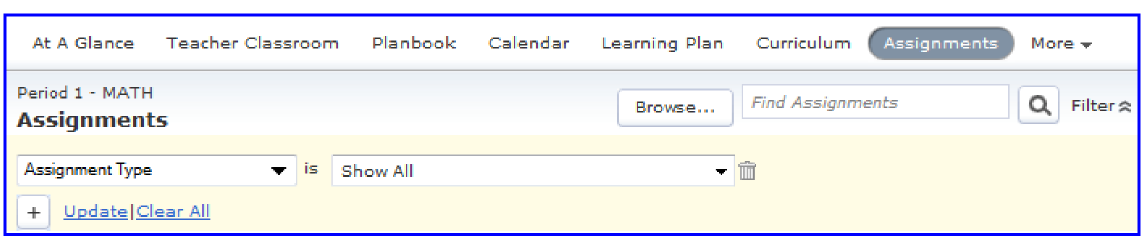
Assignments page

Optional: To increase or decrease the number of assignments listed per page, select a different option in the **Show** drop-down list at the bottom of the page, or click the page arrows to view additional pages of items.

Filter Assignments

1. At the top of the page, click **Filter**.
2. In the first drop-down list, select a filter:
   - **Assignment Type:** Select to filter assignments by type (quiz, test, self-assessment, etc.).
   - **Response Type:** Select to filter assignments by distribution method (you must select offline) and the type of response required.
   - **Start Date:** Select to filter assignments by start date.
   - **Review:** Select to filter assignments by review status (completed, required).
3. Select filter criteria from the second drop-down list.

   Optional: Click to add additional filter criteria, and repeat steps 2 and 3.



Filter fields in the Assignments page

Optional: Click the **Delete** icon next to filter fields to remove a filter. To remove all filters, click **Clear All**.

4. Click **Update** to populate a filtered list.

Search for Assignments

You can narrow your search further with a text search.

1. Type assignment title text in **Find Assignments** above the assignments list.
2. Click the **Search** icon. A list of assignments matching your search text is displayed.
3. To clear search results, click the **X** in the **Search** field.

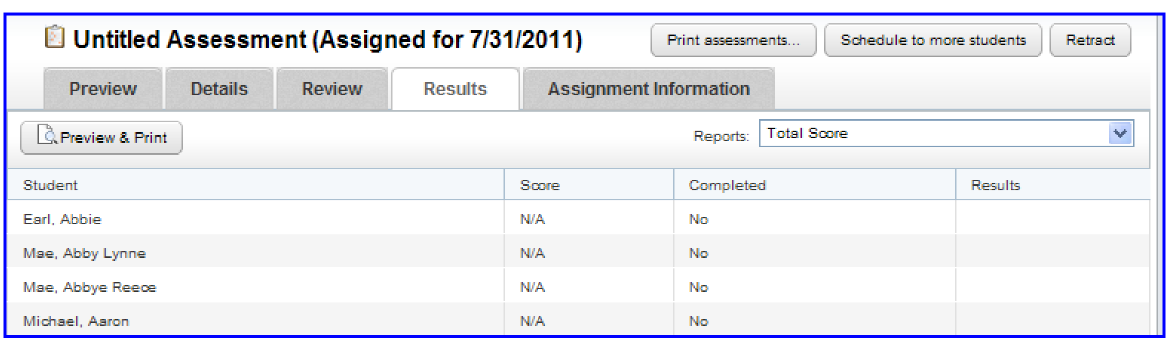
View Assignment Results

Teachers and administrators can view assignment status and results.

NOTE: Students do not have access to the IMS, so assignments and assessments must be entered individually by the teacher in order to appear in the IMS

1. In the navigation pane, click the name of the class or organization level for which you want to view assignment results.
2. On the pagebar, click **Assignments**. The Assignments page opens.
3. To find the assignment, either filter or search the assignment list.
4. In the **Options** column, click the **Show Result** icon. The relevant item appears with the **Results** tab displayed.

   The **Completed** column indicates whether the student has completed the assignment. If so, the score is shown in the **Score** column.



Assignment Results tab

5. To view results for a specific student, in the **Results** column, click the **View** link. The student's completed assignment opens in a new window.
6. To view and print a report, select an option from the **Reports** list, and then click **Preview and Print**. The selected report opens in a new window. For more information, see Assessment Reports.

Data Manager

Data Manager Overview

Note: The Data Manager feature is an optional module available only to IMS administrators. If you have questions about this feature, contact your system administrator for more information.

The Data Manager feature allows administrators to import and export assessment data in XML format. After you export assessment data, you can view it in Microsoft Excel. In addition, you can do the following:

- Sort the data
- Create pivot tables to analyze the data
- Measure student performance and assessment effectiveness
- Create reports.

Administrators access Data Manager features on the Data Manager page. The Data Manager page lists completed export jobs and any jobs with reported issues.

Data Manager Tasks

- Use Data Templates
- Export Assessment Data
- Import Data
- View and Manage Scheduled Jobs

Data Templates

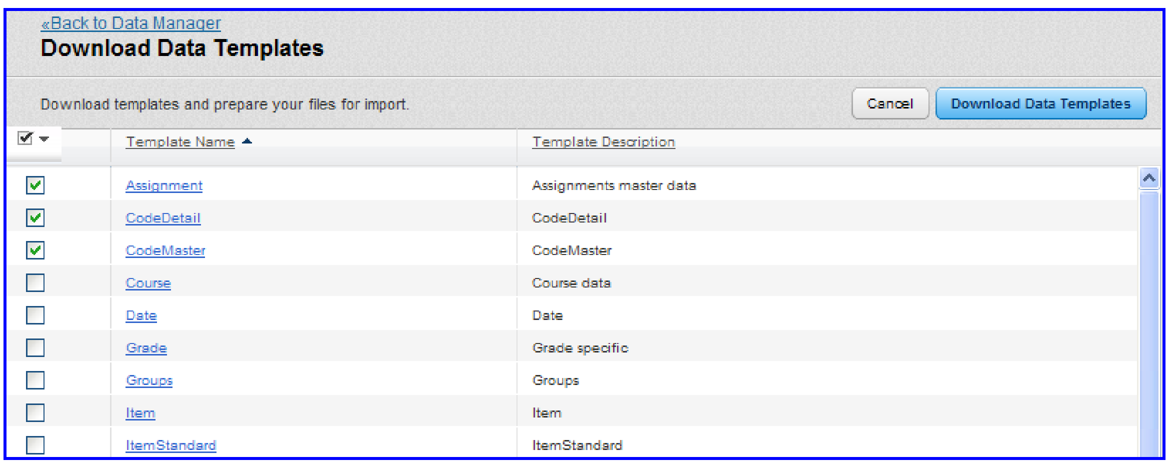
Data templates define the structure and format options available to import data. You can view and download templates from the Download Data Templates page, create data based on the downloaded templates, and then import the data to the system.

Note: The Data Manager feature is an optional module available only to IMS administrators. If you have questions about this feature, contact your system administrator for more information.

Download Data Templates

Use provided templates to assist with data imports. You can download specific templates in Microsoft Excel (.xlsx) format, or download a .zip file containing multiple templates.

1. On the top navigation bar, click **Applications** and then click **Data Manager**. The Data Manager page opens.
2. Click **Download Data Template**. The Download Data Templates page opens.



3. In the far left column, select the check box for each template you want to download. To download all templates, select the check box in the column heading.
4. Click **Download Data Templates**. A dialog box opens.
5. In the dialog box, select to **Open** the .zip file containing the templates or to **Save** it to a location on your computer.

   Alternatively: Click a link in the **Template Name** column to download a single template.

Export Assessment Data

Note: The Data Manager feature is an optional module available only to IMS administrators. If you have questions about this feature, contact your system administrator for more information.

Exported data is saved to the IMS server, where you can download it to your local drive. Also, you have an option to save the file to an FTP site. You can schedule data exports following a recurring schedule or on a one-time-only basis. The IMS exports the assessment data in a standard XML format.

