

Support Materials

Level 2 CLAiT Plus for use with ITQ

Levels 1-3 in IT User Skills

Assessment Marking Handbook

Version 4 issued August 2022

Text has been added in blue for the 2021 and 2022 updates.

(See final page for a list of the key changes)

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1 Introduction

The CLAiT 2006 qualifications, entry codes 05538, 05539, 05540, closed for entry on 31 August 2010 and for certification on 31 August 2011.

Centres can continue to use Level 2 CLAiT Plus paper-based assignments to produce evidence for **ITQ Levels 1-3 in IT User Skills** (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995).

OCR's Level 2 CLAiT Plus units have been fully mapped against the ITQ units. The paper-based assignments can be used by centres as an assessment method for candidates to achieve specific units in the ITQ qualifications. OCR-set CLAiT assignments for use with ITQ are free to download from the OCR Interchange site. Whilst the assignment tasks remain the same, the front cover and this marking guide have been updated to support the use of evidence for ITQ.

2 Assessment and Moderation

2.1 OCR-Set Level 2 CLAiT Plus Live Assignments for use with ITQ

Level 2 CLAiT Plus Live material is referenced by the unit number, academic year of introduction and set code. For example, the assignment for Level 2 CLAiT Plus Unit 1 published in 2006/07 is referenced 1/06, and the assignment for Unit 3 published in 2006/07 will be referenced 3/06.

Centres are not permitted to amend live assignments.

OCR Level 2 CLAiT Plus sample assignments (referenced 1/SAMPLE/A, 4/SAMPLE/B, etc) stored on the OCR website cannot be accepted by OCR as candidates' final assessment for the ITQ qualifications.

All live assignments and associated data files for use with the assignments are available to download from [OCR Interchange](#), by clicking 'CLAiT &ITQ' under 'By qualification'.

PLEASE BE AWARE Candidates should complete Level 2 CLAiT Plus 2006-2010 assignments now as live assessments.

The 2005-2006 Set A and B are withdrawn and must not be used as live assessments for ITQ.

2.2 Currency of Assessment Materials

The following Level 2 CLAiT Plus assignments will remain as live materials for the accreditation period of the ITQ Levels 1-3 in IT User Skills qualifications (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995):

- 2006-2007
- 2007-2008
- 2008-2009
- 2009-2010

A secure place must be available for the storing of live assessment material in advance of the assessments. After the assessments have taken place, a secure place must be available to store candidate work before it is submitted to the OCR ITQ Examiner-moderator.

2.3 Assessment Information

Before arranging an assessment, tutors should read this Assessment Marking Handbook carefully and any relevant Notes for Tutors in the live assignment booklet.

The OCR-set assignments for all units have a notional duration of 3 hours each.

The 3 hour assessment can be split over shorter, consecutive sessions if required. Centres must ensure all assessment material and work in progress is kept secure in the intervening period. Candidate work must be locked in a secure place. **No teaching sessions or tutorials can be held between assessment sessions.**

Centres must be able to provide accommodation for the assessment. The assignments must be completed under supervised conditions in a quiet, business-like atmosphere. It is acceptable to carry out the assessment during normal timetabled sessions or (for work-based assessment) during the working day.

Candidates may use English and mother-tongue dictionaries, spellcheckers (UK English), centre-prepared manuals, candidates' own notes or manufacturers' manuals during the assessment. Such manuals/notes are permitted only to cover the generic operation of the software and hardware to be used and must not refer to the assessment objectives or assignment, or assist the candidate unfairly with the interpretation or completion of instructions.

Candidates will need individual access to a computer for the duration of the assignment, and access to a shared printer as a minimum requirement.

Centres should ensure that the assignments are worked in advance of assessment, by the tutor or centre assessor, using the chosen software and hardware to be used by candidates.

Centres are responsible for ensuring that the hardware and software to be used for the assessment is in full working order and is sufficient to enable the candidate to meet all assessment objectives as specified in the assignment and in the unit content and assessment guidance. OCR does not recommend specific software for any units. OCR will not make allowances for software which does not permit candidates to complete the objectives as specified. Errors as a result of faulty or inappropriate hardware or software will not be taken into consideration by OCR. Centres must ensure that hardware and software is set to UK English spelling and UK date format i.e. day, month, year.

In the event of a system failure, power cut or damage to equipment (including loss of Internet or network connection and/or system crash), candidates may be allowed a fresh attempt at the same assignment. This allowance does not cover any impediment caused by incorrectly set-up or configured software/hardware or any failure on the candidates' part to cope with standard system behaviour for which they have not been prepared.

Candidates cannot ask for, nor be given, any assistance during the assessment, except in the case of a system failure as detailed above. Once the candidate starts the assignment, **no further tuition may be given**.

At the end of the assessment, candidates should present the invigilator with the printouts they wish to submit. Where the candidate has produced additional, unrequested printouts, they should be destroyed. Centres should be aware that OCR will not make allowances for errors introduced by additional printouts and candidates may be disadvantaged if it is not clear which printouts are to be moderated.

All units are assessed and marked by the centre and externally moderated by the OCR-appointed ITQ Examiner-moderator.

2.4 Repeat Attempts/Re-sits

Candidates are only permitted one attempt at each live assignment. In the event that a candidate is unsuccessful in an assignment for a particular unit, they may re-sit that unit using a **different assignment** e.g. unsuccessful attempt at 2006-2007 Unit 1, candidates can attempt 2007-2008 Unit 1.

Under no circumstances should any of the centre assessed units be submitted to OCR unless the centre assessor is satisfied that all the necessary criteria for an award of the unit have been met by the candidate.

Centres should submit only the assignment representing the candidate's best performance.

When candidates will be re-sitting the assessment:

- they may be shown (but must not retain) their marked first attempts, and may have their errors pointed out to them
- feedback and further tuition may be given on the objectives that have not been achieved
- once the candidate has started their re-sit assignment, **no further tuition can be given.**

2.5 Security Issues

A suitably competent invigilator must be present throughout to supervise the assessment. This would normally be the tutor or centre assessor. If the invigilator is not the centre assessor, they must be given guidelines as to which aspects of the candidates' work need to be observed.

