Package 'eatATA'

July 6, 2021

Type Package

Title Create Constraints for Small Test Assembly Problems

Version 1.0.0

Description Provides simple functions to create constraints for small test assembly problems
(e.g. van der Linden (2005, ISBN: 978-0-387-29054-6)) using sparse matrices. Currently,
'GLPK', 'lpSolve', 'Symphony', and 'Gurobi' are supported as solvers. The 'gurobi' package is not available from
any mainstream repository; see <https://www.gurobi.com/downloads/>.

License GPL

URL https://github.com/beckerbenj/eatATA

Encoding UTF-8

LazyData true

Depends R (>= 3.5.0)

Imports Matrix,
methods,
Rglpk,
mathjaxr,
lpSolve

RoxygenNote 7.1.1

Suggests testthat (>= 2.1.0),
covr,
knitr,
rmarkdown,
readxl,
Rsymphony

Enhances gurobi

RdMacros mathjaxr

VignetteBuilder knitr

R topics documented:

acrossFormsConstraint *Constrain the sum of item values across multiple forms.*

Description

Create constraints related to item values. That is, the created constraints assure that the sum of the item values (itemValues) across test forms is either (a) smaller than or equal to (operator = "<="), (b) equal to (operator = "="), or (c) greater than or equal to (operator = ">=") the chosen targetValue. Note that the length of itemValues should equal to the number of the length of whichForms times whichItems.

Usage

```
acrossFormsConstraint(
  nForms,
  nItems = NULL,
  operator = c("<=", "=", ">="),
  targetValue,
  whichForms = seq_len(nForms),
  whichItems = NULL,
```

```
    itemIDs = NULL,
    itemValues = NULL,
    info_text = NULL
)
```

Arguments

nForms	Number of forms to be created.
nItems	Number of items in the item pool [optional to create itemIDs automatically].
operator	A character indicating which operator should be used in the constraints, with three possible values: "<=", "=", or ">=". See details for more information.
targetValue	the target value. The target sum of item values across test forms.
whichForms	An integer vector indicating across which test forms the sum should constrained. Defaults to all the test forms.
whichItems	A vector indicating which items should be constrained. Defaults to all the items.
itemIDs	a character vector of item IDs in correct ordering, or NULL.
itemValues	a vector of item values for which the sum across test forms should be constrained. The item values will be repeated for each form. Defaults to a vector with ones for all items in the pool.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting constraint-object.

Value

An object of class "constraint".

Examples

```
## constraints to make sure that accross test form 1 and 3, only 4 items
##  of items 1:10 appear. Note that the constraint should be used in
##  in combination with constraining item overlap between the forms.
combineConstraints(
  acrossFormsConstraint(nForms = 3,
                        operator = "=", targetValue = 4,
                        whichForms = c(1, 3),
                        itemValues = c(rep(1, 10), rep(0, 10)),
                        itemIDs = 1:20),
  itemUsageConstraint(nForms = 3, nItems = 20, operator = "=", targetValue = 1,
                      itemIDs = 1:20)
                 )

## or alternatively
combineConstraints(
  acrossFormsConstraint(nForms = 3, nItems = 20,
                        operator = "=", targetValue = 4,
                        whichForms = c(1, 3),
                        whichItems = 1:10,
                        itemIDs = 1:20),
  itemUsageConstraint(nForms = 3, nItems = 20, operator = "=", targetValue = 1,
                      itemIDs = 1:20)
                 )
```

---

analyzeBlockExclusion   *Analyze block exclusiveness*

Description

Use exclusion tuples information to determine which assembled test blocks are exclusive.

Usage

```
analyzeBlockExclusion(
  solverOut,
  items,
  idCol,
  exclusionTuples,
  formName = "form"
)
```

Arguments

solverOut	Object created by useSolver function.
items	Original data.frame containing information on item level.
idCol	Column name in items containing item IDs. These will be used for matching to the solver output.
exclusionTuples	
	data.frame with two columns, containing tuples with item IDs which should be in test forms exclusively. Must be the same object as used in itemExclusionConstraint.
formName	A character vector with names to give to the forms.

Details

If exclusion tuples have been used to assemble test forms (using the itemExclusionConstraint function), the resulting item blocks might also be exclusive. Using the initially used item exclusion tuples and the optimal solution given by useSolver this function determines, which item blocks are exclusive and can not be together in an assembled test form.

Value

A data.frame of block exclusions.

Examples

```
## Full workflow using itemExclusionTuples
# Example data.frame
items <- data.frame(ID = c("items1", "items2", "items3", "items4"),
                    exclusions = c("items2, items3", NA, NA, NA),
                    stringsAsFactors = FALSE)

# Create tuples
exTuples2 <- itemTuples(items = items, idCol = "ID", infoCol = "exclusions",
                    sepPattern = ", ")
```

```
#' ## Create constraints
exclusion_constraint <- itemExclusionConstraint(nForms = 2, itemTuples = exTuples2,
                                                itemIDs = items$ID)
depletion_constraint <- depletePoolConstraint(2, nItems = 4,
                                                itemIDs = items$ID)
target_constraint <- minimaxObjective(nForms = 2,
                                        itemValues = c(3, 1.5, 2, 4),
                                        targetValue = 1,
                                        itemIDs = items$ID)

opt_solution <- useSolver(list(exclusion_constraint, target_constraint,
                                depletion_constraint))

analyzeBlockExclusion(opt_solution, items = items, idCol = "ID",
                        exclusionTuples = exTuples2)
```

---

analyzeComplexBlockExclusion

Analyze complex block exclusiveness

Description

Use exclusion tuples information from independent test assembly problems to determine which assembled test blocks are exclusive.