1. Sign in with administrative rights and, on the top navigation bar, click **Applications** and select **Data Manager**.
2. In the navigation pane, select the appropriate organization.
3. On the Data Manager page, select **Export Data**.
4. Type the desired **File Name** for the exported data file.
5. Under **Save As Type**, choose **XML Spreadsheet**.

   Optional: To save the exported file to an ftp site:

   a. Select **Save to FTP location**.
   b. Enter an **FTP Path**, **Username**, and **Password**.
   c. Click the **Test Connection** link to verify that The IMS can connect to the server using the information you entered.

Note: The exported file is saved to the IMS server, even when you save it to an FTP server.

6. Under **Schedule the Export As**, choose one of the following:
   - **One Time Export**: Choose this to export the assessment data only one time.
   - **Scheduled Recurrence**: Choose this to specify a regularly scheduled recurrence pattern for the selected assessment data. When you click **Scheduled Recurrence**, the recurring options expand.
7. Under **Filtering Options**, choose the organizations whose assessment data you want to export.
   - If you are a state administrator, you can select all districts or selected districts within the state.
   - If you are a district administrator, you can select all schools or selected schools within the district.
8. Using the filter options, you can select one or more organizations, a date range, a grade, a subject, or any combination of the three criteria.

Note: Exported files can be quite large. You should consider setting limits (date range, grade, subject) on the data you select to export.

9. Click **Finish**.

   The **Export Data** job is added to **Scheduled Jobs**, where it is queued with other scheduled jobs. The IMS processes the jobs in the order they are created.

Exported Assessment Data: Field Layout

The table below shows the layout of the fields in the exported assessment data file.

Note: Each record in the exported data represents a unique assessment question for each student. To illustrate, if you export a 15-question assessment that was given to 10 students, the exported file will have 150 records; 15 records for each student, each record containing the results for a single question.

Sequence Number	Date Field	Description	Data Type
1	StateName	Name of the state in which the school district is located	varchar
2	DistrictName	Name of the school district	varchar
3	SchoolId	GUID	uniqueidentifier
4	School Name	Name of the school	varchar
5	ClassId	GUID	uniqueidentifier
6	Class Name		varchar
7	Teacher RefId	GUID	uniqueidentifier
8	Teacher Id		varchar
9	Teacher Name		varchar
10	Unit	Parent unit	varchar
11	Lesson	Parent lesson	varchar
12	AssessmentId	GUID	uniqueidentifier
13	AssignmentId	GUID	uniqueidentifier
14	Assessment Title		nvarchar(200)
15	AssignedDate	Date on which the assignment is created	datetime
16	DueDate	Date by which the assignment is due	datetime
17	ClosedDate	Date when the assignment is closed and no student submission will be taken	datetime
18	AssignmentStatus	Assigned/Closed/Deleted	varchar
19	ItemId	GUID	uniqueidentifier
20	ItemType	Type of question (multiple choice, true/false, etc.)	smallint

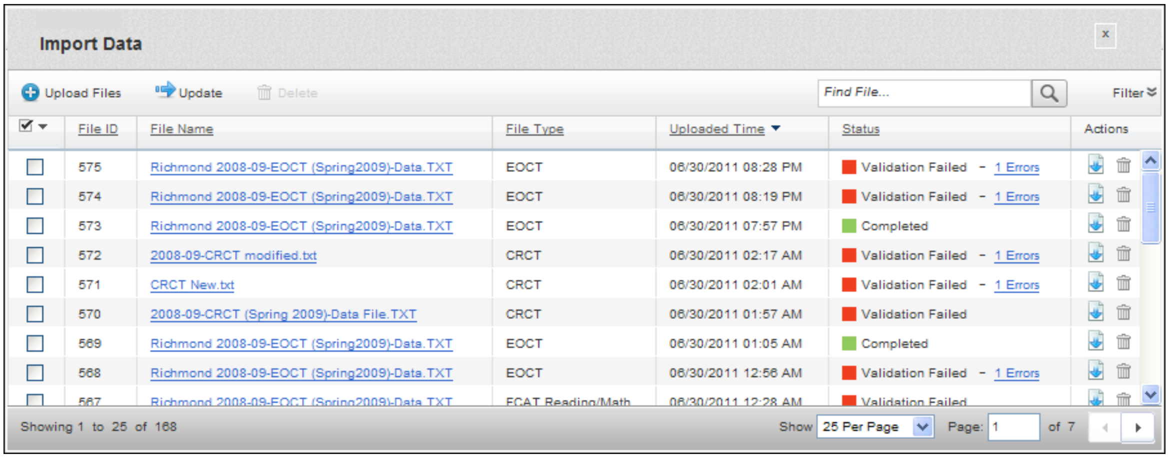
21	ItemNumber	Location of the question on the assessment (for example, question 6 in the assessment)	smallint
22	ItemMaxPoint	Max points for the question	decimal(10,4)
23	TotalMaxPoint	Max points for the assessment	decimal(10,4)
24	ItemCorrectAnswer	Correct answer for the question	nvarchar(max)
25	ItemStandardIds	GUIDS: There can be multiple standards for a given question	nvarchar(max)
26	Student RefId	GUID	uniqueidentifier
27	StudentId		varchar
28	Student Name	Last Name, First name	varchar
29	StudentItemResponse	Student's answer	nvarchar(max)
30	StudentItemPoint	Points given to student	decimal(10,4)
31	ResultUpdatedDate	Last updated date and time	datetime
32	StudentItemPoint	Points given to student	decimal(10,4)
33	ResultUpdatedDate	Last updated date and time	datetime

Import Data

On the Import Data page you can upload files, view the status of uploaded files, and delete files.

Note: Note: The Data Manager feature is an optional module available only to administrators. If you have questions about this feature, contact your system administrator for more information.

1. On the top navigation bar, click **Applications** and select **Data Manager**. The Data Manager page opens.
2. On the Data Manager page, click **Import Data**. The **Import Data** dialog box opens.



This page lists all files previously imported. The **Status** column displays the status of the upload process. Status can be **Processing** (blue), **Validation OK** (green), **Validation Warning** (yellow), and **Validation Failed** (red).

Import Data Tasks

Use the Import Data page to perform the following tasks:

- Upload Template-Based Files
- Upload Assessment Data
- Work with Imported Files

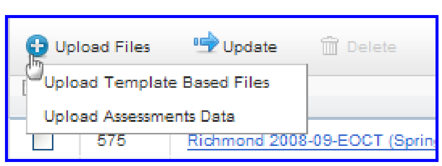
Upload Template-Based Files

Data for import must be formatted correctly prior to import.

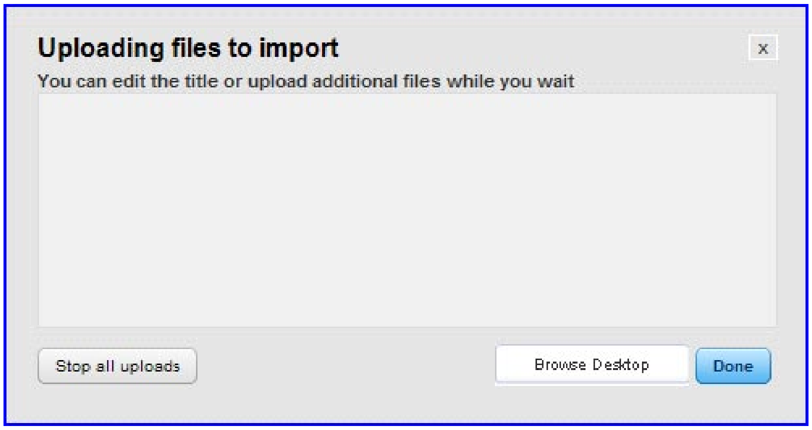
Note: You must use the `Template_OrgID_DateTime_External.txt` naming convention for template-based data files. For example, if you import data using the Assignment template, for an organization with an ID of Org1, and the import is scheduled for the 30th of June 2011, the correct file name is: `Assignment_Org1_2011-06-30-00-00-01_External.txt`

Caution: If you do not use the correct file name format, you will receive an error when you attempt to upload files.

