## 7567 Workplace Assignments

## Observation

#### Case study: charts and sort information

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| --- | --- | --- | --- |
| Criteria | Action | Yes | No |
| Cell ranges within the spreadsheet are charted to meet user requirements SO3 AC1 | Open the Combi chart, select cells A4:E14 and insert a column chart with the series by rows. Resize the chart so it stretches from B16:G33.  |  |  |
| File management techniques are demonstrated in terms of creating, naming, saving, copying, renaming, deleting, locating directory (folder), displaying directory contents printing and relocating SO3 AC5 | Copy the entire chart to below (B36:G53) the original one and change the chart type to a line chart  |  |  |
| The appearance of spreadsheet is modified to user requirements using formatting facilities SO4 AC1 | Change the background colour of the line chart to lavender. Save the workbook in My Documents as Combi Chart followed by your name.  |  |  |
| The spreadsheet contains cells, which are sorted numerically and alphabetically SO4 AC2 | Open the Datafile spreadsheet and sort the information alphabetically according to product name. Save as Datafile 1 with your name |  |  |
| Open the Datafile spreadsheet and sort the information numerically according to ISBN number. Save as Datafile 2 with your name |  |  |
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| Learner signature | Facilitator signature |

#### Case study

ABC computer store has the following income and expenditure amounts for the period January to March.

**Income:**

PC Sales: January R120000, February R150000, March R175000

PC Repairs: January R80000, February R85000, March R70000

PC Support: January R45000, February R50000, March R65000

**Expenses:**

Stationery: January R5000, February R4500, March R5500

Salaries: January R50000, February R50000, March R50000

Rent: January R20000, February R20000, March R20000

|  |  |  |  |
| --- | --- | --- | --- |
| Criteria | Actions | Yes | No |
| Use a computer spreadsheet file to solve a business problem SO1 AC1The problem is identified as being solvable by a spreadsheet SO1 AC1The spreadsheet is designed and documented in keeping with the nature of the problem SO2 AC2The problem is solved by the spreadsheet created. SO3 AC2Data is entered into the spreadsheet using labels and values SO2 AC1 | Enter this information into a worksheet in the appropriate format. Remember to add Total columns and rows as well. |  |  |
| The appearance of spreadsheet is modified to user requirements using formatting facilities. Alignment, cell widths, text style, font, colour, number, date and time formats SO4 AC1Data is formatted to produce the required spreadsheet in terms of cell width, alignment, number and date and time formats SO2 AC2 | Change the formatting of the cells with numbers in them to number format |  |  |
| Change the font type of the cells containing the names of the months to Book Antiqua 12 |  |  |
| Change the horizontal alignment of the cells containing the names of the months to centre aligned |  |  |
| Change the colour of the font of the cells containing Income and Expenses to Red |  |  |
| Change the format of the cell to the bottom left of your information to Date and time and enter today’s date |  |  |
| In the cell below this, enter the current time |  |  |
| The spreadsheet contains cells, which are sorted alphabetically SO4 AC2 | Sort the expenses (stationery, salaries, rent) alphabetically |  |  |
| Cell ranges within the spreadsheet are charted to meet user requirements. SO3 AC1Cell range within a spreadsheet is graphed to user requirements SO3 AC1 | Insert an appropriate chart of the above worksheet on a separate page |  |  |
| Spreadsheet formulae are applied in order to produce the required spreadsheet in terms of statistical functions SO2 AC3 | In an appropriate place on worksheet 1, where you entered the details for ABC Computer Store, calculate the following: Minimum income for PC Sales |  |  |
| Maximum income for PC Repairs |  |  |
| File management techniques are demonstrated in terms of creating, naming, and saving SO3 AC5 | Save and close the worksheet as ABC Store Assessment 1 in the My Documents Folder |  |  |
| Create a new folder in My Documents and give the folder your name |  |  |
| Copy the Assessment 1 file to this folder |  |  |
| Delete the original Assessment 1 file that was stored in My Documents under your name as Assessment 1 |  |  |
|  |  |
| Learner signature | Facilitator signature |

#### Case study: financial functions

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| --- | --- | --- | --- |
| Criteria | Action | Yes | No |
| Spreadsheet formulae are applied in order to produce the required spreadsheet in terms of financial functions SO2 AC3 | You want to buy a car for R80000 which has to be repaid in five years (60 months) at an interest rate of 12%. On sheet 2 calculate the interest payment for month 24 on this loan.  |  |  |
| Then calculate your monthly payments |  |  |
|  |  |
| Learner signature | Facilitator signature |