Candidates must not communicate with each other in any way during the assessment.

Candidates cannot ask for, nor be given, any assistance during the assessment, except in the case of a system failure. In the event that the software behaves differently from expectations (e.g. due to default settings having changed) then candidates should complete the assignment and be given a re-sit if necessary. It is not permitted for the invigilator/tutor to assist in these circumstances.

All live assignments are confidential. They should be issued only at the time of assessment and must be collected at the end of the assessment. Files for live assignments are confidential. Candidates must not have access to files for live assessments until the time of assessment. At the time of assessment, candidates must only have access to the file(s) for the relevant unit. Local assessors presenting themselves as candidates should also not have access to the assignments or files before they take the assessment.

All work stored on the network, CD etc must be kept secure. Centres are advised to consider setting up password controlled access to network areas for assessment purposes.

All draft work and printouts produced during the assessment must be collected and destroyed.

Centres must ensure that candidates do not have the opportunity to retrieve the printouts of another candidate. Most of the assignments require the candidate to print their name, centre number and date on their work to assist in correctly identifying printouts.

Completed assignments must be kept securely by the centre prior to submission to the OCR ITQ Examiner-moderator. In no circumstances should the completed work be left in the custody of the candidates.

2.6 Evidence Requirements

All assignments are referenced to the assessment objectives in each unit. These references appear on the side of the page adjacent to the instruction where the candidate has the opportunity to demonstrate the objective. Marking of Level 2 CLAiT Plus assignments involves checking that the assessment objectives have been met correctly, according to the specifications of the assignment, and of the marking guidance for each unit given later in this handbook.

Each assignment contains sufficient print instructions to provide all of the necessary evidence.

Failing to produce a required printout will result in errors against each of the objectives for which that printout provides evidence.

Candidates are required to complete the assignments with no **critical errors** and no more than **six** accuracy errors. Critical errors and accuracy errors are specified in the marking criteria for each unit.

Centres should only submit the one attempt that is to be certificated, claiming the relevant ITQ unit number – see Section 3. Centres should submit the candidates' prints presented in the correct sequence accompanied by the ITQ Candidate Submission Cover Sheet for each candidate. Prints should not be enclosed in plastic wallets.

2.7 Centre Assessment

The centre assessor is responsible for marking Level 2 CLAiT Plus candidates' work in the centre, and is normally the course tutor. Large centres are likely to have more than one centre assessor, in which case they should take steps to ensure that the standard of assessment is consistent (see below).

Centres are responsible for identifying staff that are able to act as centre assessors. OCR makes no specification regarding the background and experience of centre assessors other than that they must mark the candidates' work in accordance with the Level 2 CLAiT Plus unit marking criteria, the assignments and the assessment guidance. Marking of a poor standard may result in certification claims being withdrawn

In advance of the assessment, the centre assessor(s) must work through the Level 2 CLAiT Plus live assignments to be used and generate a correct worked copy for marking purposes. This serves a number of purposes:

- to ensure the hardware/software to be used will enable candidates to achieve all of the assessment objectives
- to ensure that all the terminology used in the assignments has been covered in tuition
- to produce a correct worked copy from which the centre assessor will mark candidates' work
- to provide the OCR ITQ Examiner-moderator with an example of the expected system output.

OCR does not supply correct worked copies due to the discrepancies in output that can occur on different systems. OCR does not offer the service of checking or approving worked copies.

The assessor's worked copy must be submitted to the OCR ITQ Examiner-moderator with the candidates' work. A separate worked copy must be provided for each centre assessor who has marked work in the batch, unless an Internal Standardisation Form is included – see Section 6.2 Failure to submit worked copies places candidates at a disadvantage in the moderation process, as such copies can often assist the moderator in explaining unusual assessment output. The worked copies only need to be submitted once. A worked copy needs to be provided, to your allocated ITQ Examiner-moderator, each time a different unit assignment is submitted, preferably in electronic format.

The centre assessor must indicate all errors on the printouts. All candidate printouts, including those where there are no errors, must show evidence of the centre assessor's marking. If there are no errors on a printout, then a tick and/or a comment such as "no errors" will suffice.

Please see Section 2.9 about marking evidence for electronic submissions.

As Unit 7: Website creation is submitted electronically centre assessors must complete a Candidate Assessment Summary Sheet for each candidate. This must be included with the Candidate Submission Cover Sheet. The Administration instructions for this unit are printed at the beginning of each Level 2 CLAiT Plus Unit 7 assignment.

Failure to identify errors or to provide evidence of marking may result in certification claims being withdrawn.

Centre assessors are advised not to discuss estimated results with candidates until results are confirmed by OCR.

2.8 Internal Standardisation

Internal standardisation in centres is an essential part of this process and OCR expects centres who have more than one centre assessor to put in place systems which ensure that they are marking to the same standard. The design of such systems is up to the centre, but may include double marking; appointing an internal co-ordinator; regular meetings or cascaded training; and recording and sharing assessment decisions and rulings received from OCR.

In addition, OCR provides an Internal Standardisation Form which, if completed correctly, permits the centre to submit a single worked copy for each assignment instead of one set per centre assessor – see Section 6.2. To enable this timesaving option, centres must confirm on the form that all candidates in the batch have been assessed using similar software/hardware set-ups, and that all centre assessors have used the single worked copy for marking purposes.

2.9 External Moderation

The OCR ITQ Examiner-moderator will moderate the centre assessor's marking for Level 2 CLAiT Plus units submitted as evidence for ITQ.

OCR Examiner-moderators are not empowered to enter into direct contact with centres. Under no circumstances should centres attempt to contact them in any way other than through posting or emailing candidate work to the address provided to them by OCR.

Candidate evidence can be submitted electronically via your allocated ITQ Examiner-moderator OCR mailbox. Please see Section 6 of the ITQ Centre Handbook for guidance (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995).

Please refer to the ITQ Centre Handbook for entering and submitting for ITQ certification and full details of external moderation.