1. On the top navigation bar, click **Applications** and select **Data Manager**.
2. Click **Import Data**.
3. Click **Upload Files** and select **Upload Template Based Files.**



The **Uploading Files to Import** dialog box opens.

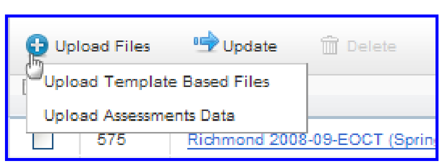


4. Select files to upload.
   a. Click **Browse Desktop**.
   b. Find the location on your computer or network that contains appropriate files.
   c. Select the file or hold the **Ctrl** key on your keyboard to select multiple data files.
5. Click **Open**. The **Uploading Files to Import** dialog box shows the progress of the upload.
   a. If you want to stop the upload, click **Stop All Uploads**.
   b. A message appears when all the files successfully upload.
6. Click **Done**. The **Import Data** dialog box opens. The uploaded files appear at the top of the dialog box, with a status of **Processing**.
7. See Work with Imported Files for information about working with the files after import.

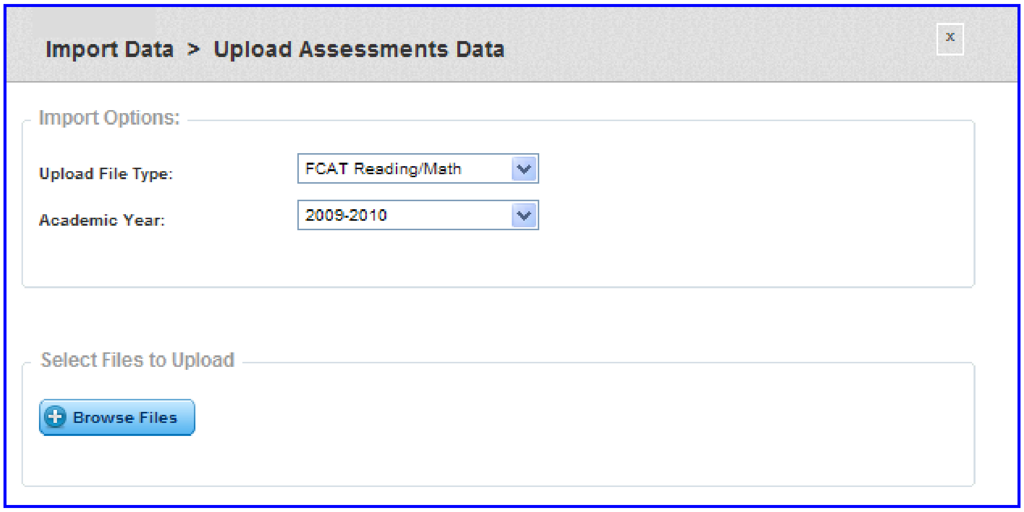
Upload Assessment Data

You can upload assessment data from various state and national reports to The IMS through the **Import Data** dialog box. When you import assessment data, you must specify the assessment type and academic year associated with your data.

1. On the top navigation bar, click **Applications** and select **Data Manager**. The Data Manager page opens.
2. Click **Import Data**. The **Import Data** dialog box opens.
3. Click **Upload Files** and select **Upload Assessments Data**.



The **Upload Assessments Data** dialog box opens.



4. Select the **Upload File Type**.
5. Select the **Academic Year**.
6. Click **Browse Files**. The **Uploading Files to Import** dialog box opens.
7. Select files to upload.
    a. Click **Browse Desktop**.
    b. Find the location on your computer or network that contains appropriate files.
    c. Select the file or hold the **Ctrl** key on your keyboard to select multiple data files.
    d. Click **Open**.
    e. The **Uploading Files to Import** dialog box shows the progress of the upload.
    f. If you want to stop the upload, click **Stop All Uploads**. A message appears at the top of the dialog box when the files finish uploading.
8. Click **Done**. The **Import Data** dialog box opens. The uploaded files appear at the top of the dialog box, with a status of **Processing**.
9. See Work with Imported Files for information about working with the files after import.

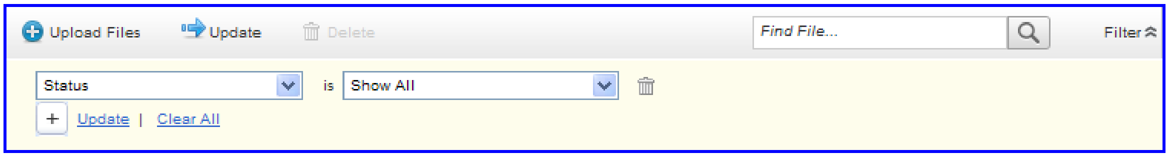
Work with Imported Files

Refer to the following topics for information about tasks you can perform on the Import Files page.

- Filter Imported Files
- View File Details and Error Log
- View or Change the File Template
- Download a Data File
- Delete Imported Files
- Erase Imported External Assessment Data

Filter Imported Files

1. On the toolbar, click **Filter**. A set of filter fields appears at the top of the page.

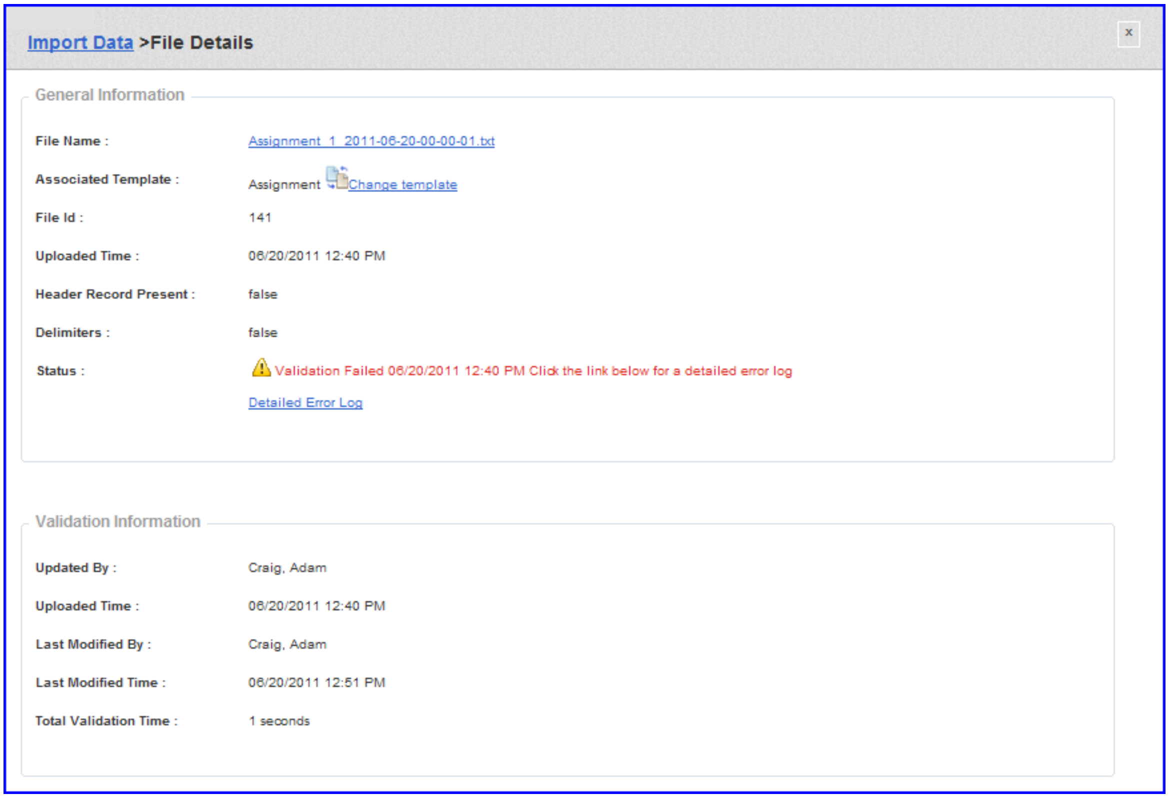


2. Select a filter type from the first list.
   - **Status**: Files are filtered according to their validation status.
   - **Completed Date**: Files are filtered based on a date or on a range of dates.
   - **Template**: Files are filtered based on the associated file template.
3. Select the filter value.
4. To add more filters, click **+** and define another filter.
5. Click **Update** to search with the filters you defined.
6. To remove all filters, click **Clear All**.