Usage

```
analyzeComplexBlockExclusion(
  solverOut_list,
  items_list,
  idCol,
  exclusionTuples_list
)
```

Arguments

solverOut_list	List of objects created by useSolver.
items_list	List of original data.frame containing information on item level.
idCol	Column name in items containing item IDs. These will be used for matching to the solver output.
exclusionTuples_list	
	List of data.frames with two columns, containing tuples with item IDs which should be in test forms exclusively. Must be the same objects as used in itemExclusionConstraint.

Details

If exclusion tuples have been used to assemble test forms (using the itemExclusionConstraint function), the resulting item blocks might also be exclusive. Using the initially used item exclusion tuples and the optimal solution given by useSolver this function determines, which item blocks are exclusive and can not be together in an assembled test form. analyzeComplexBlockExclusion allows analyzing block exclusiveness from separate test assembly problems. This can be useful if test forms consist of blocks containing different domains or dimensions.

Value

A `data.frame` of block exclusions.

Examples

```
## Full workflow using itemExclusionTuples
# tbd
```

---

appendSolution   *Append a* `useSolver` *output*

Description

Append a `useSolver` output of a successfully solved optimization problem to the initial item pool `data.frame`.

Usage

```
appendSolution(solverOut, items, idCol)
```

Arguments

`solverOut`	Object created by `useSolver` function.
`items`	Original `data.frame` containing information on item level.
`idCol`	Column name or column number in `items` containing item IDs. These will be used for matching to the solver output.

Details

This function merges the initial item pool information in `items` to the solver output in `solverOut`.

Value

A `data.frame`.

Examples

```
## Example item pool
items <- data.frame(ID = 1:10,
itemValues = c(-4, -4, -2, -2, -1, -1, 20, 20, 0, 0))

## Test Assembly
usage <- itemUsageConstraint(nForms = 2, operator = "=",
                             targetValue = 1, itemIDs = items$ID)
perForm <- itemsPerFormConstraint(nForms = 2, operator = "=",
                                  targetValue = 5, itemIDs = items$ID)
target <- minimaxObjective(nForms = 2,
                           itemValues = items$itemValues,
                           targetValue = 0, itemIDs = items$ID)
sol <- useSolver(allConstraints = list(usage, perForm, target),
```

```
                                   solver = "lpSolve")

## Append Solution to existing item information
out <- appendSolution(sol, items = items, idCol = 1)
```

---

autoItemValuesMinMaxConstraint

Create single value constraints with minimum and maximum.

Description

[itemValuesDeviationConstraint](#) creates constraints related to an item parameter/value. autoItemValuesMixMax automatically determines the appropriate targetValue and then calls [itemValuesDeviationConstraint](#). The function only works for (dichotomous) dummy indicators with values 0 or 1.

Usage

```
autoItemValuesMinMaxConstraint(
  nForms,
  itemValues,
  testLength = NULL,
  allowedDeviation = NULL,
  relative = FALSE,
  verbose = TRUE,
  itemIDs = NULL
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
testLength	to be documented.
allowedDeviation	
	Numeric value of length 1. How much deviance is allowed from target values?
relative	Is the allowedDeviation expressed as a proportion?
verbose	Should calculated values be reported?
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Details

Two scenarios are possible when automatically determining the target value: (a) Either items with the selected property could be exactly distributed across test forms or (b) this is not possible. An example would be 2 test forms and 4 multiple choice items (a) or 2 test forms and 5 multiple choice items (b). If (a), the tolerance level works exactly as one would expect. If (b) the tolerance level is adapted, meaning that if tolerance level is 0 in example (b), allowed values are 2 or 3 multiple choice items per test form. For detailed documentation on how the minimum and maximum are calculated see also [computeTargetValues](#).

Value

A sparse matrix.

Examples

```
autoItemValuesMinMaxConstraint(2, itemValues = c(0, 1, 0, 1))
```

---

calculateExpectedRT   *Calculate Expected Response Times*

Description

Calculate expected response times given item parameters of the log normal response time model.

Usage

```
calculateExpectedRT(lambda, phi = rep(1, length(lambda)), zeta, sdEpsi)
```

Arguments

lambda	Vector of time intensity parameters.
phi	[optional] Vector of time sensitivity parameters.
zeta	Vector of person speed parameters.
sdEpsi	Vector of item specific residual variances.

Details

Expected response times are calculated according to the log normal response time model by van der Linden (2006) or Klein Entink et al. (2009). If phi is 1, the model by van der Linden (2006) is used. Either a single set of parameters of vectors of each parameters can be supplied.

The calculation is based on Fenton (1960). For the model by van der Linden (2006), the calculation was first introduced by van der Linden (2011).

Value

a matrix, with columns for different zeta and rows for different items

References

Fenton, L. (1960). The sum of log-normal probability distributions in scatter transmission systems. *IRE Transactions on Communication Systems*, 8, 57-67.

Klein Entink, R. H., Fox, J.-P., & van der Linden, W. J. (2009). A multivariate multilevel approach to the modeling of accuracy and speed of test takers. *Psychometrika*, 74(1), 21-48.

van der Linden, W. J. (2006). A lognormal model for response times on test items. *Journal of Educational and Behavioral Statistics, 31(2), 181-204.*

van der Linden, W. J. (2011). Test design and speededness. *Journal of Educational Measurement*, 48(1), 44-60.

Examples

```
# expected RT for a single item (van der Linden model)
calculateExpectedRT(lambda = 3.8, zeta = 0, sdEpsi = 0.3)

# expected RT for multiple items (van der Linden model)
calculateExpectedRT(lambda = c(4.1, 3.8, 3.5), zeta = 0,
                    sdEpsi = c(0.3, 0.4, 0.2))