3 Certification

OCR's Level 2 CLAiT Plus assignments can be used to produce evidence and claim for the specific ITQ units detailed below:

| Level 2 CLAiT Plus unit number and title | Claim ITQ Level 2 unit number and title | ITQ unit accreditation number |
|---|--|--------------------------------------|
| 1 Integrated e-Document Production | 78 Word processing software | R/502/4628 |
| 2 Manipulating Spreadsheets and Graphs | 70 Spreadsheet software | F/502/4625 |
| 3 Creating and Using a Database | 19 Database software | M/502/4555 |
| 4 e-Publication Design | 31 Desktop publishing software | D/502/4566 |
| 5 Design an e-Presentation | 59 Presentation software | M/502/4622 |
| 6 e-Image Manipulation | 37 Imaging software | L/502/4613 |
| 7 Website Creation | 81 Website software | R/502/4631 |
| 8 Electronic Communication | 34 Using email | M/502/4300 |

Candidate achievements will be recognised through the issue of an ITQ unit certificate listing the ITQ units achieved.

Please refer to the ITQ Centre Handbook for full details of entering and submitting for ITQ certification (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995).

4 Unit Content and Assessment Guidance

4.1 General Marking Criteria

Refer also to the Section 'Evidence Requirements'.

This general marking criteria below applies to all units except if stated otherwise in the unit marking criteria.

- Candidates must complete each assignment with no **critical errors** as defined under the heading 'Critical errors' and with no more than **six** accuracy errors.
- Centres must ensure that their systems will allow English UK spelling and UK English date format (date followed by month followed by year). Incorrect spelling and/or date will be penalised.
- All evidence must be clearly displayed on the printout where applicable (e.g. gridlines, borders, shading, hyperlink, attachments). Lack of evidence will be penalised under the relevant assessment objective. Tutor witness statements or annotations on the print will not be accepted.
- Errors in entering the candidate's name and centre number within the assignments are not penalised.
- Unless automatic fields in headers and footers are an assessment objective, header and footer information is treated as one data item. Omission of any or all header and/or footer items is penalised as one accuracy error per assignment. Where automatic fields in headers and footers are an assessment objective candidates may incur a maximum of two accuracy errors for omission of headers and footers (one for the missing automatic field and one for any/all other data missing).
- Unless otherwise specified in the unit content and/or the assignment additional formatting and/or information, that does not affect usability of the document, is not penalised. For example the addition of row and column heading and gridlines in spreadsheets, or additional labels in a database report.
- All font sizes and styles used must be clearly readable. Unreadable text will be penalised under the relevant assessment objective.
- Candidates are only penalised once for any given error, regardless of how many times that specific error appears on subsequent printouts (e.g. if in presentation software an image is incorrectly placed then it is an accuracy error on the first print but then it is a repeated error on any further printouts and is one accuracy error in total for the assignment).
- Errors corrected on subsequent prints will not be accepted.
- Candidates are only penalised once for repeated instances of the same data entry error (e.g. the same word being misspelled on multiple occasions).
- Inconsistent or incorrect spacing before or after symbols (e.g. /, -, ") is penalised as one accuracy error per assignment.

- Specified amendments must be maintained through to the final print, each amendment not maintained will be penalised under the relevant assessment objective.
- For information on how to penalise upper and lower case, refer to the marking criteria for the individual unit.
- An error in completing a centre-assessed objective should be noted on the print by the assessor (e.g. circle/underline mis-spelt word and note “1 accuracy error”, good practice would be to include criteria reference e.g. for desk top publishing unit 4 an error with set margins the assessor should also write “1c”).
- A printout spreading onto additional sheet(s) is not penalised except where specified (provided the additional sheet is submitted).
- In units 1 to 6 any missing printout (with the exception of screen prints) is penalised as a critical error. However, if part of a print is missing, any missing evidence will be penalised under the relevant assessment objective. For unit 7 a missing HTML page is penalised as a critical error. For unit 8 refer to the individual marking guidance for this unit.
- Filenames are not case sensitive and can be inputted in any case regardless of how they are displayed in the assignment. The candidate is not penalised if the case is different or inconsistent to the assignment.
- The candidate is not penalised if file paths are displayed in addition to the filename as part of the header or footer.
- The candidate is not penalised if file extensions are displayed as part of the filename in headers or footers.
- Candidates may display their name in any format. This applies to names added as part of the filename or names inputted directly into the header or footer.
- When a request for a candidate to add their name or initials to an existing filename, use of or omission of, brackets and/or spaces in these folder names or filenames are not penalised.
- Where page numbers are requested in the assignment, the word ‘page’ may or may not be shown.
- Where page numbers are requested in the assignment, the numbers MUST appear on all pages unless there is a specified instruction to not show on the first page.
- Prints must be original; photocopies of candidates’ work are not acceptable.

4.2 Critical Errors

A **critical error** is one which renders the goal document unfit for its purpose, for example, a missing image in a document, a failed link from one spreadsheet to another, or a failure to show any files attached to an e-mail.

In order to pass, candidates must not make any **critical errors**. **Critical errors** are explicitly defined for each unit, as per the table below, and in the marking criteria for each unit.

| Unit Title | Critical errors |
|--------------------------------------|--|
| Integrated e-Document Production | <ul style="list-style-type: none"> • results of mail merge missing in their entirety • a specified datafile is missing • a specified image is missing • a specified graph is missing • a missing document printout (excluding screen prints)* |
| Manipulating Spreadsheets and Graphs | <ul style="list-style-type: none"> • incorrect numeric data (as a result of data entry, formulae or sort results) • missing formula • formula that will not consistently produce the correct results • failure to insert specified row/column • failure to delete data in specified row/column • failure to use a reference to a cell in another spreadsheet • incorrect filter results • failure to maintain integrity of data once sorted • failure to create specified chart • missing data or incorrect values on graph/chart due to incorrect data selection • labels and/or legend do not identify data clearly • using text instead of a figure e.g. "0" or 'zero' instead of 0 • a missing printout |
| Creating and Using a Database | <ul style="list-style-type: none"> • error(s) in numeric field(s) (including dates and summaries) • missing field(s) • incorrect search results (on available data) • integrity of data not maintained • missing group headers • a missing printout |
| e-Publication Design | <ul style="list-style-type: none"> • any missing image • specified text file is missing or incomplete • illegible fonts • an incorrect imported image • a missing printout (excluding screen prints)* |