View File Details and Error Log

You can view details of any imported data file. If there were problems with the file, you can view details of any validation errors in the error log.

1. In the **Import Data** dialog box on the Data Manager page, click a file name link. The **File Details** dialog box opens.

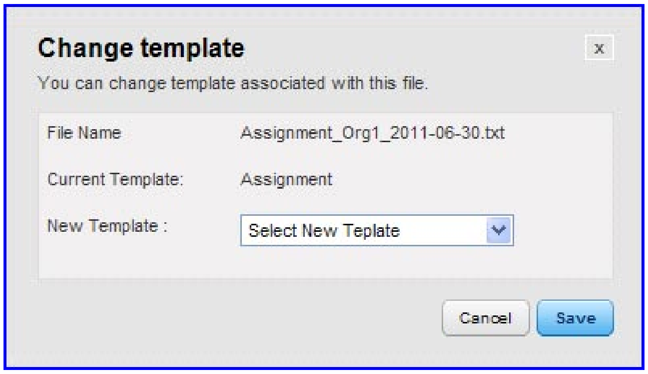


2. If validation failed, in the **Status** field click **Detailed Error Log**. A dialog box opens.
3. Choose whether to open or save the log file.
4. Review the log file for error information.

View or Change the File Template

You can change the file template associated with an uploaded template-based data file. You might need to do this if the file was originally uploaded using the wrong data template. When you change the template, the data file is reprocessed using the new template.

1. In the **Import Data** dialog box, find the template-based data file you want to reload.
2. To view the template associated with a template-based data file, click the **View Template** icon in the **Actions** column, and then choose whether to open or download the file. This is not available for assessment data files.
3. To change the template associated with a file, click the **Change Template** icon in the **Actions** column. The **Change Template** dialog box opens.



4. From the **New Template** list, select a new template.
5. Click **Save**. The **Import Data** dialog box opens, and the data file status is set to **Processing**.

Download a Data File

You can download any data files that have been imported into the system.

To download a data file, do the following:

1. In the **Import Data** dialog box, find the data file you want to download.
2. In the **Actions** column, click the **Download File** icon .
3. In the dialog box that opens, choose whether to open the file or to save it to a location on your computer.

Delete Imported Files

1. In the **Import Data** dialog box, in the far left column, select the check box for each file you want to delete. To select all files, select the check box in the column heading.
2. Click **Delete**. A confirmation message appears.
3. Click **Yes** to delete the selected file(s).

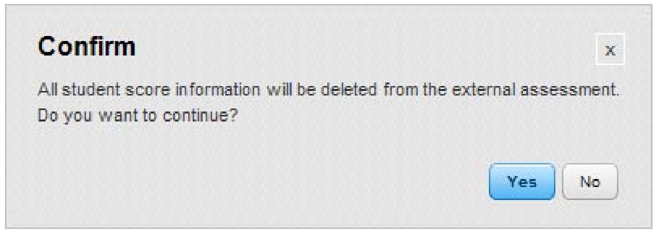
   Alternatively: To delete a specific file, in the **Actions** column, click the **Delete** icon .

Note: Deleting a data file does not remove the imported data from the system.

Erase Imported External Assessment Data

You can erase uploaded student score information for an external assessment from the database. You might need to do this if there was an error in the external assessment data you uploaded.

1. In the **Import Data** dialog box, find the data file you want to erase.
2. Click the **Erase Info** icon in the **Actions** column. A confirmation message appears, asking you to confirm that you want to delete the data.



3. Click **Yes**. The **Import Data** dialog box appears and the data file status is set to **Processing**. When the data has been erased, the status is set to **Data Cleared**.

View and Manage Scheduled Jobs

Note: The Data Manager feature is an optional module available only to IMS administrators. If you have questions about this feature, contact your system administrator for more information.

After you create a scheduled job (see Export Assessment Data), you can view job progress on the Scheduled Jobs page. Also, you can manage recurring jobs, delete jobs, and download exported assessment data after a scheduled job is processed.

View Scheduled Jobs

- On the Data Manager page, click **Scheduled Jobs**. The page displays all exported jobs you created and the corresponding status.

Manage Scheduled Jobs

The following tasks allow you to manage scheduled export jobs:

- To download the exported data from the Scheduled Jobs page, in the **Actions** column, click the **Download** icon , and then choose to open or save the XML file.
- To delete export jobs, in the **Actions** column, click **Delete**. You can also click the check box for the jobs you want to delete and click **Delete**.

Note: The exported jobs are displayed on the Scheduled Jobs page until you delete them.

- To search for a specific export job, type the name of the job in the **Search** field.
- To filter the list of export jobs that appear on the Scheduled Jobs page, click **Filters** and specify the filter criteria.
- To change the status of recurring jobs, use the **On/Off** toggle switch.

  Each recurring job on the Scheduled Jobs page includes an **On/Off** toggle button. After you create a recurring export job, set the status to **Off** to temporarily stop the scheduled export without deleting the job.

Note: By default, job status is set to **On**.

- To run an existing job again, in the **Actions** column, click the **Arrow** icon .

- To schedule a new job, click **Schedule More Reports**, and then follow the steps in Export Assessment Data.

Custom Pages & Menus

Custom Pages and Menus Overview

Note: The Custom Pages feature is available only to IMS administrators.

Custom Pages provide the ability to define which items display on a page and to assign different pages to staff, based on their assigned access rights. You can specify whether staff can add to their pages, or you can lock a page for consistency and ease of use. You can also create a combination that allows the addition of selected items and a lock on specific items.

After you create a custom page, there are two steps that allow access to the page you created. First, you add the new page to a template. Templates define the type of content and selected custom pages available for you to add to menus. The second step allows you to add the page as a menu item.

Types of Custom Pages

There are three types of custom pages:

- **Blank pages**: Provide a template for you to design a page with selected widgets, or web parts.
- **External web pages**: Allow you to add a URL that links to a website in a new window.

Note: If the external link includes other content, staff with access to the page can browse to the other content from within the context of the Pinnacle application.

- **Custom login pages**: You can modify the IMS login page by adding web parts, such as software training videos or educational documents. Anyone with access to the URL can view content you add, even if they do not have a login or password.

Custom Page Tasks

You can perform the following custom page tasks.

- Create a Custom Web Part Page
- Create a Custom External Web Page
- Manage Custom Pages

Manage Custom Pages

Note: The Custom Pages feature is available only to IMS administrators.

Custom page management includes the ability to edit, delete, or change the status of a page (**ON** is available, and **OFF** is not available).

Duplicate a Custom Page

Duplication allows you to create a new page using an existing page as a template. Duplicate an existing page and then edit it.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, click **Custom Pages**.
4. In the **Custom Pages** list, select the page you want to duplicate. (You can select multiple pages for duplication.)
5. On the toolbar, click **Duplicate**.
6. Click **Yes** to confirm the duplication. The page opens in edit mode.
7. Make appropriate changes and click **Finished** to save your new page.