# TIF for multiple items and multiple ability levels (1PL model)
calculateExpectedRT(lambda = c(3.7, 4.1, 3.8), phi = c(1.1, 0.8, 0.5),
                    zeta = c(-1, 0, 1), sdEpsi = c(0.3, 0.4, 0.2))
```

---

calculateIIF   *Calculate Item Information Function*

Description

Calculate item information function given item parameters of the 1PL, 2PL or 3PL IRT model.

Usage

```
calculateIIF(A = rep(1, length(B)), B, C = rep(0, length(B)), theta, D = 1.7)
```

Arguments

A	Vector of discrimination parameters.
B	Vector of difficulty parameters.
C	Vector of pseudo-guessing parameters.
theta	Vector of time intensity parameters.
D	the constant that should be used. Defaults to 1.7.

Value

a matrix, with columns for different theta and rows for different items

References

van der Linden, W. J. (2005). *Linear models for optimal test design*. New York, NY: Springer.

Examples

```
# TIF for a single item (2PL model)
calculateIIF(A = 0.8, B = 1.1, theta = 0)

# TIF for multiple items (1PL model)
calculateIIF(B = c(1.1, 0.8, 0.5), theta = 0)

# TIF for multiple theta-values (3PL model)
calculateIIF(B = -0.5, C = 0.25, theta = c(-1, 0, 1))

# TIF for multiple items and multiple ability levels (2PL model)
```

```
calculateIIF(A = c(0.7, 1.1, 0.8), B = c(1.1, 0.8, 0.5),
             theta = c(-1, 0, 1))
```

---

cappedMaximinObjective

CappedMaximin Constraint.

Description

Create `maximin`-constraints related to an item parameter/value. That is, the created constraints can be used to maximize the minimal sum of the item values (`itemValues`), while at the same time automatically setting an ideal upper limit to the overflow. More specifically, the `capped minimax` method described by Luo (2020) is used.

Usage

```
cappedMaximinObjective(
  nForms,
  itemValues,
  weight = 1,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
weight	a weight for the real-valued variable(s). Useful when multiple constraints are combined. Should only be used if the implications are well understood.
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the `"info"`-attribute of the resulting `constraint`-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

An object of class `"constraint"`.

References

Xiao Luo (2020). Automated Test Assembly with Mixed-Integer Programming: The Effects of Modeling Approaches and Solvers. *Journal of Educational Measurement*, 57(4), 547-565. `https://onlinelibrary.wiley.com/doi/10.1111/jedm.12262`

Examples

```
# constraint that minimizes the maximum difference per test form value and a
#   target value of 0
cappedMaximinObjective(nForms = 2, itemValues = rep(-2:2, 2))
```

---

combineConstraints   *Combine constraints*

Description

Combine multiple constraint-objects into one constraint object.

Usage

```
combineConstraints(..., message = TRUE)
```

Arguments

...	multiple constraint-objects or a list with multiple constraint-objects
message	A logical indicating whether a message should be given when only one constraint object is combined.

Value

A data.frame of block exclusions.

Examples

```
combineConstraints(
 itemValuesConstraint(2, 1:10, operator = ">=", targetValue = 4),
 itemValuesConstraint(2, 1:10, operator = "<=", targetValue = 6)
)
```

---

computeTargetValues   *Compute target values based on the item pool.*

Description

Compute target values for item values/categories based on the number of items in the item pool, the number of test forms to assemble and the number of items in each test form (i.e., test length).

Usage

```
computeTargetValues(
  itemValues,
  nForms,
  testLength = NULL,
  allowedDeviation = NULL,
  relative = FALSE
)

## Default S3 method:
computeTargetValues(
  itemValues,
  nForms,
  testLength = NULL,
  allowedDeviation = NULL,
  relative = FALSE
)

## S3 method for class 'factor'
computeTargetValues(
  itemValues,
  nForms,
  testLength = NULL,
  allowedDeviation = NULL,
  relative = FALSE
)
```

Arguments

`itemValues`	Item parameter/values for which the sum per test form should be constrained.
`nForms`	Number of forms to be created.
`testLength`	to be documented.
`allowedDeviation`	
	Numeric value of length 1. How much deviance is allowed from target values?
`relative`	Is the `allowedDeviation` expressed as a proportion?

Details

Both for numerical and categorical item values, the target values are the item pool average scaled by the ratio of items in the forms and items in the item pool. The behavior of the function changes depending on the class of `itemValues`.

When `itemValues` is a numerical vector, an when `allowedDeviation` is NULL (the default), only one target value is computed. This value could be used in the `targetConstraint`-function. Otherwise (i.e., allowedDeviation is a numerical value), the target is computed, but a minimal and a maximal (target)value are returned, based on the allowed deviation. When `relative == TRUE` the allowed deviation should be expressed as a proportion. In that case the minimal and maximal values are a computed proportionally.

When `itemValues` is a `factor`, it is assumed that the item values are item categories, and hence only whole valued frequencies are returned. To be more precise, a matrix with the minimal and maximal target frequencies for every level of the factor are returned. When `allowedDeviation` is

NULL, the difference between the minimal and maximal value is one (or zero). As a consequence, dummy-item values are best specified as a factor (see examples).