| | |
|--------------------------|---|
| Design an e-Presentation | <ul style="list-style-type: none"> • any specified image is missing • a missing slide • failure to hide specified slide • failure to delete specified slide • failure to apply timings on specified slides • a missing printout (excluding screen prints)* |
| e-Image Manipulation | <ul style="list-style-type: none"> • any specified image is missing • any block text missing in its entirety • a missing frame in an animation • a missing frame duration • failure to save animation in an appropriate format • failure to print full colour proofs • a missing printout (excluding screen prints)* |
| Website Creation | <ul style="list-style-type: none"> • any specified image is missing • any specified text file is missing • a missing or inoperative link • an inoperative form (incorrect or missing: method/action/hidden field/reset button/submit button) • a missing html file • failure to save the website |
| Electronic Communication | <ul style="list-style-type: none"> • any missing, incomplete or incorrect attachment • an incorrect or missing email address (in contact details or an email message) • a missing calendar entry • incorrect day and/or time for a calendar entry • a missing printout of any of the following: <ul style="list-style-type: none"> ◇ contact and group details ◇ an email message ◇ calendar ◇ notes ◇ to-do tasks |

Any error not appearing on this list is considered an accuracy error.

* Screen printouts are required to evidence certain objectives. See the relevant unit for details.

4.3 Accuracy Errors

An accuracy error is one which does not prevent the goal document or activity from being usable. Candidates are permitted to make no more than **six** accuracy errors in any given assignment. Accuracy errors may occur in two different ways:

- errors in completing any other assessment objective as instructed that are not listed as a critical error
- errors in keying data (data entry errors).

No distinction is made between these two types of error, and both types count equally towards the overall total of six permitted accuracy errors per assignment.

4.4 Errors in Completing Assessment Objectives

An error occurs where a candidate has not achieved an assessment objective as specified and this error is not listed as a critical error.

Specific details of the criteria for each objective may be found in the marking guidance for each individual unit.

Note that candidates should not be penalised for failing to achieve an objective if this is attributable to an earlier data entry error (e.g. a data entry error causes a database to be sorted incorrectly).

4.5 Errors in Keying Data (Data Entry Errors)

A data entry error is an incorrect/omitted/additional character in a **data item*** or an omitted/additional space. Only one data entry error should be counted for a **data item***, regardless of the number of errors in the data item.

Identical data entry errors should be penalised on the first occasion only.

***The 'data item' varies in scope for each unit, depending partly upon the relative importance of data accuracy in that unit. The table below defines the data item for each Unit:**

| Unit Title | Data Item |
|--------------------------------------|--|
| Integrated e-Document Production | <ul style="list-style-type: none"> • a word in input data • a code in mail merge • headers and footers |
| Manipulating Spreadsheets and Graphs | <ul style="list-style-type: none"> • text in a table cell in spreadsheets • a filename • header and footer • a heading in a graph • an axis title in a graph • a legend in a graph |
| Creating and Using a Database | <ul style="list-style-type: none"> • the contents of a field within a record (each cell) • a field heading • a report title • a summary label • a footer • a filename • a query name • a report name • a table name |
| e-Publication Design | <ul style="list-style-type: none"> • a word • headers/footers • a filename |
| Design an e-Presentation | <ul style="list-style-type: none"> • a title • a subtitle • a bullet point/a line of text • an organisation chart • a chart (graph) • a table • header and footer |
| e-Image Manipulation | <ul style="list-style-type: none"> • a block of text • an image |

| Unit Title | Data Item |
|--------------------------|--|
| Website Creation | <ul style="list-style-type: none"> • a title and META tags • a line/item of keyed in text • a drop down list • a form field • a word in imported text • a filename |
| Electronic Communication | <ul style="list-style-type: none"> • a contact entry • an email subject heading • content of email message • content of calendar entry • content of to-do task • content of note |

A 'word' is defined as any normally recognisable word (hyphenated words count as one), or any series of characters that constitute a recognisable unit such as reference numbers (e.g. 2123) or telephone numbers (e.g. 024 7647 0033) or dates (e.g. 11/12/05), and includes the space following the word and any associated punctuation.

4.6 Examples of Data Entry Errors

1. A given sentence in an email message might be:

Thank you for your message, received today, which I have forwarded...

A candidate version might be:

Thank you for your messigereceived today, which I have forwarded...

This is penalised as one data entry error only, as the data item is the word “message”, including both the comma following it and the space following the comma.

2. A given record in a database might be:

| | | | | |
|--------------------|--------------------|---------------|-------------|------------|
| FOZIA ROKED | TEAM LEADER | £47000 | 42KJ | YES |
|--------------------|--------------------|---------------|-------------|------------|

A candidate version might be:

| | | | | |
|--------------------|--------------------|---------------|-------------|------------|
| FOZI ROCKED | TEEM LENDER | £47000 | 42KJ | YES |
|--------------------|--------------------|---------------|-------------|------------|

This is penalised as TWO data entry errors only:

- one accuracy error for incorrectly spelling the first and last name in the first cell as both errors appear in the same data item (cell)
- the second accuracy error for incorrectly spelling **TEAM** and **LEADER** as both words appear in the same data item (cell)

3. In a graph, a data item is an entire heading such as:

VISITORS TO BIRMINGHAM

4. In certain parts of a web page or in artwork a data item is a block of text such as:

For more information:

Visit the Progress Media Website

4.7 Unit Format

Unit Description

A statement of skills the unit is designed to accredit.

Unit Content

This section describes the objectives that candidates will be assessed against. It is a mandatory requirement that candidates provide evidence of their skills, knowledge and understanding in relation to each assessment objective.

Marking Criteria

The marking criteria summarise the requirements for each assessment objective. These criteria are not absolute and it will sometimes be necessary for centre assessors to make judgements based on the existing criteria to assess unexpected or unusual candidate output. If in doubt, centre assessors should email the marking query to support@ocr.org.uk.