Note: When you select multiple pages to duplicate, pages do not open in edit mode. Instead, a copy of each requested page appears at the bottom of the list with a title suffix that identifies it as a copy. To make edits, you must open each page by clicking the **Edit** icon .

Delete a Custom Page

You can delete any page that you create. Deleting a page removes it permanently. To remove the page from use without deleting it, change the status.

Perform this task from the appropriate **Custom Pages** list.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, click **Custom Pages**.
4. In the **Custom Pages** list, select the page you want to delete. (You can select multiple pages for deleting.)
5. On the toolbar, click **Delete Pages**.
6. Click **Yes** to confirm the delete.

   Alternatively: Locate the page you want to delete and, in the **Actions** column, click the **Delete** icon .

Change Page Status

Use page status to retain pages that you may need in the future, but want to restrict from current use. When a page's status is set to **Off**, the page cannot be added to a menu template and is not available for viewing. When a page's status is set to **On**, it is available for use. The difference between a status change and a deletion is that you can save a page for later use or reuse if you manipulate the status. A deleted page is permanently removed.

Note: You can change status only for pages created at your organizational level or a child of your organizational level.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, click **Custom Pages**.
4. In the **Custom Pages** list, locate the page you want to change and, in the **Actions** column:
    - Click **On** to change status to off.
    - Click **Off** to change status to on.

Edit a Page

You can edit any page you created or pages that fall within your organizational rights. If you do not see the **Edit** icon, you do not have rights to make changes.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, click **Custom Pages**.
4. In the **Custom Pages** list, locate the page you want to change and, in the **Actions** column, click the **Edit** icon .
5. Make appropriate changes and click **Finished**.

Manage the Portal Menu

You can use the portal menu to customize the top navigation bar to display only the options you want to use.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the pagebar, click **Menu**. The Menu page opens and lists the options that are viewable.
4. In the **Actions** column, click the **On/Off** switch for the options you want to be displayed or hidden.
5. Refresh your browser for the changes to take effect.

Create Custom Menus and Templates

Menus and templates work in association with Custom Pages. Pages define widgets or links displayed on a page. Templates define system default and custom page options available for menus. Menus define which options appear on which tabs or navigation menus for which roles. From menus, you create templates.

Once you complete the template, you can reorder, rename, and change status of menu options.

Create Menus

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Administration** section, click **Menu**.

   Alternatively: On the pagebar, click **Menu**.

4. Select the appropriate menu tab.

   Optional: Some selections require you to select a sub-menu.

Create Templates

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Administration** section, click **Menu**.

   Alternatively: On the pagebar, click **Menu**.On the toolbar, click **Create New Template**.

4. Type a **Template Name**.

   Optional steps:

   - Type a **Description**.
   - Click to set **Template Status** to **On**.

> **Note:** **Template Status** makes options available to menus. The default status is **Off**. This allows you to create templates that you can make available at a later date.

5. Click **Next** to open the **Conditions** tab. Conditions identify default template access.

> **Note**: At this point, you can click **Save Progress** at any time to save your custom page as a draft.

6. Select **Roles** for template access.
7. Select organization or **Classes** level for template access.
8. Select **Grades** for template access.
9. Select **Subjects** for template access.
10. On the toolbar, click **Next** to move to the **Pages and Applications** tab.
11. On the toolbar, click **Add More Pages** to add a custom page.

    Optional: Use drop-down fields to filter results prior to selection.

    a. Click **Add** for appropriate associated pages.

b. Click **Done** after you complete your selections.

Optional steps:

- Use **Order** drop-down fields to reorder selections.

Note: To ensure that the order you select here propagates down the organization hierarchy, click the **Lock** icon .

- Click **Rename** to change the option selection title.
- In the **Actions** column, click **On** to switch selection status to **Off** and remove the option from the menu without deleting it.

12. Click **Finished**. Your template appears as the last entry in the **Template Name** list.

Optional steps:

- In the **Actions** column, click **Off** to prevent association of the page with a menu. By default the **Action** is set to **On**.
- In the **Order** column, click the **Lock** icon to prevent changes to the template.

Create a Custom Web Parts Page

Web parts, or widgets, are small applications that you can embed within a web page. You can create two types of custom pages:

- **Web Parts**: Define objects that appear on a page.
- **External Web Pages**: Display an alternative site.

Note: The Custom Pages feature is available only to IMS administrators.

Create a Web Part (Widget) Page

Your selection affects the menu option under which the page is available.

Note: Newer software versions include the capability to rename tabs. You may see different menu names for your school.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Administration** section, click **Custom Pages**.

   Alternatively: On the pagebar, select **Custom Pages**.

4. Select a **Page Type**.
   - **User Pages**: Add custom pages to the **Home** tab.
   - **Class Pages**: Add custom pages to the **Classes** tab for teachers.
   - **Organization Pages**: Add custom pages to identified organization levels for administrators.
   - **Miscellaneous Pages**: Add custom pages to any tab.
   - **Login Pages**: Add custom page at login (content is available to everyone who can access the URL).

5. On the toolbar, click **Create New Page** and select **Blank** (web parts page).
6. Type a **Display Title**.

   Optional steps:

   - To select an icon that accompanies the page option on a menu, click the drop-down arrow to the left of **Display Title**.
   - Type a **Description**.
   - To identify the page in a filtered search, select **Grades** or **Subjects** filters.
7. On the toolbar, click **Next** to move to the **Layout** tab.

> **Note**: At this point, you can click **Save Progress** at any time to save your custom page as a draft.

8. On the toolbar, click **Add Web Parts**. Add appropriate web parts or widgets and supply content as appropriate. See Add Web Parts or Create Custom Widget for more information.

   For each object you add, the **Edit web part settings** dialog box opens.

   Optional step:

   - To ensure that the content you add cannot be changed and nothing can be added, select **Do not allow further changes to this web part**. This option does not appear for all web parts.
   - To ensure that the object cannot be removed, select **Make this web part mandatory**.
9. In the **Permissions** section, identify **View**, **Customize**, and **Delete** rights for identified staff roles.
10. Click **Done** to close the **Web Part** dialog box.
11. Repeat steps 7–10 until you have finished adding web parts.
12. Click **Done** to close the **Edit Web Part Settings** dialog box.
13. On the toolbar, click **Layout.**

    Optional steps:

    - Select **Do not allow web parts to be moved** to ensure that the content appears in the order you have defined.
    - Select **Do not allow column layout type to be modified**.
14. Select the column layout and click **Save**.

    Optional steps:

    - Drag and drop web parts to display in appropriate columns.
    - Click **Preview As**, select a **Role**, and click **Preview** to review your selections.
15. Click **Next** to move to the **Web Parts** tab.
16. Select appropriate options to identify if others can add web parts to the page.
    - **Disallow further add/remove of web parts:** Staff cannot add web parts to the page.

> **Note:** This includes adding a subsequent instance of an existing web part. For example, if you added a video to the layout, and you disallow changes, no one can add another video to the page.

- **Make all web parts available**.

- **Include only selected:** Opens a dialog box for you to identify specific web parts you allow as additions. Click **Add to list** for each web part and then click **Done** after you make all selections.
- **Exclude only selected:** Opens a dialog box for you to identify specific web parts restricted from additions. Click **Add to list** for each web part and then click **Done**.

17. Click **Next** to move to the **Permissions** tab.
18. Select a **Role** and assign appropriate rights for adding additional web parts.
    - **All**: Provides role with **View** and **Manage** permissions.
    - **View**: Provides role with view-only permissions to added web parts.
    - **Manage**: Provides role with permission to edit added web pages.
19. Click **Finished**. Your custom page appears as the last entry on the **Custom Pages** list.

    Optional: In the **Actions** column of the **Custom Pages** list, click **Off** to prevent association of the page with a menu.

Note: By default the **Action** is set to **On**.

Next, you add the page to a menu template. See Create Custom Menus and Templates for more information.