Value

a vector or a matrix with target values (see details)

Methods (by class)

- default: compute target values
- factor: compute target frequencies for item categories

Examples

```
## Assume an item pool with 50 items with random item information values (iif) for
## a given ability value.
set.seed(50)
itemInformations <- runif(50, 0.5, 3)

## The target value for the test information value (i.e., sum of the item
## informations) when three test forms of 10 items are assembled is:
computeTargetValues(itemInformations, nForms = 3, testLength = 10)

## The minimum and maximum test iformation values for an allowed deviation of
## 10 percent are:
computeTargetValues(itemInformations, nForms = 3, allowedDeviation = .10,
   relative = TRUE, testLength = 10)


## items_vera$MC is dummy variable indication which items in the pool are multiple choise
str(items_vera$MC)

## when used as a numerical vector, the dummy is not treated as a categorical
## indicator, but rather as a numerical value.
computeTargetValues(items_vera$MC, nForms = 14)
computeTargetValues(items_vera$MC, nForms = 14, allowedDeviation = 1)

## Therefore, it is best to convert dummy variables into a factor, so that
## automatically freqyencies are returned
MC_factor <- factor(items_vera$MC, labels = c("not MC", "MC"))
computeTargetValues(MC_factor, nForms = 14)
computeTargetValues(MC_factor, nForms = 3)

## The computed minimum and maximum frequencies can be used to create contstraints.
MC_ranges <- computeTargetValues(MC_factor, nForms = 3)
itemCategoryRangeConstraint(3, MC_factor, range = MC_ranges)

## When desired, the automatically computed range can be adjusted by hand. This
##  can be of use when only a limited set of the categories should be constrained.
##  For instance, when only the multiple-choice items should be constrained, and
##  the non-multiple-choice items should not be constrained, the minimum and
##  maximum value can be set to a very small and a very high value, respectively.
##  Or to other sensible values.
MC_ranges["not MC", ] <- c(0, 40)
MC_ranges
itemCategoryRangeConstraint(3, MC_factor, range = MC_ranges)
```

---

depletePoolConstraint   *Use complete item pool.*

Description

Creates constraints that assure that every item in the item pool is used (at least) once. Essentially a wrapper around itemUsageConstraint.

Usage

```
depletePoolConstraint(nForms, nItems = NULL, itemIDs = NULL)
```

Arguments

nForms	Number of forms to be created.
nItems	Number of items in the item pool [optional to create itemIDs automatically].
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

A sparse matrix.

Examples

```
depletePoolConstraint(2, itemIDs = 1:10)
```

---

dummiesToFactor   *Convert dummy variables to factor.*

Description

Convert multiple dummy variables into a single factor variable.

Usage

```
dummiesToFactor(dat, dummies, facVar, nameEmptyCategory = "_none_")
```

Arguments

dat	A data.frame.
dummies	Character vector containing the names of the dummy variables in the data.frame.
facVar	Name of the factor variable, that should be created.
nameEmptyCategory	a character of length 1 that defines the name of cases for which no dummy is equal to one.

Details

The content of a single factor variable can alternatively be stored in multiple dichotomous dummy variables coded with 0/1 or NA/1. 1 always has to refer to "this category applies". The function requires factor levels to be exclusive (i.e. only one factor level applies per row.).

Value

A data.frame containing the newly created factor.

Examples

```
# Example data set
tdat <- data.frame(ID = 1:3, d1=c(1, 0, 0), d2 = c(0, 1, 0), d3 = c(0, 0, 1))

dummiesToFactor(tdat, dummies = c("d1", "d2", "d3"), facVar = "newFac")
```

---

inspectSolution	*Inspect a* useSolver *output*

Description

Process a useSolver output of a successfully solved optimization problem to a list so it becomes humanly readable.

Usage

```
inspectSolution(
  solverOut,
  items,
  idCol,
  colNames = names(items),
  colSums = TRUE
)
```

Arguments

solverOut	Object created by useSolver function.
items	Original data.frame containing information on item level.
idCol	Column name in items containing item IDs. These will be used for matching to the solver output.
colNames	Which columns should be used from the items data.frame?
colSums	Should column sums be calculated in the output? Only works if all columns are numeric.

Details

This function merges the initial item pool information in items to the solver output in solverOut. Relevant columns can be selected via colNames. Column sums within test forms are calculated if possible and if colSum is set to TRUE.

Value

A list with assembled blocks as entries. Rows are the individual items. A final row is added, containing the sums of each column.

Examples

```
## Example item pool
items <- data.frame(ID = 1:10,
itemValues = c(-4, -4, -2, -2, -1, -1, 20, 20, 0, 0))

## Test Assembly
usage <- itemUsageConstraint(nForms = 2, operator = "=",
                             targetValue = 1, itemIDs = items$ID)
perForm <- itemsPerFormConstraint(nForms = 2, operator = "=",
                                  targetValue = 5, itemIDs = items$ID)
target <- minimaxObjective(nForms = 2,
                           itemValues = items$itemValues,
                           targetValue = 0, itemIDs = items$ID)
sol <- useSolver(allConstraints = list(usage, perForm, target),
                 solver = "lpSolve")

## Inspect Solution
out <- inspectSolution(sol, items = items, idCol = 1, colNames = "itemValues")
```

---

itemCategoryConstraint

Create item category constraints.

Description

Create constraints related to item categories/groupings (as represented by itemCategories). That is, the created constraints assure that the number of items of each category per test form is either (a) smaller or equal than (operator = "<="), (b) equal to (operator = "="), or (c) greater than or equal to (operator = ">=") the corresponding targetValues.

Usage

```
itemCategoryConstraint(
  nForms,
  itemCategories,
  operator = c("<=", "=", ">="),
  targetValues,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemCategories)
)
```

Arguments

nForms   Number of forms to be created.

itemCategories a factor representing the categories/grouping of the items

operator	A character indicating which operator should be used in the constraints, with three possible values: `"<="`, `"="`, or `">="`. See details for more information.
targetValues	an integer vector representing the target number per category. The order of the target values should correspond with the order of the levels of the factor in `itemCategory`.
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the `"info"`-attribute of the resulting `constraint`-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

A object of class `"constraint"`.