UNIT 1: INTEGRATED e-DOCUMENT PRODUCTION

Unit Description

This unit is designed to accredit vocational competencies in using a computer and its system software to create documents and integrate generic files, and files from different applications to produce integrated business documents. Candidates will develop a sound understanding of a computer's system and will keep health and safety risks to people and hardware at a minimum when using computers. They will appreciate why certain data may need to be protected and the importance of archiving data and will be able to perform these tasks. Candidates will produce a variety of business documents by integrating files of different types and will use a variety of formatting techniques to display documents effectively. Candidates will demonstrate skills in using mail merge facilities.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 78 Word Processing Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. where the criteria requires a printout of a mail merge, if submitting electronically a print to pdf or similar file type is acceptable.](#)

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 78. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – Integrated e-Document Production | |
|--|--|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 access, open, save, protect and print files | |
| a access/open generic and/or non-generic files | <ul style="list-style-type: none"> distinguish between documents/files and executable applications and appreciate the function of file extensions understand common methods for opening/accessing/importing generic and non-generic files identify and access appropriate software for the task |
| b save files in appropriate format | <ul style="list-style-type: none"> understand how to save files in generic and non-generic format and appreciate how and why files are saved in a particular way understand the use of master documents and know how to economise on usage of disk space when saving files (for example not saving merged files) |
| c protect file(s) | <ul style="list-style-type: none"> understand how to prevent others from editing a master document (e.g. read only) |
| d print a range of business documents | <ul style="list-style-type: none"> understand how to print master documents understand how to print mail merged documents |
| e produce a screen printout to evidence file protection | <ul style="list-style-type: none"> understand how to produce screen printouts |
| f archive files | <ul style="list-style-type: none"> understand how to archive files |
| 2 create and print mail merge documents and use mail merge features | |
| a create a mail merge master document | <ul style="list-style-type: none"> understand how to create a mail merge master document understand how to save a master document and appreciate why a merged document should not be saved |
| b insert merge codes in master document | <ul style="list-style-type: none"> understand how to insert merge codes using appropriate spacing |
| c format mail merge documents | <ul style="list-style-type: none"> understand how to adjust margins and change the font style and size and appreciate the need for a consistent style |
| d create mail merge query | <ul style="list-style-type: none"> understand how to select merge data on one criterion |
| e perform mail merge | <ul style="list-style-type: none"> understand how to perform a mail merge |

| | |
|--|--|
| 3 integrate files to create an integrated business document | |
| a import a text file b import data file c import image d import graph | <ul style="list-style-type: none"> • understand the procedures when transferring data between files • understand the need for presenting documents as specified • understand how to import, place and format text files, data files, images and graphs and appreciate why it might be in that format • understand the importance of maintaining the original proportions of images and graphs • understand the importance of maintaining the integrity of imported data |
| 4 format tabular data | |
| a insert table | <ul style="list-style-type: none"> • appreciate the use and purpose of indenting text and be aware of the various methods of achieving this • understand how to create a table |
| b set column widths | <ul style="list-style-type: none"> • understand how to alter column widths |
| c set column/cell alignment | <ul style="list-style-type: none"> • understand how to align tabular data (including decimal alignment) |
| d apply gridlines and borders/shading | <ul style="list-style-type: none"> • understand how to add/remove gridlines, borders and shading and the importance of readability |
| 5 enter data accurately and amend existing data | |
| a enter text/numeric data in specified format | <ul style="list-style-type: none"> • understand the need for accurate data entry in the production of documents and the importance of proofreading both on-screen and on printed output |
| b make amendments to document(s) | <ul style="list-style-type: none"> • understand how to amend a document (e.g. move, delete, insert, copy) |
| c use advanced search and replace | <ul style="list-style-type: none"> • understand how to use advanced search and replace facilities (e.g. case sensitive, whole word etc) and appreciate the advantages of using the search and replace function over manual methods |
| d use special symbols/superscript/subscript | <ul style="list-style-type: none"> • understand how to insert special symbols (e.g. é, ê, ä, ©, €) • understand how to format characters as subscript/superscript |
| e use software facilities to check spelling | <ul style="list-style-type: none"> • understand the purpose and limitations of spellchecker and grammar-checkers |

| 6 format page layout and manipulate text according to a house style | |
|--|---|
| a set page orientation | <ul style="list-style-type: none"> • understand the use and purpose of changing page orientation |
| b set up page layout | <ul style="list-style-type: none"> • understand the major layout and formatting functions of word processors (page breaks, paragraph breaks, line spacing, margins) • understand the reasons for and how to avoid widows and orphans and subheadings split from following text • understand how to apply consistent spacing between paragraphs and above/below subheadings |
| c insert headers and footers | <ul style="list-style-type: none"> • understand the use and purpose of headers and footers |
| d insert automatic fields in headers/footers | <ul style="list-style-type: none"> • understand the use and purpose of including automatic fields in headers and footers (e.g. filenames, dates and page numbers) and understand the use and purpose of using specified English date formats (day, month, year) |
| e use bullets/numbering | <ul style="list-style-type: none"> • understand how to apply bullets and numbering |
| f apply house style | <ul style="list-style-type: none"> • understand the purpose of and adhere to a specified house style |

Marking Criteria for Unit 1: Integrated e-Document Production

In order to pass the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- results of mail merge missing in their entirety
- a specified datafile is missing
- a specified image is missing
- a specified graph is missing
- a missing document printout *

Accuracy errors are incurred for each instance of:

- an error in inputting data (see list of data items)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Data items for Unit 1, Integrated e-Document Production are:

- a word in input data
- a code in mail merge
- headers and footers

Additional, un-requested formatting is not penalised unless candidates are instructed otherwise (for example, if bold has been applied when the instruction for a style states 'normal' or 'italic only', this would incur an accuracy error).

Consistent use of case is not penalised if used appropriately (for example, use of upper case for headings in a table even if presented as sentence case in the assignment).

Lack of a capital at the start of a sentence and/or for proper nouns is penalised per data item.

Upper case letter(s) appearing in the middle or at the end of word(s) keyed in using lower case are penalised per data item.

Any other instance of inconsistent use of case is penalised as one accuracy error per assignment.