Create a Custom External Web Page

When you create a custom external web page and add it to a menu, anyone who has access to the menu can navigate to all available content the page provides. You can create two types of custom pages:

- **Web Parts**: Define objects that appear on a page.
- **External Web Pages**: Display an alternative website and apply pages by role.

Note: The Custom Pages feature is available only to IMS administrators.

Create a Custom External Web Page

Note: Newer software versions include the capability to rename tabs. You may see different tab names for your school.

1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, in the **Administration** section, click **Custom Pages**.

   Alternatively: On the pagebar, select **Custom Pages**.

4. Select a **Page Type**.
   - **User Pages**: Add custom pages to the Home tab.
   - **Class Pages**: Add custom pages to the **Classes** tab for teachers.
   - **Organization Pages**: Add custom pages to identified organization levels for administrators.
   - **Miscellaneous Pages**: Add custom pages to any tab.

- **Login Pages**: Add custom page at log in (content is available to everyone who can access the URL).

5. On the toolbar, click **Create New Page** and select **External Web Page**.
6. Type a **Display Title**.

   Optional steps:

   - To select an icon that accompanies the page option on a menu, click the drop-down arrow to the left of **Display Title**.
   - Type a **Description**.

7. Type the **URL** for your web site.

   Optional: To identify the page in a filtered search, select **Grades** or **Subjects** filters.

8. On the toolbar, click **Next** to move to the **Permissions** tab.

   Note: At this point, you can click **Save Progress** at any time to save your custom page as a draft.

9. Set appropriate permissions for each role.
   - **All**: Provides the selected role with **View**, **Edit**, and **Delete** permissions.
   - **View**: Provides the selected role with view-only permissions.
   - **Manage**: Provides the selected role with **Edit** and **Delete** permissions.
10. Click **Finished**. Your custom page appears as the last entry on the **Custom Pages** list.

    Optional: In the **Actions** column of the **Custom Pages** list, click **Off** to prevent association of the page with a menu.

    Note: By default the **Action** is set to **On**.

Next, add the page to a menu template. See Create Custom Menus and Templates for more information.

Create a Custom Login Page

Note: The Custom Pages feature is available only for IMS administrators, and the types of custom pages available are determined by assigned rights and school configuration. You may not have access to the login page option. See your IMS administrator for more information.

This feature allows you to modify your state, district, or school login pages. You can add content through the use of web parts just as you do for other custom pages. The difference for login pages is that anyone with access to the login URL can view the content you add, even if they do not have login credentials. Most often, custom login pages include public notices such as school athletic scores, weather reports for delayed start or cancelled school days, and school sponsored event criteria or awards information.

Note: If you include external links on the login page, remember that you do not have control over content or additional advertising links that may be available from the external site through your link.

Create a Custom Login Page

1. Sign in with administrative rights and, from the top navigation bar, click **Manage**.
2. In the navigation pane, select an appropriate district/school.
3. On the At A Glance page, scroll to **Administration** and click **Custom Pages**.

   Alternatively: Select **Custom Pages** from the pagebar.

4. From the **Page Type** list, select **Login Pages**.
5. Click **Create New Page**.
6. Type a **Display Title**.

   Optional: Click the drop-down arrow to the left of **Display Title** to select an icon that accompanies the page option on a menu.

   Optional: Type a **Description**.

7. On the toolbar, click **Next** to move to the **Layout** tab. The **Login** widget is a system default and cannot be removed.
8. On the toolbar, click **Add Web Parts**. Add appropriate web parts or widgets and supply content as appropriate. See Add Web Parts or Create Custom Widget for more information.

   For each object you add, the **Edit Web Part Settings** dialog box opens.

   Optional: Select **Do not allow further changes to this web part** to ensure the content you add cannot be changed and nothing can be added. This option does not appear for all web parts.

   Optional: Select **Make this web part mandatory** to ensure that the object cannot be removed.

9. Click **Done** to close the web part dialog box.
10. Repeat steps 8 and 9 until you have completed adding.
11. Click **Done** to close the **Edit Web Part Settings** dialog box.
12. On the toolbar, click **Layout**.

    Optional: Select **Do not allow web parts to be moved** to ensure the content appears in the order you have defined.

    Optional: Select **Do not allow column layout type to be modified**.

13. Select the column layout and click **Save**.

    Optional: Drag and drop web parts to display in appropriate columns.

    Optional: Click **Preview As**, select a **Role**, and click **Preview** to review your selections.

14. Click **Finished**. The custom login page appears at the bottom of the **Login Pages** list. Now, you must add the page to a menu template to make the page viewable. See Create a Custom Menu for more information.

Custom Widgets

Custom Widgets Overview

Note: The Custom Widgets feature is available only to IMS administrators.

A widget (also called a "web part" in some areas of the program) is a small application that can be installed within a web page. It provides a launch area for content you supply. Standard widgets are available from your home page.

Custom widgets allow IMS administrators to create on-screen tools, such as a calculator, clock, or daily weather report. You can also provide specific content (such as an online video). When you add a standard widget, you provide only the form and allow others to add content to the form; when you add a custom widget it includes the content.

Types of Widgets

There are five widget types available for IMS administrators to customize:

- **Online Audio/Podcast Widget**: Allows you to create a widget that plays an online audio or podcast.
- **Online Video Widget**: Allows you to create a widget that plays an online video, such as a YouTube video.
- **Online Document Widget**: Allows you to create a widget that displays an online document.
- **Article Widget**: Allows you to create a widget that displays text that you type (or copy and paste) and format.
- **Script/HTML Widget:** Allows you to create a widget that contains an application, such as a calculator, clock, or game. HTML Java scripts are supported for inclusion in this widget type.

Custom Widget Tasks

You can perform the following tasks when working with custom widgets.

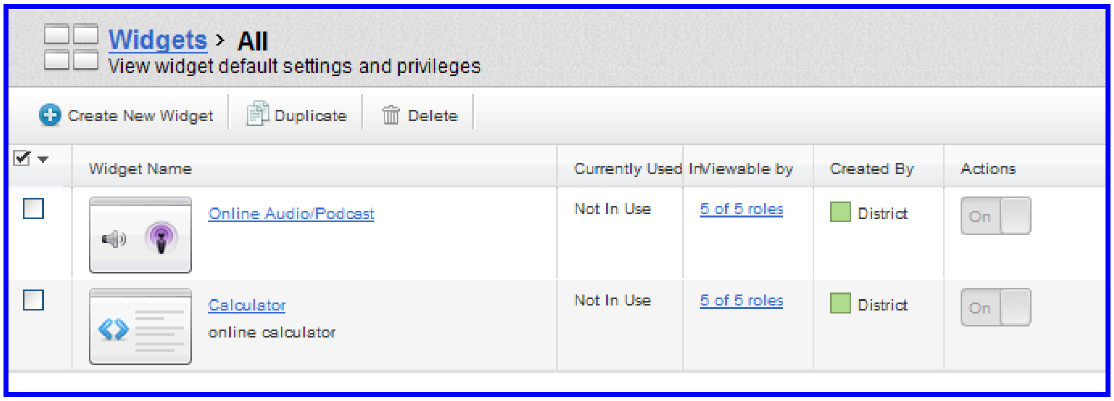
- Create a Widget
- Manage Custom Widgets

Create a Custom Widget

Custom widgets are small applications that include specific content, which you add to a custom page. Only IMS administrators can create custom widgets.