Examples

```
## constraints to make sure that there are at least 3 items of each item type
## in each test form
nItems <- 30
item_type <- factor(sample(1:3, size = nItems, replace = TRUE))
itemCategoryConstraint(2, item_type, ">=", targetValues = c(1, 3, 2))
```

---

itemCategoryRangeConstraint

Create item category constraints with minimum and maximum.

Description

`itemCategoriesRange`, `itemCategoriesMin`, and `itemCategoriesMax` create constraints related to item categories/groupings (as represented by `itemCategories`). That is, the created constraints assure that the number of items of each category per test form is either smaller or equal than the specified `max`, greater than or equal to `min` or both `range`.

Usage

```
itemCategoryRangeConstraint(
  nForms,
  itemCategories,
  range,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemCategories)
)

itemCategoryMinConstraint(
  nForms,
  itemCategories,
  min,
  whichForms = seq_len(nForms),
```

```
  info_text = NULL,
  itemIDs = names(itemCategories)
)

itemCategoryMaxConstraint(
  nForms,
  itemCategories,
  max,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemCategories)
)

itemCategoryDeviationConstraint(
  nForms,
  itemCategories,
  targetValues,
  allowedDeviation,
  relative = FALSE,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemCategories)
)
```

Arguments

nForms	Number of forms to be created.
itemCategories	a factor representing the categories/grouping of the items
range	a matrix with two columns representing the the minimal and the maximum frequency of the items from each level/category itemCategories
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting constraint-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.
min	the minimal sum of the itemValues per test form
max	the minimal sum of the itemValues per test form
targetValues	an integer vector representing the target number per category. The order of the target values should correspond with the order of the levels of the factor in itemCategory.
allowedDeviation	the maximum allowed deviation from the targetValue
relative	a logical expressing whether or not the allowedDeviation should be interpreted as a proportion of the targetValue

Details

itemCategoriesDeviation also constrains the minimal and the maximal value of the number of items of each category per test form, but based on chosen targetValues, and maximal allowed deviations (i.e., allowedDeviation) from those targetValues.

Value

A sparse matrix.

Functions

- `itemCategoryMinConstraint`: constrain minimum value
- `itemCategoryMaxConstraint`: constrain maximum value
- `itemCategoryDeviationConstraint`: constrain the distance form the `targetValues`

Examples

```
## constraints to make sure that there are at least 2 and maximally 4
##  items of each item type in each test form
nItems <- 30
item_type <- factor(sample(1:3, size = nItems, replace = TRUE))
itemCategoryRangeConstraint(2, item_type, range = cbind(min = rep(2, 3), max = rep(4, 3)))

## or alternatively
itemCategoryDeviationConstraint(2, item_type,
targetValues = rep(3, 3),
allowedDeviation = rep(4, 3))
```

---

itemExclusionConstraint

Create item inclusion or exclusion constraints.

Description

Create constraints that prohibit that item pairs occur in the same test forms (exclusions) or force item pairs to be in the same test forms (inclusions).

Usage

```
itemExclusionConstraint(
  nForms,
  itemTuples,
  itemIDs,
  whichForms = seq_len(nForms),
  info_text = NULL
)

itemInclusionConstraint(
  nForms,
  itemTuples,
  itemIDs,
  whichForms = seq_len(nForms),
  info_text = NULL
)
```

Arguments

`nForms`	Number of forms to be created.
`itemTuples`	`data.frame` with two columns, containing tuples with item IDs which should be in test forms inclusively or exclusively.
`itemIDs`	Character vector of item IDs in correct ordering.
`whichForms`	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
`info_text`	a character string of length 1, to be used in the `"info"`-attribute of the resulting `constraint`-object.

Details

Item tuples can, for example, be created by the function [itemTuples](#).

Value

An object of class `"constraint"`.

Functions

  - `itemExclusionConstraint`: item pair exclusion constraints
  - `itemInclusionConstraint`: item pair inclusion constraints

Examples

```
## Simple Exclusion Example
# item-IDs
IDs <- c("item1", "item2", "item3", "item4")

# exclusion tuples: Item 1 can not be in the test form as item 2 and 3
exTuples <- data.frame(v1 = c("item1", "item1"), v2 = c("item2", "item3"),
                       stringsAsFactors = FALSE)
# inclusion tuples: Items 2 and 3 have to be in the same test form
inTuples <- data.frame(v1 = c("item2"), v2 = c("item3"),
                       stringsAsFactors = FALSE)

# create constraints
itemExclusionConstraint(nForms = 2, itemTuples = exTuples, itemIDs = IDs)
itemInclusionConstraint(nForms = 2, itemTuples = inTuples, itemIDs = IDs)


########
## Full workflow for exclusions using itemTuples
# Example data.frame
items <- data.frame(ID = c("item1", "item2", "item3", "item4"),
                    infoCol = c("item2, item3", NA, NA, NA))

# Create tuples
exTuples2 <- itemTuples(items = items, idCol = "ID", infoCol = "infoCol",
                    sepPattern = ", ")

## Create constraints
itemExclusionConstraint(nForms = 2, itemTuples = exTuples2, itemIDs = IDs)
```

itemsPerFormConstraint

Create number of items per test form constraints.

Description

Creates constraints related to the number of items in each test form.

Usage

```
itemsPerFormConstraint(
  nForms,
  nItems = NULL,
  operator = c("<=", "=", ">="),
  targetValue,
  whichForms = seq_len(nForms),
  itemIDs = NULL
)
```

Arguments

nForms	Number of forms to be created.
nItems	Number of items in the item pool [optional to create `itemIDs` automatically].
operator	A character indicating which operator should be used in the constraints, with three possible values: `"<="`, `"="`, or `">="`. See details for more information.
targetValue	The target value to be used in the constraints. That is, the number of items per form.
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Details

The number of items per test form is constrained to be either (a) smaller or equal than (`operator = "<="`), (b) equal to (`operator = "="`), or (c) greater or equal than (`operator = ">="`) the chosen value.