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| Logbook 7576 |
| **Date** | **Assignment No** | **Start** | **Finish** | **Total Hours** |
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| Date | Candidate signature | Date | Mentor/supervisor signature |

# ASSESSMENT REVIEW

|  |  |
| --- | --- |
| **NAME of LEARNER** | **NAME of ASSESSOR** |
| **VENUE**  | **DATE of REVIEW** |
| **UNIT STANDARD** | 7576 Produce and use spreadsheets for business  |
| **Review Dimension** | **ASSESSOR** | **LEARNER/****CANDIDATE** | **ACTION** |
| The principles/criteria for good assessment were achieved? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment related to the registered unit standard? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment was practical? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| It was time efficient and cost-effective and did not interfere with my normal responsibilities? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment instruments were fair, clear and understandable | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment judgements was made against set requirements | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The venue and equipment was functional? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| Special needs were identified and the assessment plan was adjusted | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| Feedback was constructive against the evidence required | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| An opportunity to appeal was given | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The evidence was recorded | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| **LEARNER”S DECLARATION OF UNDERSTANDING** |
| I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid |
|  |  |  |
| **Learner** | **Date** | **Assessor** | **Date** | **Moderator** | **Date** |

## Candidate Feedback Report

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate's Name |  | ID No. |  |
| Assessor's Name |  | Reg. No. |  |
| Unit Standard Title | 7576 Produce and use spreadsheets for business  |
| ASSESSMENT DECISION |
| Source of Evidence | C | NYC | Comments |
| Assessments  |  |  |  |
| Product |  |  |  |
| Indirect Evidence |  |  |  |
|  |  |  |  |
| Overall Assessment Decision |  |
| Additional Notes |  |
| Date  |  |
|  |  |
| Signature of Assessor | Signature of Candidate |

## Candidate Appeal Form

|  |  |  |
| --- | --- | --- |
| Candidate's Name:  |  ID No. |  |
| Assessor's Name:  | Reg. No. |  |
| Unit Standard Title:  | 7576 Produce and use spreadsheets for business  |
| Date:  |  |
| SECTION 1 |  |
| Candidate's reason for disagreeing with the assessment decision |  |
| Assessor's rationale for the assessment decision |  |
| Candidate's signature |  |
| Assessor's signature |  |
| SECTION 2 |  |
| Moderator's decision |  |
| Moderator's signature  |  |

Please send this form to:

## Assessor's Report

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate's Name |  | ID No. |  |
| Assessor's Name |  | Reg. No. |  |
| Unit Standard Title | 7576 Produce and use spreadsheets for business  |
| ASSESSMENT DECISION |
| Specific Outcome | C | NYC | Comments |
| Plan and design computer spreadsheet documents to solve a business problem |  |  |  |
| Produce a computer spreadsheet file to solve a business problem |  |  |  |
| Use a computer spreadsheet file to solve a business problem |  |  |  |
| Manipulate the data in a spreadsheet |  |  |  |
| Overall Assessment Decision |  |
| Comments |  |
| Date  |  |
|  |  |
| Signature of Assessor | Signature of Candidate |

## Moderator's Report

|  |  |  |  |
| --- | --- | --- | --- |
| Moderator's Name |  | Reg. No. |  |
| Assessor's Name |  | Reg. No. |  |
| Candidate's Name |  | ID No. |  |
| Unit Standard Title | 7576 Produce and use spreadsheets for business  |
| MODERATION DECISION |
| Specific Outcome | C | NYC | Comments |
| Plan and design computer spreadsheet documents to solve a business problem |  |  |  |
| Produce a computer spreadsheet file to solve a business problem |  |  |  |
| Use a computer spreadsheet file to solve a business problem |  |  |  |
| Manipulate the data in a spreadsheet |  |  |  |
| Overall Moderation Decision |  |
| Feedback to Assessor |  |
| Action Required  |  |
| Date of Moderation |  |
| Signature of Moderator |  |
| Signature of Assessor |  |
| Signature of Candidate |  |

## Project (Integrated Assessment)

Outcomes:

* Demonstrate ability to use the World Wide Web
* Produce word processing documents for business
* Produce and use spreadsheets for business
1. Refer to the workplace assignment where you had to do research on the Internet about smartphones.
2. Refer to this research and compile a report in MS Word where you compare these 3 types of smartphones with each other, in order to make a recommendation to your manger about which smartphone to purchase.
3. Make sure that you use a table in order to compare the cell phones
4. Add a chart that was developed in MS Excel to your report
5. Compare the costs of each cell phone in Excel and calculate the average price of all three cell phones.
6. Print your report and attach it to your assessment.