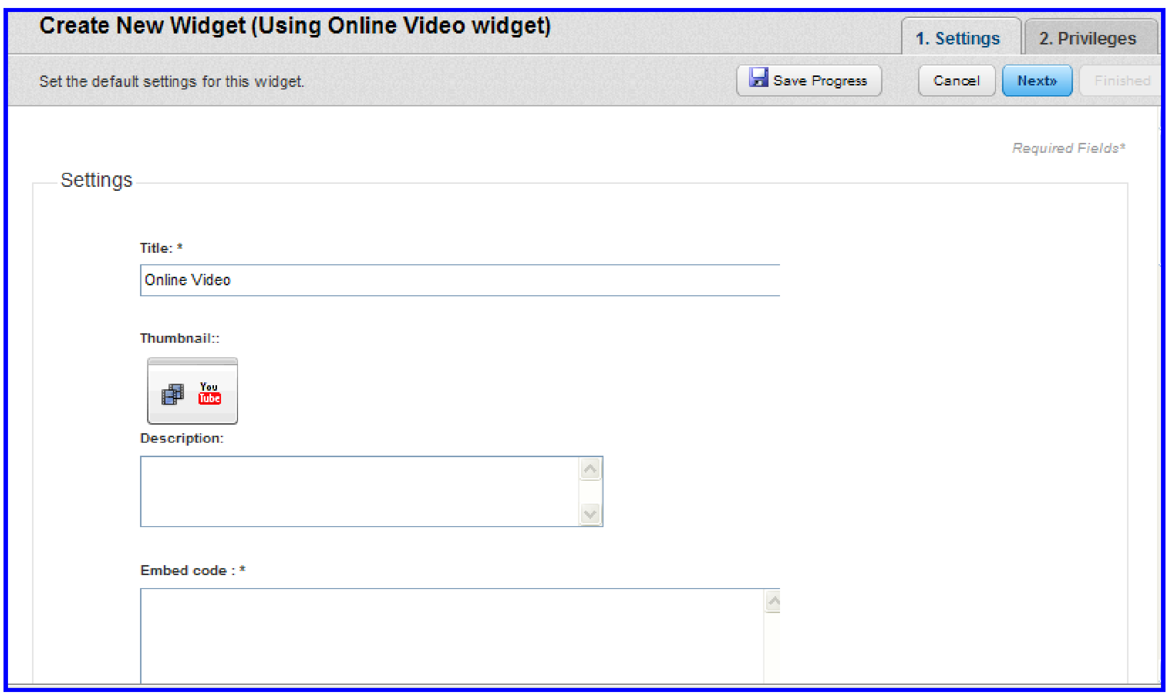
1. Sign in with administrative rights and, on the top navigation bar, click **Manage**.
2. In the left navigation pane, select the appropriate organizational level (district or school).
3. On the At A Glance page, in the **Administration** section, click **Widgets**.

   The Widgets All page opens and lists the custom widgets that have been created for the selected organization.



The Widgets page

4. Click **Create New Widget**.
5. Select a widget type from those listed and click **Use this widget**. The Create New Widget page opens with the **Settings** tab displayed.



The Create New Widget page

6. Type a **Title**.

   Optional steps:

   - Select a different representative icon. Each type of widget includes a default graphic that appears as an icon. To associate a different graphic with a custom widget, click the **Thumbnail** icon and select a new graphic from the list.
   - Type a **Description**.

7. Create content for the widget.
    - **For Online Audio/Podcast, Online Video, Online Document widgets**: Paste the embed code provided by the website into the **Embed Code** field.
    - **For Article widget**: Type and format the text you want to appear in the widget.
    - **For Script/HTML widget**: Provide the HTML/Script code for the widget.

    Optional steps:

    - To ensure that this information is not removed from the page, click **Make this web part mandatory**.
    - To ensure that your code is complete and renders the content correctly, click **Refresh Preview**.
    - To more easily identify the widget in search and filter functions, select one or more **Widget Tags**.
8. Click **Next** to display the Privileges page.
9. Set default privilege levels for each role. When an IMS administrator adds the widget to a custom page, the widget privileges match the settings selected here. The IMS administrator can change widget privileges with the Custom Pages feature.
10. Click **Finished**.

    The custom widget is created. You can add the widget to a page using the Custom Pages feature.

Manage Custom Widgets

Note: The Widgets feature is available only to IMS administrators.

You can create, edit, duplicate, and delete widgets from the Widgets page.

Create a Widget

There are two ways to create a new widget.

- Create by clicking **Create New Widget**, and follow steps in Create a Custom Widget
- Duplicate an existing widget and modify it to fit your needs.

Duplicate a Widget

1. Select the widget's check box and click **Duplicate**. This creates a copy of the selected widget.
2. Edit the duplicated widget to create a new one.

Edit a Widget

Click the **Edit** icon to change any widget characteristics.

Delete a Widget

You can delete any custom widgets you create.

- To delete a single widget, in the **Actions** column, click the **Delete** icon .
- To delete multiple widgets, select the check box for each widget and click **Delete**.

Note: The **Currently Used In** column on the Widgets page lists the number of pages where the widget was added. Use caution when deleting widgets that are in use; when you delete a custom widget, it is removed from all pages.

Activate a Widget

You do not have to delete a widget. You can deactivate it instead. Use the **On/Off** toggle in the **Actions** column. A widget in the **Off** state is not available to add to any page. If you set a widget to **Off**, and it is in use on a page, the widget no longer appears on the page. Set it to **On**, and the widget reappears on the page.

Appendix

Surveys

Surveys Overview

Administrators and teachers can gather feedback about classes, policies, new initiatives, or other relevant topics by creating and distributing surveys. Administrators can distribute surveys to teachers and administrators; teachers can distribute surveys to students.

After survey participants complete and submit a survey, you can view results in a graphical report.

Survey Tasks

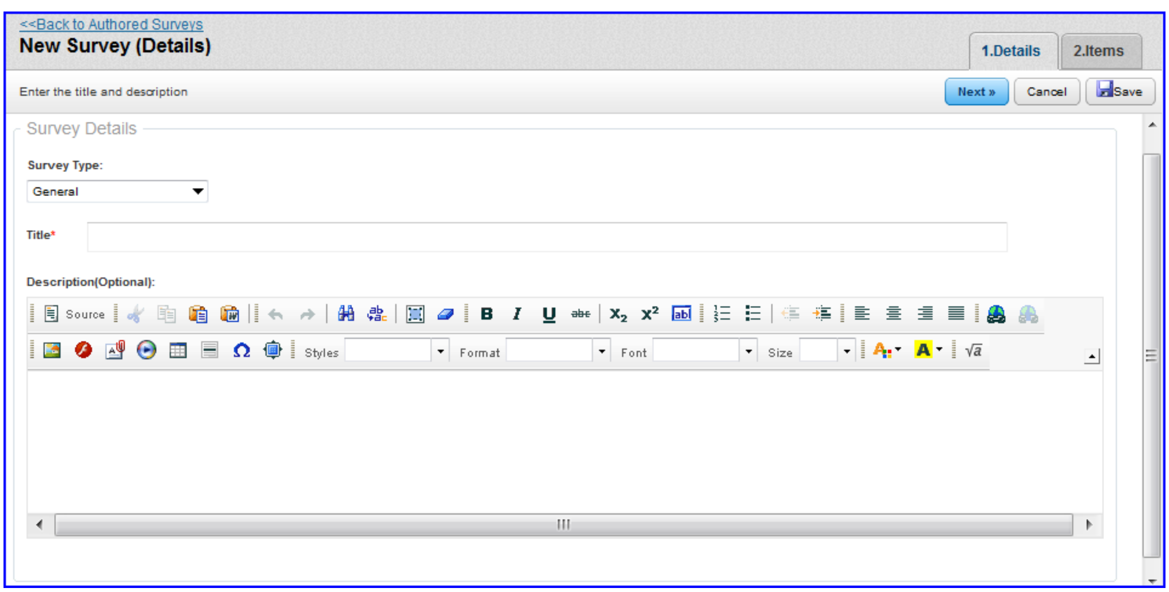
Refer to the following topics for step-by-step information.

- Create a Survey
- Complete a Survey
- View Survey Results

Create a Survey

Administrators or teachers can create surveys.

1. On the top navigation bar, click **Applications** and select **Surveys**.
2. In the navigation pane, select an organization.
3. Click **New Survey**. The New Survey page opens.