Value

An object of class `"constraint"`.

Examples

```
## Constrain the test forms to have exactly five items
itemsPerFormConstraint(3, operator = "=", targetValue = 5,
                       itemIDs = 1:20)
```

---

items_diao   *Small simulated item pool example.*

Description

A `data.frame` containing 165 items calibrated using a 3PL model. This item pool is analogous to one of the item pools used in Diao & van der Linden (2011).

Usage

```
items_diao
```

Format

A `data.frame` .

item Item identifier.
a Discrimination parameter.
b Difficulty parameter.
c Pseudo-guessing parameter.
category Content category.

References

Diao, Q. & van der Linden, W.J. (2011). Automated test assembly using lp_solve version 5.5 in R. *Applied Psychological Measurement, 35 (5)*, 398-409.

---

items_lsa   *Simulated item pool example.*

Description

A `data.frame` containing 209 calibrated items with different categorical and metric properties, comparable to an item pool from a large-scale assessment.

Usage

```
items_lsa
```

Format

A `data.frame` .

testlet Testlet identifier (items in the same testlet share a common stimulus.
item Item identifier.
level Competence level.
format Item format.
frequency Solution frequency.
infit Item infit.
time Average response time in seconds.
anchor Is the item an anchor item?

---

items_mini   *Small simulated item pool example.*

Description

A `data.frame` containing 30 items with different categorical and metric properties.

Usage

    items_mini

Format

A `data.frame` .

item Item identifier.

format Item format (e.g., multiple choice, open answer, order item).

time Average response time in seconds.

difficulty IRT difficulty parameter.

---

items_pilot   *Small simulated item pool example.*

Description

A `data.frame` containing 100 not yet calibrated items with different categorical and metric properties.

Usage

    items_pilot

Format

A `data.frame` .

item Item identifier.

diffCategory Item difficulty (five categories).

format Item format (multiple choice, constructed multiple choice, or open answer).

domain Item domain (listening, reading, or writing).

time Average response times in seconds.

exclusions Items which can not be in the same test form.

---

items_vera   *Small artificial item pool example.*

Description

A `data.frame` containing 80 items with different categorical and metric properties.

Usage

    items_vera

Format

A `data.frame` .

item Item identifier.

exclusions Items which can not be in the same test form.

time Average response times in minutes. `2.5` equals 2 minutes and 30 seconds, for example.

subitems Number of sub items.

MC, CMC, short_answer, open Answer formats.

diff_1, diff_2, diff_3, diff_4, diff5 Difficulty categories.

---

itemTuples   *Create item tuples.*

Description

If item inclusions or exclusions are stored as a character vector, `itemTuples` separates this vector and creates item pairs ('tuples').

Usage

    itemTuples(items, idCol = "ID", infoCol, sepPattern = ", ")

Arguments

items	A `data.frame` with information on an item pool.
idCol	character or integer indicating the item ID column in `items`.
infoCol	character or integer indicating the column in `items` which contains information on the tuples.
sepPattern	String which should be used for separating item IDs in the `infoCol` column.

Details

Tuples can be used by [itemExclusionConstraint](#) to set up exclusion constraints and by [itemInclusionConstraint](#) to set up inclusion constraints. Note that a separator pattern has to be used consistently throughout the column (e.g. `", "`).

Value

A `data.frame` with two columns.

Examples

```
# Example data.frame
items <- data.frame(ID = c("item1", "item2", "item3", "item4"),
                    exclusions = c("item2, item3", NA, NA, NA))

# Create tuples
itemTuples(items = items, idCol = "ID", infoCol = 2,
                    sepPattern = ", ")
```

---

itemUsageConstraint   *Create item usage constraints.*

Description

Creates constraints related to item usage. That is, the number of times an item is selected is constrained to be either (a) smaller or equal than (operator = "<="), (b) equal to (operator = "="), or (c) greater or equal than (operator = ">=") the chosen `value`.

Usage

```
itemUsageConstraint(
  nForms,
  nItems = NULL,
  formValues = rep(1, nForms),
  operator = c("<=", "=", ">="),
  targetValue = 1,
  whichItems = NULL,
  info_text = NULL,
  itemIDs = NULL
)
```

Arguments

nForms	Number of forms to be created.
nItems	Number of items in the item pool [optional to create `itemIDs` automatically].
formValues	vector with values or weights for each form. Defaults to 1 for each form.
operator	A character indicating which operator should be used in the constraints, with three possible values: "<=", "=", or ">=". See details for more information.
targetValue	The value to be used in the constraints
whichItems	A vector indicating which items should be constrained. Defaults to all the items.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting `constraint`-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Details

When operator = ”<=” and value = 1 (the default), each item can be selected maximally once, which corresponds with assuring that there is no item overlap between the forms. When operator = ”=” and value = 1, each item is used exactly once, which corresponds to no item-overlap and complete item pool depletion.

If certain items are required in the resulting test form(s), as for example anchor items, whichItems can be used to constrain the usage of these items to be exactly 1. whichItems can either be a numeric vector with item numbers or a character vector with item identifiers corresponding to itemIDs.

Value

An object of class ”constraint”.