* Screen printouts are required to evidence certain objectives. Where a screen printout is an assessment objective this will be penalised as one accuracy error for the missing printout. Note, however, that if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout provides evidence. Where a screen printout is not an assessment objective, candidates will only be penalised under the assessment objective(s) for which there is no evidence. **Centres must ensure the screen prints are large enough to read.**

Detailed Marking Criteria for Unit 1: Integrated e-Document Production

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 access, open, save, protect and print files | |
|---|--|
| a | <p>access/open generic and/or non-generic files</p> <ul style="list-style-type: none"> Failure to access and/or open the provided file(s) is penalised as one accuracy error each time that a file is not opened or accessed without help. |
| b | <p>save files in appropriate format</p> <ul style="list-style-type: none"> Failure to save a document is penalised as one accuracy error on each occasion that the file is not saved. Failure to save file(s) as specified is penalised as one accuracy error per assignment. <p>Unless specified in the assignment, candidates may save the file in any appropriate format e.g. the provided .rtf file may be saved as a .doc or as a .rtf.</p> <p>Unless an automatic filename is displayed on the printout, the local assessor should observe this objective. A note of any error(s) in saving and/or using the specified filename should be noted on the appropriate printout.</p> |
| c | <p>protect file(s)</p> <p>The centre assessor must check that the file has been protected as specified.</p> <ul style="list-style-type: none"> Failure to protect file(s) as specified (either to modify or to open) is penalised as one accuracy error per assignment. |
| d | <p>print a range of business documents</p> <ul style="list-style-type: none"> Any missing printouts (with the exception of screen printouts) are penalised as a critical error. |
| e | <p>produce a screen printout to evidence file protection</p> <ul style="list-style-type: none"> Failure to provide screen printout evidence that file(s) have been protected as specified is penalised as one accuracy error per assignment. <p>Note: If the candidate has set the file protection, but has not evidenced this on a screen printout the tutor may provide this evidence by taking the screen printout from the protected file. The tutor must note on the printout that the tutor has provided the screen printout.</p> |
| f | <p>archive files</p> <p>Any method of archiving is acceptable (for example, compressing a file by zipping, setting the file attributes to archive or moving files to a different storage area or create a folder called 'archive' and <u>move</u> the files into this folder. If candidates archive by moving files to a different folder, rather than zipping, there must be evidence of where the files were located prior to archiving and where they have been moved to).</p> <ul style="list-style-type: none"> Failure to produce evidence that files or folders have been archived is penalised as one accuracy error per assignment. |

| | |
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| 2 create and print mail merge documents and use mail merge features | |
| a | <p>create a mail merge master</p> <ul style="list-style-type: none"> • Penalised under 1d. |
| b | <p>insert merge codes in main document</p> <ul style="list-style-type: none"> • Missing or inaccurate merge codes are penalised as one accuracy error per code. • Additional unrequested codes are penalised as one accuracy error per assignment. |
| c | <p>format mail merge documents</p> <p>Candidates must format the mail merge document(s) as specified in the assignment. Formatting includes page orientation, margins, line spacing, paragraph spacing, page breaks and fonts (style, size, emphasis and alignment). There is a total tolerance of 6 mm on left and right margins and a total tolerance of 6 mm on top and bottom margins.</p> <ul style="list-style-type: none"> • Failure to format the mail merge document as specified is penalised as one accuracy error per assignment. <p><i>Additional unrequested formatting of the mail merge document is not penalised.</i></p> |
| d | <p>create mail merge query</p> <ul style="list-style-type: none"> • Errors in the mail merge query are penalised as one accuracy error per assignment. |
| e | <p>perform mail merge</p> <ul style="list-style-type: none"> • Failure to produce any evidence of a mail merge is penalised as a critical error. • Incomplete evidence of the mail merge is penalised as one accuracy error per assignment. |
| 3 integrate files to create an integrated business document | |
| a | <p>import a text file</p> <ul style="list-style-type: none"> • Failure to produce any evidence of importing a text file is penalised as a critical error. • Unrequested amendments to the text file are penalised once only per assignment. |
| b | <p>import a data file</p> <ul style="list-style-type: none"> • Failure to produce any evidence of importing a data file is penalised as a critical error. • Additional, missing or unrequested amendments to data in the imported data file and/or the data file not displayed in the position specified is penalised as one accuracy error per assignment. <p>Note: If the data file is not positioned within the margins of the page this is penalised under 6b.</p> |

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|------------------------------|--|
| c | import an image <ul style="list-style-type: none"> • Failure to produce any evidence of importing an image file is penalised as a critical error. • If the image file is not displayed in full and/or in the position specified, this is penalised as one accuracy error per assignment. <p>Note: If the image is not positioned within the margins of the page this is penalised under 6b.</p> |
| d | import a graph <ul style="list-style-type: none"> • Failure to produce any evidence of importing a graph is penalised as a critical error. • Additional or missing data and/or unrequested amendments to the graph and/or if the graph is not displayed in the position specified is penalised as one accuracy error per assignment. <p>Imported graphs will be accepted with or without the border showing.</p> <p>Note: If the graph is not positioned within the margins of the page this is penalised under 6b.</p> |
| 4 format tabular data | |
| a | insert table <ul style="list-style-type: none"> • Failure to insert the table as specified and/or inserting additional rows/columns is penalised as one accuracy error per assignment. <p>Note: Candidates will also be penalised under the appropriate assessment objective for any other assessment objectives not evidenced as a result of the table not being inserted.</p> |
| b | set column widths <ul style="list-style-type: none"> • Failure to set the column widths as specified is penalised as one accuracy error per assignment. |
| c | set column/cell alignment <ul style="list-style-type: none"> • Failure to set the column alignment as specified is penalised as one accuracy error per assignment. |
| d | apply gridlines and borders/shading <ul style="list-style-type: none"> • Failure to apply gridlines and/or borders and shading as specified is penalised as one accuracy error per assignment. |

