Assessment support pack

BSBITU314 Design and produce spreadsheets

Release 1

Aspire Version 1.1

About this resource

This resource is for trainers and assessors of the unit *BSBITU314 Design and produce spreadsheets*, Release 1. It complements the corresponding Aspire *Learner guide*.

The *Assessment support pack* provides you with ideas and guidance on encouraging and supporting students through the training and assessment process using Aspire resources. It is designed to help you optimise the student's experience and record details of their competency.

This resource is comprised of several folders with the following editable documents to assist trainers and assessors.

Folders	Documents
Introduction	Introduction
Formative assessment	Formative assessment guide
Summative assessment	Final assessment marking guide Student assessment Third-party report
Supporting documents*	Sample documents and templates
Mapping	Contains formative and summative mapping
PowerPoint	PowerPoint slides for training purposes

*The supporting documents folder is inside the summative assessment folder.

Key features

- The *Assessment support pack* complements the Aspire *Learner guide*.
- It includes weblinks to the relevant unit of competency and other support resources.
- Provides guidelines for trainers and assessors on their responsibilities for formative and summative assessment to meet VET requirements.

Formative assessment

- Includes activity questions with a marking guide.
- Discussion topics provide trainers with a guide to engage with students about the learning content.
- Clearly maps the learning content to the unit of competency requirements in a customisable Excel spreadsheet.

Final assessment

- Includes detailed instructions to assessors on each assessment task.
- Includes a marking guide for each final assessment task.
- Clearly maps the final assessments to the unit of competency requirements.
- Mapping is provided in an Excel spreadsheet that allows you to customise and adjust as necessary.

Formative assessment overview

This resource complements the corresponding Aspire *Learner guide*. Formative assessment helps students to consolidate their learning and trainers to determine how students are progressing.

How to use formative assessment

Formative assessment tasks can be used by students in a variety of settings. Trainers can adapt these resources in a variety of ways, such as for small groups, verbal questioning, online forums or individual tasks. Trainers may choose to add to, change or substitute the questions provided by Aspire. This should be done according to the experience of students and the specific learning situation.

Practice tasks and learning checkpoints

Aspire learner guides include practice tasks and learning checkpoints with questions about the learning content. These formative learning tasks are mapped to the unit of competency and include a range of question styles to suit most students. They allow the student to review their understanding of the content.

The question styles and content are designed to complement the final assessment questions. This provides students with an opportunity to practise before completing the final assessment. Students can access online versions of the practice tasks via links in the eBook, which provide immediate solutions and suggested responses.

The *Formative assessment guide* provides questions, along with solutions or suggested responses. It also provides discussion topics with suggested responses.

Solutions should serve as a reliable guide to the information a trainer would expect to see in a student's response. The nature and variety of the questions means that, in some cases, there will be numerous correct responses, and the solutions provided cannot cater for all contexts and all possible outcomes.

The answers provided by the student will vary due to a number of factors, including:

- the student's personal and work-related experiences
- the situations and strategies presented by the trainer
- the student's or trainer's interpretation of the activity
- the type of organisation, work practices, processes and systems encountered by the student.

Assessment task 1: Questions

By correctly completing the questions you will demonstrate that you have the required knowledge to design and produce spreadsheets.

This is an open-book task – you can use a learner guide, the internet, and other books and resources to assist you if required.

Respond to all questions in the spaces provided. You must answer all questions correctly for this task to be completed satisfactorily.

Evidence

You must submit the completed assessment cover sheet and your answers to your assessor, either by handing in written responses, or by sending in typed responses via email or online submission. For online submission, you will need information on file sizes for uploads and log-in details. Your assessor will tell you how to submit your responses to this task. Ensure you keep a copy of your submitted work.

When and where will this assessment take place?

Your assessor will advise you where the assessment will take place. The task may be done in the classroom or at home. Alternatively, it may be undertaken in your workplace in consultation with your employer.

Your assessor will also tell you when your work should be submitted by. You can record this in the assessment plan. Your assessor may give you a time limit to complete the task and a word count for each question.

What if the assessment is not suitable?

If you are unable to respond to the questions in writing, your assessor may be able to provide you with an alternative method, such as providing large print documents. Discuss this with your assessor.

What if answers are not satisfactory?

If any of your responses are unsatisfactory, your assessor will give you feedback. You may need to redo some or all of the questions – your assessor will explain the details for your reassessment. In most cases you will be allowed a maximum of three attempts.

If you are not happy with your assessment result, you have the right to lodge an appeal. Ask your assessor or contact your RTO for more information.

Result	**S ☐**	**U ☐**

Question 4

Which of the following are guidelines that provide information on the task requirements such as design and use of a spreadsheet? Tick all that apply.

- ☐ Refer to the organisational style guide.
- ☐ Ask the customer what they would like the spreadsheet to look like.
- ☐ Use an existing template.
- ☐ Clarify information with your supervisor and colleagues.
- ☐ Look for an example of a spreadsheet and work from that.
- ☐ Review the production guidelines to ensure that time lines will be met.