Examples

```
## create no-item overlap constraints with item pool depletion
##  for 2 test forms with an item pool of 20 items
itemUsageConstraint(2, operator = "=", targetValue = 1,
                    itemIDs = 1:20)

## force certain items to be in the test, others not
usage1 <- itemUsageConstraint(2, operator = "<=", targetValue = 1,
                    itemIDs = paste0("item", 1:20))
usage2 <- itemUsageConstraint(2, operator = "=", targetValue = 1,
                    itemIDs = paste0("item", 1:20),
                    whichItems = c("item5", "item8", "item10"))
```

---

itemValuesConstraint   *Constrain the sum of item values per form.*

Description

Create constraints related to an item parameter/value. That is, the created constraints assure that the sum of the item values (itemValues) per test form is either (a) smaller than or equal to (operator = ”<=”), (b) equal to (operator = ”=”), or (c) greater than or equal to (operator = ”>=”) the chosen targetValue.

Usage

```
itemValuesConstraint(
  nForms,
  itemValues,
  operator = c("<=", "=", ">="),
  targetValue,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

`nForms`	Number of forms to be created.
`itemValues`	Item parameter/values for which the sum per test form should be constrained.
`operator`	A character indicating which operator should be used in the constraints, with three possible values: `"<="`, `"="`, or `">="`. See details for more information.
`targetValue`	the target test form value.
`whichForms`	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
`info_text`	a character string of length 1, to be used in the `"info"`-attribute of the resulting `constraint`-object.
`itemIDs`	a character vector of item IDs in correct ordering, or NULL.

Details

When `operator` is `"<="`, the constraint can be mathematically formulated as:

$$\sum_{i=1}^{I} v_i \times x_{if} \leq t, \quad \text{for } f \in G,$$

where I refers to the number of items in the item pool, v_i is the `itemValue` for item i and t is the `targetValue`. Further, G corresponds to `whichForms`, so that the above inequality constraint is repeated for every test form f in G. In addition, let $\boldsymbol{x}$ be a vector of binary decision variables with length $I \times F$, where F is `nForms`. The binary decision variables x_{if} are defined as:

$$x_{if} = 1, \quad \text{if item } i \text{ is assigned to form } f, \text{ and}$$
$$x_{if} = 0, \quad \text{otherwise.}$$

Value

An object of class `"constraint"`.

Examples

```
## constraints to make sure that the sum of the item values (1:10) is between
## 4 and 6
combineConstraints(
  itemValuesConstraint(2, 1:10, operator = ">=", targetValue = 4),
  itemValuesConstraint(2, 1:10, operator = "<=", targetValue = 6)
)
```

---

itemValuesRangeConstraint

Create single value constraints with minimum and maximum.

Description

`itemValuesRangeConstraint`, `itemValuesMinConstraint`, and `itemValuesMaxConstraint` create constraints related to an item parameter/value. That is, the created constraints assure that the sum of the `itemValues` is smaller than or equal to `max`, greater than or equal to `min`, or both `range`.

Usage

```
itemValuesRangeConstraint(
  nForms,
  itemValues,
  range,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)

itemValuesMinConstraint(
  nForms,
  itemValues,
  min,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)

itemValuesMaxConstraint(
  nForms,
  itemValues,
  max,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)

itemValuesDeviationConstraint(
  nForms,
  itemValues,
  targetValue,
  allowedDeviation,
  relative = FALSE,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
range	a vector with two values, the the minimal and the maximum sum of the `itemValues` per test form, respectively
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting `constraint`-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.
min	the minimal sum of the `itemValues` per test form

max	the minimal sum of the `itemValues` per test form
targetValue	the target test form value.
allowedDeviation	
	the maximum allowed deviation from the `targetValue`
relative	a logical expressing whether or not the `allowedDeviation` should be interpreted as a proportion of the `targetValue`

Details

`itemValuesDeviationConstraint` also constrains the minimal and the maximal value of the sum of the `itemValues`, but based on a chosen and a maximal allowed deviation (i.e., `allowedDeviation`) from that `targetValue`.

Value

An object of class `"constraint"`.

Functions

- `itemValuesMinConstraint`: constrain minimum value

- `itemValuesMaxConstraint`: constrain maximum value

- `itemValuesDeviationConstraint`: constrain the distance form the `targetValue`

Examples

```
## constraints to make sure that the sum of the item values (1:10) is between
## 4 and 6
itemValuesRangeConstraint(2, 1:10, range(min = 4, max = 6))

## or alternatively
itemValuesDeviationConstraint(2, 1:10, targetValue = 5,
allowedDeviation = 1)
```

---

matrixExclusionTuples   *Create item exclusion tuples from matrix.*

Description

If item exclusions are stored as a matrix, `matrixExclusionTuples` transforms this format into item pairs ('tuples'). Information on exclusions has to be coded as 1 (items are exclusive) and 0 (items are not exclusive).

Usage

```
matrixExclusionTuples(exclMatrix)
```

Arguments

exclMatrix	A `data.frame` or `matrix` with information on item exclusiveness.

Details

Exclusion tuples can be used by <code>itemExclusionConstraint</code> to set up exclusion constraints.

Value

A <code>data.frame</code> with two columns.

Examples

```
# Example data.frame
exclDF <- data.frame(c(0, 1, 0, 0),
                     c(1, 0, 0, 1),
                     c(0, 0, 0, 0),
                     c(0, 1, 0, 0))
rownames(exclDF) <- colnames(exclDF) <- paste0("item_", 1:4)

# Create tuples
matrixExclusionTuples(exclDF)
```

---

maximinObjective   *Maximin Constraint.*

Description

Create <code>maximin</code>-constraints related to an item parameter/value. That is, the created constraints can
be used to maximize the minimal sum of the item values (<code>itemValues</code>), while at the same time setting an upper limit to the overflow by means of a maximally allowed deviation <code>allowedDeviation</code>.