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| **LOGBOOK: Utilise technology to produce information** |
| **Date** | **Assignment No** | **Start** | **Finish** | **Total Hours** |
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| Date | Candidate signature | Date | Mentor/supervisor signature |

## Assessment Review

|  |  |
| --- | --- |
| **NAME of LEARNER** | **NAME of ASSESSOR** |
| **VENUE**  | **DATE of REVIEW** |
| **Exit level outcome** | Utilise technology to produce information |
| **Review Dimension** | **ASSESSOR** | **LEARNER/****CANDIDATE** | **ACTION** |
| The principles/criteria for good assessment were achieved? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment related to the registered unit standard? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment was practical? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| It was time efficient and cost-effective and did not interfere with my normal responsibilities? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment instruments were fair, clear and understandable | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The assessment judgements was made against set requirements | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The venue and equipment was functional? | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| Special needs were identified and the assessment plan was adjusted | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| Feedback was constructive against the evidence required | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| An opportunity to appeal was given | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| The evidence was recorded | [ ] Agree[ ] Disagree | [ ] Agree[ ] Disagree |  |
| **LEARNER”S DECLARATION OF UNDERSTANDING** |
| I am aware of the moderation process and understand that the moderator could declare the assessment decision invalid |
|  |  |  |
| **Learner** | **Date** | **Assessor** | **Date** | **Moderator** | **Date** |

## Candidate Feedback Report

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate's Name |  | ID No. |  |
| Assessor's Name |  | Reg. No. |  |
| Exit level outcome | Utilise technology to produce information |
| ASSESSMENT DECISION |
| Source of Evidence | C | NYC | Comments |
| Assessments  |  |  |  |
| Product |  |  |  |
| Indirect Evidence |  |  |  |
|  |  |  |  |
| Overall Assessment Decision |  |
| Additional Notes |  |
| Date  |  |
|  |  |
| Signature of Assessor | Signature of Candidate |

## Candidate Appeal Form

|  |  |  |
| --- | --- | --- |
| Candidate's Name:  |  ID No. |  |
| Assessor's Name:  | Reg. No. |  |
| Exit level outcome:  | Utilise technology to produce information |
| Date:  |  |
| SECTION 1 |  |
| Candidate's reason for disagreeing with the assessment decision |  |
| Assessor's rationale for the assessment decision |  |
| Candidate's signature |  |
| Assessor's signature |  |
| SECTION 2 |  |
| Moderator's decision |  |
| Moderator's signature  |  |

Please send this form to:

## Assessor's Report

|  |  |  |  |
| --- | --- | --- | --- |
| Candidate's Name |  | ID No. |  |
| Assessor's Name |  | Reg. No. |  |
| Exit level outcome | Utilise technology to produce information |
| ASSESSMENT DECISION |
| Specific Outcome | C | NYC | Comments |
| Demonstrate ability to use the World Wide Web |  |  |  |
| Produce word processing documents for business  |  |  |  |
| Produce and use spreadsheets for business  |  |  |  |
| Overall Assessment Decision |  |
| Comments |  |
| Date  |  |
|  |  |
| Signature of Assessor | Signature of Candidate |

## Moderator's Report

|  |  |  |  |
| --- | --- | --- | --- |
| Moderator's Name |  | Reg. No. |  |
| Assessor's Name |  | Reg. No. |  |
| Candidate's Name |  | ID No. |  |
| Exit level outcome | Utilise technology to produce information |
| MODERATION DECISION |
| Specific Outcome | C | NYC | Comments |
| Demonstrate ability to use the World Wide Web |  |  |  |
| Produce word processing documents for business  |  |  |  |
| Produce and use spreadsheets for business  |  |  |  |
| Overall Moderation Decision |  |
| Feedback to Assessor |  |
| Action Required  |  |
| Date of Moderation |  |
| Signature of Moderator |  |
| Signature of Assessor |  |
| Signature of Candidate |  |

# COMPETENCE DECLARATION

|  |
| --- |
| **Exit level outcomes: Utilise technology to produce information** |
| **Unit standard** | **C** | **NYC** | **Comments** |
| 7573 |  |  |  |
| 7570 |  |  |  |
| 7576 |  |  |  |
| Integrated assessment |  |  |  |
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| **Competent** |
| **Source of evidence** | **Yes** | **No** | **Candidate’s comments** |
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|  |  |  |  |
| **Assessor signature** | **Date** | **Candidate signature** | **Date** |
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| --- | --- |
| **Overall Moderation Decision** |  |
| **Feedback to Assessor** |  |
| **Action Required**  |  |
| **Date of Moderation** |  |
| **Signature of Moderator** |  |
| **Signature of Assessor** |  |
| **Signature of Candidate** |  |

# PORTFOLIO BUILDING

Your Portfolio of Evidence (PoE) contains the evidence needed to declare you competent and to award credits towards the award of this qualification to you. Evidence should be authentic and reflect both your knowledge of the subject and your ability to apply this knowledge in the workplace. Thus, evidence day to day activities supporting the specific outcomes addressed by this learning programme should complement the theoretical learning you attended and were assessed on.