Result	**S ☐**	**U ☐**

Question 5

You are asked to develop a spreadsheet for the customer service team. They need a spreadsheet for recording complaints and feedback from customers.

Match each component of the task on the left with the type of information you need to complete it on the right.

Storage requirements	• Customer names and contact details • Information source • Sale results
Presentation format	• Save to desktop • Confirm file location • Upload final version to shared drive.
Time line	• Input data from source • Enter formula to calculate end result
Data entry	• Allow two days to develop a version ready for review • Allow two days for amendments and submission via email by Thursday

Project instructions

You must record the requirements of a task and then produce **two** different spreadsheet documents within a set time line.

Spreadsheet documents could include:

- Profit and loss report
- Schedule for completing tasks
- Database

Section 1: Preparing and planning spreadsheets

1. You will be observed following your organisation's ergonomic, conservation and WHS policies and procedures to set up your workstation and operate the computer. For example, you may need to adjust your chair and monitor, and turn off your screen when not in use.

2. Record the requirements of the task and produce spreadsheets:

   a. Identify the purpose and target audience, such as a summary report of GST for the ATO or a database record for customer service.

   b. Identify the task requirements in relation to data entry, storage, output time line and presentation.

   c. Select the most appropriate application for the task in line with requirements, available resources and organisational policies.

Evidence to submit:
❑   Record of task requirements

Section 2: Creating spreadsheets and charts

3. Create **two** spreadsheets that address the style and presentation requirements using software functions, graphics and support materials:

   a. Select design features that enhance readability and appearance, such as adding borders, and changing font type, colour and size.

   b. Check and amend the data to ensure consistency in design and layout.

   c. Format by adjusting the layout of the page and cells, such as referring to a style guide, or using a style sheet or template.

4. Create and modify charts:

Section 3: Finalising and submitting spreadsheets

The student's project shows evidence of the following:	S	U
6. *Consulting with an appropriate person to ensure formulas are correct and that the spreadsheets meet task requirements Comments:	☐	☐
7. Reviewing and editing final spreadsheets and charts ready for delivery Comments:	☐	☐
8. Naming and storing the final versions of spreadsheets according to organisational requirements Comments:	☐	☐
9. Submitting the documents within set time lines and in accordance with organisational requirements for speed and accuracy Comments:	☐	☐
Additional questions:† Student responses:		
Feedback:		

S=Satisfactory U=Unsatisfactory

*Item must be observed

†Record additional questions to address contingencies and further clarify student understanding.

This may include:

- Editing for correct layout, ensuring consistent styles have been used, that the information is clear and easy to read and the data is clear
- Editing for spelling and grammar
- Formatting data to suit organisational requirements
- Reviewing a hard-copy or on-screen version via print preview

8. Naming and storing the final versions of spreadsheets according to organisational requirements

This may include:

- Following file-naming conventions
- Using the correct folder structure
- Backing up files on a USB or external hard drive
- Saving work frequently
- Using a shared directory so others can access the documents
- Managing version control
- Locking the document or computer with a password

9. Submitting the documents within set time lines and in accordance with organisational requirements for speed and accuracy

This may include:

- Submitting an electronic or hard copy to meet a deadline
- Using a schedule or checklist to monitor tasks
- Managing time to produce documents to a deadline
- Using AutoFill and AutoText to speed up spreadsheet production

*Item must be observed.

Third-party checklist

During the period of observation, I observed the student consistently and repeatedly demonstrating these skills to the required work standard.	Observation date/s:	
	O	N
1. Following the organisation's ergonomic, conservation and WHS policies and procedures to set up the workstation and operate the computer Outline of the task: • Making adjustments to the workstation to suit individual requirements • Ensuring correct posture when sitting or standing at the workstation • Taking regular breaks to stretch and stand up • Using both sides of the paper when printing and photocopying • Other (please describe): Comments:	☐	☐
2. Producing spreadsheet documents that align to document purpose and are appropriate to the target audience Outline of the task: • Selecting the appropriate spreadsheet application and design for the spreadsheet • Collecting and collating the data to populate the spreadsheet • Using consistent formatting for headings, columns and rows • Using pre-existing templates that adhere to the style guide • Other (please describe): Comments:	☐	☐
3. Designing spreadsheets that address a range of data and organisational requirements		
a. Ensuring spreadsheet design enhances readability and appearance, and meets organisational and task requirements for style and layout Outline of the task: • Highlighting key information by using appropriate titles for columns and rows • Formatting cells by shading, adding borders, and changing font type, colour and size • Making the text more legible by increasing the size, using bold or colour • Using a style sheet that reflects the image of the organisation • Other (please describe): Comments:	☐	☐
4. Producing spreadsheet documents in an appropriate format for review, including creating and modifying intermediate-level charts that analyse the dataset	☐	☐