Usage

```
maximinObjective(
  nForms,
  itemValues,
  allowedDeviation,
  weight = 1,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
allowedDeviation	
	the maximum allowed deviation between the sum of the target values.
weight	a weight for the real-valued variable(s). Useful when multiple constraints are combined. Should only be used if the implications are well understood.

whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting constraint-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

An object of class "constraint".

Examples

```
# constraint that minimizes the maximum difference per test form value and a
#   target value of 0
maximinObjective(nForms = 2, itemValues = rep(-2:2, 2),
                 allowedDeviation = 1)
```

---

maxObjective	*Max Constraint.*

Description

Create max-constraints related to an item parameter/value. That is, the created constraints can be used to maximize the sum of the item values (itemValues) of the test form. Note that this constraint can only be used when only one test form has to be assembled.

Usage

```
maxObjective(
  nForms,
  itemValues,
  weight = 1,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
weight	a weight for the real-valued variable(s). Useful when multiple constraints are combined. Should only be used if the implications are well understood.
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting constraint-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

An object of class "constraint".

Examples

```
# constraint that maximizes the sum of the itemValues
maxObjective(nForms = 1, itemValues = rep(-2:2, 2))
```

---

minimaxObjective   *Minimax Constraint.*

Description

Create minimax-constraints related to an item parameter/value. That is, the created constraints can be used to minimize the maximum distance between the sum of the item values (itemValues) per test form and the chosen targetValue.

Usage

```
minimaxObjective(
  nForms,
  itemValues,
  targetValue,
  weight = 1,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
targetValue	the target test form value.
weight	a weight for the real-valued variable(s). Useful when multiple constraints are combined. Should only be used if the implications are well understood.
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting constraint-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

An object of class "constraint".

Examples

```
# constraint that minimizes the maximum difference per test form value and a
#   target value of 0
minimaxObjective(nForms = 2,
                 itemValues = rep(-2:2, 2),
                 targetValue = 0)
```

---

minObjective   *Min Constraint.*

Description

Create min-constraints related to an item parameter/value. That is, the created constraints can be used to minimize the sum of the item values (itemValues) of the test form. Note that this constraint can only be used when only one test form has to be assembled.

Usage

```
minObjective(
  nForms,
  itemValues,
  weight = 1,
  whichForms = seq_len(nForms),
  info_text = NULL,
  itemIDs = names(itemValues)
)
```

Arguments

nForms	Number of forms to be created.
itemValues	Item parameter/values for which the sum per test form should be constrained.
weight	a weight for the real-valued variable(s). Useful when multiple constraints are combined. Should only be used if the implications are well understood.
whichForms	An integer vector indicating which test forms should be constrained. Defaults to all the test forms.
info_text	a character string of length 1, to be used in the "info"-attribute of the resulting constraint-object.
itemIDs	a character vector of item IDs in correct ordering, or NULL.

Value

An object of class "constraint".

Examples

```
# constraint that maximizes the sum of the itemValues
maxObjective(nForms = 1, itemValues = rep(-2:2, 2))
```

---

stemInclusionTuples   *Create item inclusion tuples from item stem.*

Description

If item-stimulus hierarchies are stored in a single stimulus column, stemInclusionTuples transforms this format into item pairs ('tuples').

Usage

```
stemInclusionTuples(items, idCol = "ID", stemCol)
```

Arguments

items	A data.frame with information on an item pool.
idCol	character or integer indicating the item ID column in items.
stemCol	A column in items containing the item stems or stimulus names, shared among items which should be in the same test form.

Details

Inclusion tuples can be used by [itemInclusionConstraint](#) to set up inclusion constraints.

Value

A data.frame with two columns.

Examples

```
# Example data.frame
inclDF <- data.frame(ID = paste0("item_", 1:6),
          stem = c(rep("stim_1", 3), "stim_3", "stim_4", "stim_3"),
          stringsAsFactors = FALSE)

# Create tuples
stemInclusionTuples(inclDF, idCol = "ID", stemCol = "stem")
```

---

useSolver   *Use a solver for a list of constraints.*

Description

Use a mathematical programming solver to solve a list for constrains.

Usage

```
useSolver(
  allConstraints,
  solver = c("GLPK", "lpSolve", "Gurobi", "Symphony"),
  timeLimit = Inf,
  formNames = NULL,
  ...
)
```

Arguments

`allConstraints`	List of constraints.
`solver`	A character string indicating the solver to use.
`timeLimit`	The maximal runtime in seconds.
`formNames`	A character vector with names to give to the forms.
`...`	Additional arguments for the solver.

Details

Wrapper around the functions of different solvers (`gurobi::gurobi()`, `lpSolve::lp()`, ... for a list of constraints set up via `eatATA`. `Rglpk` is used per default.

Additional arguments can be passed through ... and vary from solver to solver (see their respective help pages, `lp` or `Rglpk_solve_LP`); for example time limits can not be set for `lpSolve`.

Value

A list with the following elements:

`solution_found` Was a solution found?

`solution` Numeric vector containing the found solution.

`solution_status` Was the solution optimal?

Examples

```
nForms <- 2
nItems <- 4

# create constraits
target <- minimaxObjective(nForms = nForms, c(1, 0.5, 1.5, 2),
                      targetValue = 2, itemIDs = 1:nItems)
noItemOverlap <- itemUsageConstraint(nForms, operator = "=", itemIDs = 1:nItems)
testLength <- itemsPerFormConstraint(nForms = nForms,
                          operator = "<=", targetValue = 2, itemIDs = 1:nItems)

# use a solver
result <- useSolver(list(target, noItemOverlap, testLength),
  itemIDs = paste0("Item_", 1:4),
  solver = "GLPK")
```

Index