There are FIVE key steps in creating a portfolio that will reflect your competence.

#### Plan Your Portfolio

Plan and document the sequence, graphics and layout of your portfolio. This will assist you in following a logical sequence, which makes the Portfolio also much more user friendly and understandable for the assessor. It will also reflect your professional approach and attitude towards the subject matter, your work and your life. Impact and appearance always contribute to or affect your chances of being taken seriously and declared competent!

#### Gather The Evidence

An evidence checklist has been provided (Section 4) to tell you what evidence needs to be gathered for assessment purposes. However, there are four broad categories of evidence that you should include:

* Knowledge evidence (your knowledge questionnaire)
* Direct performance evidence (actual samples of your work or records of activities captured on audio or video tape)
* Indirect performance evidence (documentary records of your performance e.g. appraisals, photographs, testimonials, self-assessments, customer ratings etc.)
* Supplementary evidence (to confirm the authenticity of your evidence)

####  Evaluate Your Evidence

Once you have collected your evidence, evaluate each piece by ensuring that it is:

* Valid (relevant to the unit standard/s being assessed)
* Authentic (clearly your own work)
* Current (not more than 2 years old)
* Sufficient (adequate to prove your competence against all of the assessment criteria and range statements in the unit standard/s)

#### Cross-Reference Your Evidence To The Unit Standards

Evidence for assessment against unit standards must be linked to the outcomes of the unit standard in question. An evidence locator grid is useful for this.

#### Organise Your Information

How you structure your portfolio is critical. Your design and layout must look professional and clearly articulate your achievements, and it should make sense to someone seeing it for the first time. Use the following structure as a guide:

1. A title page indicating:
	* The title of the programme
	* The unit standard titles to which the programme is aligned
	* The assessment centre (Training provider)
	* Your name, position and organisation
	* Your contact details
	* The name of your assessor
	* The name of your moderator
	* The date
2. An index
3. Background information
	* Curriculum Vitae
	* Organisation profile
	* Job profile
	* Organisation/department structure
4. A copy of the unit standard/s
5. Your assessment plan
6. Your completed Knowledge Questionnaire
7. An evidence locator grid
8. The evidence itself
9. Supporting evidence e.g. witness testimonies, reflections and witness status list
10. Assessment records

## Moderation

#### Moderation Of Assessments Must Be Planned In Order To:

* Identify the outcomes as per unit standards
* Identify the evidence to be collected
* Identify steps of a logical process
* Design an appropriate assessment (criteria and tool)
* Review success or adjustments to be made to the assessments
* Provide appropriate feedback and set targets and action plans

#### Pre-Assessment Moderation

This occurs prior to assessment taking place and includes moderation of:

* Assessor suitability/qualifications
* Assessment guidelines which are explained to all assessors in bi-weekly meetings
* Standardised assessment tools which are reviewed in assessor meetings
* Guidelines for organising evidence (see Portfolio of Evidence guidelines)
* Assessor/candidate appeals process
* The assessor must consult with the moderator to ensure that the assessment instrument is valid, reliable and practicable. The moderation model will be the assessor moderator comparison, so as to ensure that the assessment instrument is fit for purpose and that the assessment plan is adequate in order to achieve the outcomes of the assessment process.

#### Post Assessment Moderation

Post-assessment moderation must take place at the end of the assessment process, once feedback has been given to the candidate.

Post-assessment moderation must check specifically that the evidence on which the decision of competence is based is valid, authentic, current and sufficient. Until post-assessment moderation has taken place, the assessment process is incomplete, as there is a chance that the moderator may disagree with the assessor regarding the decision reached in terms of competence.

Even so, the candidate needs to be cautioned that external moderation/verification needs to take place prior to candidate achievement being confirmed and recorded on the National Candidate Record Database.

The focus in post-assessment moderation is also to address continuous improvement of assessment activities and tools. The moderator needs to critically evaluate the review process and ensure that candidate consultation in the review process was both meaningful and constructive i.e. avoid simplistic yes/no questions which give little qualitative data.

25% of all assessment sampling across the board is moderated. The samples are representative of assessments conducted by each assessor and for each project