New Survey page

4. On the **Details** tab:
   - Select a **Survey Type**.
     - **General:** Use for groups other than Professional Development (PD).
     - **Professional Development:** Use for PD course participants or PD instructors.
   - Type a **Title**.
   - (*Optional*) Type a **Description**.
5. Click **Next**.
6. Click **Add Items** and select a survey item type.
   - MCQ (Multiple Choice)
   - True/False
   - Constructive Response (sentence-structured answers)
   - Quick Entry

   The **Create an Item** dialog box opens.
7. Create survey questions.
   - **Multiple Choice:** Click **Question Text** tab and type a survey question. Click **Answer Choices** tab and type one answer per cell (A,B,C...).
   - **True/False:** Click **Question Text** tab and type a survey question.
   - **Constructive Response:** Select **Response Size** (portion of page provided for response), and **Background (**lined or blank area for response). Optionally, you can add a **Response Image** to your survey question by clicking **Browse,** selecting an image, and clicking **Upload**. Then, click **Question Text** tab and type the survey question.
   - **Quick Entry:** Type the survey question and answer choices in the text box.
8. Click **Add** after each new survey question. Click **Add and Close** when finished. The Items page opens, listing all the survey questions you created.

   Optional: You can edit entries if needed, by clicking the **Edit** icon .
9. Click **Save**.

   Alternatively: Click **Distribute** to distribute the survey.

Note: For additional information about creating survey questions, see Create an Assessment.

Manage Surveys

You manage surveys from the Authored Surveys page. The surveys listed on the page are specific to the organization you select in the navigation pane. You can edit, delete, duplicate, and distribute surveys. The **Action** column provides access to tasks.

- Click the **Edit** icon to modify survey characteristics, including the name, questions and participants.
- Click the **Delete** icon to remove a survey.
- Click the **Duplicate** icon to create an identical survey. Once duplicated, you can edit to create a new survey.

- Click the **Distribute** icon to open the **Distribution List** window.

Note: You can distribute a survey multiple times to different participants.

Complete a Survey

1. Sign in and, on the top navigation bar, click **Applications** and then select **Surveys**. The Authored Surveys page opens.
2. Click the **Received** tab.
3. Click **Start** for a survey.
4. Answer the survey questions and click **Submit** when you have answered all the questions.

Note: If you cannot complete the entire survey at once, click **Save and Resume** to save your entries and complete the survey later. **Start** changes to **Resume** the next time you access the survey.

View Survey Results

After participants complete a survey, you can view results in a graphical report. A separate report is available for constructive response survey questions.

1. On the top navigation bar, click **Applications** and select **Surveys**.
2. On the navigation pane, select an organization.
3. Click the **Authored** tab.
4. Click the survey link under the **Distributed To** column. The Survey Details window opens, showing survey results on the **Results** tab.

   Alternatively: Click the survey name in the **Title** column, then click the **Results** tab.
5. Select **Distributed To** group from the drop-down. If you distributed to multiple groups, results are tallied for each distribution.
6. In the **Reports** drop-down list, select the type of report to view.

   Optional steps:

   - Click the **Details** tab to review the **Type**, **Title** and **Description** of the survey.
   - Click the **Preview** tab to see the participant's view of the survey.
   - Shortcut buttons are available to: duplicate, distribute, and delete the survey. See Create a Survey for more information on these functions.

Note: The survey results you see are specific to the class/organization selected in the navigation pane.

Glossary

A

Anecdotal Records: An informal, written record of a learner's progress based on milestones particular to the learner's social, emotional, physical, aesthetic, and cognitive development.

Assessment: An assessment is any task designed to measure. This term is commonly used to refer to testing, but general assignments can also be labeled, assessments as most assignments are designed to measure how well a student understands a concept. Pinnacle provides both activity and assessment formats. The current assessment format follows a conventional question/answer style of assessment.

Assignment: An assignment is a curriculum item (an activity or assessment) that has been scheduled for a class or student.

B

Best Practice: Objects identified with a thumb graphic designate vetted materials approved for organizational distribution.

C

CCL: Community Content Library.

Class: Classes refer to a specific group of students scheduled to meet at the same time in the same location assigned to one teacher (unless instruction time is shared or the class in online and meets in a virtual "same environment"). Classes can consist of one course section, a combination of sections, or a combination of courses and sections. (Such is the case when a younger advanced course shares instruction with an older general course. The instruction is the same, but the course identifiers are different for the different grades.)

Course: A course presents a defined focus of study. For example, a General Biology course should assess the same skill set regardless of the course section or the assigned instructor.

Curriculum: This term can refer to all instruction; however, it represents the highest level of instruction available in the IMS. Curriculum provides the overview for the grade and subject taught. Only IMS administrators can create or edit the top-level curricula. A curriculum level must exist before any other level of instruction (units, lessons, activities, or assessments) can be created in the IMS.

Community Content Library: The IMS allows teachers to share curriculum within their district through the Community Content Library. When you select to share your Unit, Activity, Lesson, or Assessment, it goes through the Peer Review process. It is then shared with other teachers through the Community Content Library.

F

Formative: Formative assessments are on-going reviews and observations. These provide feedback regarding a learner's progress. Formative assessments may include periodic quizzes and performance tasks, diagnostic tests, and anecdotal records.

O

Objectives: The terms Standards and Objectives are often used interchangeably, though they are not interchangeable ideas in the educational field of study. Both identify what a student should know or be able to do, but they differ in the level of detail and quality of measurement used. As a rule, standards are broader in description, and objectives are more detailed. Objectives are tied to lesson plans and several objectives may be applied to support one standard. Your school may use one term for all identified skills or your school may define skills at different levels. The IMS allows each school to make a decision regarding the organization and terminology to be used and the application allows you to tie skills to assignments and keep a separate record for standard/objective measurements.

P

PRT: Peer Review Team. This is a team of subject matter experts defined by IMS administrators to review curriculum and item bank objects prior to approval as best practice publication. This feature is not available for all schools.

S

Section: Sections allow courses to be offered at different times, by different instructors, and/or to different students. For example schools can use section numbers to divide courses among instructors, such that 9ENG01 meets with instructor A and 9ENG02 meets with instructor B. Sections are always related to courses, so the same skill set is assessed.

SIS: Student Information System (SIS) is an administrative application tool used to store and organize information, such as courses assigned to a teacher, students assigned to each course, student demographics, and teacher profiles. Information from this system is imported into PCA and Gradebook modules.

Standards: The terms "Standards" and "Objectives" are often used interchangeably, though they are not interchangeable ideas in the educational field of study. Both identify what a student should know or be able to do, but they differ in the level of detail and quality of measurement used. As a rule, standards are broader in description, and objectives are more detailed. Objectives are tied to lesson plans and several objectives may be applied to support one standard. Your school may use one term for all identified skills or your school may define skills at different levels. This application allows each school to make a decision regarding the organization and terminology to be used and allows you to tie skills to assignments and keep a separate record for standard/objective measurements.

Standards Entity: This is collection of academic standards created for different grade levels and subjects according to the identified authority. Often the authority is a state appointed committee; however, privately financed organizations also provide academic standards.

Summative: Summative assessments are used to evaluate effectiveness of an instructional program within a pre-determined period of time. The goal is to determine a learner's competency at the end of an instructional phase. Typical summative assessments include final exams, statewide tests (like the NECAP and RIAA), and entrance exams such at SAT or ACT as administered in the United States.

T

Term: Terms are pre-determined assessment time periods. Pinnacle Suite uses the general label, "Term" to avoid confusion among schools using different time period definitions. A term is also referred to as a "marking period." Some examples of common term labels are: 1st quarter, 2nd quarter, 1st semester, 1st trimester, 2nd trimester, 1st nine weeks, 2nd nine weeks, 1st six weeks.

U

Unrostered Student: An unrostered student is someone who is not enrolled in the class currently, but you anticipate the student will join your class. For a new student to be added to your class, you must contact your district IMS administrator.

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