| 5 enter data accurately and amend existing data | |
|--|---|
| a | <p>enter text/numeric data in specified format</p> <p>The text should be entered as specified in the assignment. Where paragraphs of text are keyed in these must be in 'wrapped' or 'free-flowing' paragraphs, with consistent line spacing between paragraphs. Inconsistent line spacing between paragraphs is penalised as one accuracy error per assignment. Either one or two spaces are acceptable after items of punctuation, but the spacing need not be consistent.</p> <ul style="list-style-type: none"> • Errors in entering data are penalised as one accuracy error per data item (a word) • Consistent use of case is not penalised if used appropriately (for example, use of capitals for a heading or an entire notice), even if presented as sentence case in the assignment. Lack of a capital at the start of a sentence and/or for proper nouns is penalised per data item. Capital letter(s) appearing in the middle or at the end of word(s) keyed in using lower case are penalised per data item. Any other instance of inconsistent use of case is penalised as one accuracy error per assignment. • Additional space(s) at the start of a paragraph that result in inconsistent alignment is penalised as one accuracy error per assignment. • Use of more than two spaces after punctuation is penalised as one accuracy error per assignment. • Use of more than one space between words is penalised as one accuracy error per assignment. |
| b | <p>make amendments to document(s)</p> <p>Amendments must be made in the position indicated. Spacing before and after the amendments must be consistent with the spacing in the rest of the document. Where a page break is inserted any text moved to the next page must start on the first line of the new page and the first word must be aligned with the left margin.</p> <ul style="list-style-type: none"> • Failure to make a specified amendment(s) to the document is penalised as one accuracy error for each amendment not carried out as specified; including where a candidate has deleted more than the requested text. |
| c | <p>use advanced search and replace</p> <p>Each occurrence of the specified word must be amended to the new word, with appropriate spacing (as outlined under 5a) either side of the replaced word. Only whole words must be replaced and the case must be matched.</p> <ul style="list-style-type: none"> • Errors in the replaced word or failure to replace any or all instances of the word as outlined above and/or additional replacements are penalised as one accuracy error per assignment. • Unrequested changes to words as a result of not using 'find whole words only' is penalised as one accuracy error per assignment. |
| d | <p>use special symbols/superscript/subscript</p> <p>The font of the special character may be different, but must be in the same case and style as the surrounding text (ie if the text is sans serif and lower case, the special character must also be in sans serif and lower case).</p> <ul style="list-style-type: none"> • Failure to insert the special symbol/superscript/subscript character and/or to match the font style and/or case is penalised as one accuracy error per assignment. |

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| e | <p>use software facilities to check spelling</p> <p>Candidates must use an English (UK) spell checker. Where there are two or more alternative English spellings of a word, either spelling may be used but the selected spelling must be applied consistently. Candidates must not change the grammar of the document (for example, they should not replace 'that' with 'which').</p> <ul style="list-style-type: none"> • Failure to correct any or all instances of errors in spelling and/or failure to use the spell checker as outlined above is penalised as one accuracy error per assignment. |
| <p>6 format page layout and manipulate text according to a house style</p> | |
| a | <p>set page orientation</p> <ul style="list-style-type: none"> • Failure to set page orientation as specified is penalised as one accuracy error per assignment. |
| b | <p>set up page layout</p> <p>This objective applies to all documents with the exception of the mail merge documents, which are penalised separately under Assessment Objective 2c.</p> <p>For any or all of the following, candidates will be penalised a maximum of one accuracy error per assignment:</p> <ul style="list-style-type: none"> • Incorrect margins • Items not positioned with the page margins * • Imported file(s) split across pages • Inconsistent paragraph spacing (see note below) • Unrequested/inconsistent paragraph/line indentation • Inconsistent line spacing (but see note below) • Line spaces at the top of pages (unless already penalised under 5b) • Subheadings not followed by at least two lines of related text • Widows and orphans (one line of a paragraph separated from the rest of the related text at the top or bottom of a page) • Text, images and lines not superimposed (unless specified). <p>* Borders around an image, graph, data file(s) and table(s) may extend into the page margin provided that the image/graph/data does not.</p> <p>Note: There is a total tolerance of 6 mm on left and right margins and a total tolerance of 6 mm on top and bottom margins. Where double or 1½ line spacing has been applied; the preceding and/or following paragraph spacing may follow either the line spacing of either the previous or subsequent paragraph and this need not be consistent. There must be at least one line space above and below the inserted graph, data file and table but this need not be consistent. The spacing above all subheadings must be consistent and the spacing below all subheadings must be consistent but the spacing above the paragraph need not be the same as the spacing below the paragraph. Spacing between all paragraphs in single line spacing must be consistent.</p> |

| | |
|---|---|
| c | <p>insert headers and footers</p> <p>Headers/footers must appear in the top/bottom margin area of the document. Left, right margins in headers and footers need not match the page margins of the document. Font style in headers/footers is not penalised.</p> <ul style="list-style-type: none"> • Failure to insert headers/footers as specified and/or data error(s) in headers/footers is penalised as one accuracy error per assignment. <p>Note: An additional penalty will be incurred under 6d if the missing header/footer also required an automatic field.</p> |
| d | <p>insert automatic fields in headers/footers</p> <ul style="list-style-type: none"> • Failure to insert an automatic field as specified is penalised as one accuracy error per assignment. |
| e | <p>use bullets/numbering</p> <p>Any style of bullet character or numbering may be used. Left aligned bulleted or numbered items may be indented from the left margin but the display of the bulleted/numbered items must be consistent. The size of the bullet character (even if not consistent) is not penalised.</p> <ul style="list-style-type: none"> • Failure to use bullets or numbering as specified and/or inconsistent display of bullets is penalised as one accuracy error per assignment. |
| f | <p>apply house style</p> <p>Candidates will be required to apply styles to various parts of the text during the assignment.</p> <ul style="list-style-type: none"> • Failure to apply any or all of the text styles specified is penalised as one accuracy error per style. <p>Note: No penalty is applied if any web/email addresses in the document is displayed as a hyperlink (underlined and/or in a different font style).</p> <p>Note: The formatting of the mail merge document is penalised separately under Assessment Objective 2c.</p> |

Marking Reference Grid for Unit 1: Integrated e-Document Production

Data items:

- a word in input data
- a code in mail merge
- headers and footers

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|---|--------------------------|---|--------------------|----------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | access/open generic and/or non-generic files | | | ✓ | |
| 1b | save files in appropriate format * | | ✓ | ✓ | |
| 1c | protect file(s) | | ✓ | | |
| 1d | print a range of business documents | ✓ | | | |
| 1e | produce a screen printout to evidence file protection | | ✓ | | |
| 1f | archive files | | ✓ | | |
| 2a | create a mail merge master | Penalised under 1d | | | |
| 2b | insert merge codes in main document * | | ✓ | | ✓ |
| 2c | format mail merge documents | | ✓ | | |
| 2d | create mail merge query | | ✓ | | |
| 2e | perform mail merge * | ✓ | ✓ | | |
| 3a | import a text file * | ✓ if entirely missing | ✓ if incomplete or incorrectly positioned | | |
| 3b | import a data file * | ✓ if entirely missing | ✓ if incomplete or incorrectly positioned | | |
| 3c | import an image * | ✓ if entirely missing | ✓ if incomplete, distorted or incorrectly positioned | | |
| 3d | import a graph * | ✓ | ✓ if incomplete, illegible or incorrectly positioned | | |
| 4a | insert table | | ✓ | | |
| 4b | set column widths | | ✓ | | |
| 4c | set column/cell alignment | | ✓ | | |
| 4d | apply gridlines and borders/shading | | ✓ | | |
| 5a | enter text/numeric data in specified format * | | ✓ | | ✓ |
| 5b | make amendments to document(s) | | | ✓ per amendment | |
| 5c | use advanced search and replace | | ✓ | | |

| | | | | | |
|----|--|--|---|------------------|--|
| 5d | use special symbols/superscript/subscript | | ✓ | | |
| 5e | use software facilities to check spelling | | ✓ | | |
| 6a | set page orientation | | ✓ | | |
| 6b | set up page layout | | ✓ | | |
| 6c | insert headers and footers | | ✓ | | |
| 6d | insert automatic fields in headers/footers | | ✓ | | |
| 6e | use bullets/numbering | | ✓ | | |
| 6f | apply house style | | | ✓ (per style) | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

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UNIT 2: MANIPULATING SPREADSHEETS AND GRAPHS

Unit Description

This unit is designed to accredit user competencies in using spreadsheets and graphs software to use complex formulae and functions and to analyse and interpret data producing a variety of charts and graphs from existing data. Candidates will extend familiarity with the software to be used, and will demonstrate a sound understanding of the use and manipulation of complex formulae and numerical formatting and data presentation concepts for the correct use of graphing tools.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 70 Spreadsheet Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. spreadsheets unit 2 requires a formula printout, if submitting electronically a copy of the file showing formulas is not acceptable, a formula print to a pdf or similar file is acceptable.](#)

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 70. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – Manipulating Spreadsheets and Graphs | |
|--|--|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 identify, input and amend data in spreadsheet software accurately | |
| | <ul style="list-style-type: none"> • understand how to open data from generic files and appreciate why it might be in that format • identify appropriate software for the task to create a spreadsheet/graph(s) • understand correct procedures for using the chosen software • appreciate the differences between data modelling software and purely graphical alternatives (e.g. live data modelling) • understand who the information is for also when and how it will be used |
| a insert text and numeric data | <ul style="list-style-type: none"> • appreciate the need for accuracy when inputting data and the importance of checking output against expectations |
| b insert row/column | <ul style="list-style-type: none"> • understand the software's tools for adding rows and columns |
| c delete/row column | <ul style="list-style-type: none"> • appreciate the difference between deleting, hiding and clearing rows and columns |
| d amend/delete text and numeric data | <ul style="list-style-type: none"> • understand the need for accuracy when amending data in a spreadsheet, such as: cut, copy, paste, drag and drop, find and replace |
| 2 use formulae and functions in spreadsheets | |
| a use formulae that produce correct results | <ul style="list-style-type: none"> • understand the use of mathematical operators (+ - / * <>) in formulae • appreciate the need for accuracy in the construction of formulae/functions • understand how amendments to data may affect dependent formulae and appreciate the uses of this in the efficient modelling and projection of data |
| b replicate formulae into correct cells | <ul style="list-style-type: none"> • understand the use and purpose of relative/absolute and to appreciate the effects on relative/absolute cell references and the mixed cell referencing and the advantages in replication • understand the use and purpose of not replicating zero values over blank cells |
| c use relative cell references | |
| d use absolute/mixed cell references | |
| e use a variety of cell references | |
| f name and use named cell | <ul style="list-style-type: none"> • understand how to name cells and how they are used in formulae and appreciate their advantages • appreciate the use of named ranges |
| g use a reference to a cell in another spreadsheet | <ul style="list-style-type: none"> • understand spreadsheet linking and how to use linked data in formulae |

| | | |
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| h | use a range of functions that produce correct results | <ul style="list-style-type: none"> understand the use of standard data functions (SUM, SUMIF, AVERAGE, COUNT/COUNTA/COUNTIF, MIN, MAX and IF) and appreciate the advantages over manually derived formulae |
| i | use tools and techniques for analysing data – AutoFilter and Sort | <ul style="list-style-type: none"> appreciate the use of appropriate tools and techniques for analysing more complex data, such as AutoFilter and Sort (maintaining integrity of data) |
| 3 create exploded pie, bar/line graphs, and xy scatter graphs from given data | | |
| a | create graph(s) | <p>exploded pie chart:</p> <ul style="list-style-type: none"> understand the importance of emphasising particular data <p>bar/line graph:</p> <ul style="list-style-type: none"> understand how to compare many sets of similar data using a bar/line chart understand that lines and bars/columns can be displayed on one graph <p>xy scatter graph:</p> <ul style="list-style-type: none"> understand the different uses of scatter graphs (plot data to identify trends, plot a definite relationship between two variables x and y) distinguish between pie charts, line graphs and bar/column charts and comparative graphs/charts and understand how to create and format them |
| b | select data set(s) | <ul style="list-style-type: none"> understand how to select a variety of data set(s) for display in graphical format: <ul style="list-style-type: none"> select single data set select comparative data set select large subset of data select data set from non-adjacent columns/rows |

| 4 use formatting and alignment techniques in spreadsheet(s) and graphs/charts | |
|--|---|
| a display data using a variety of formats | <ul style="list-style-type: none"> • understand how to format numerical data to display in integer (0 decimal places) and/or in 2 decimal places • understand how to format numerical data to display a currency sign and appreciate that currency data is not always presented to 2 decimal places • understand the purpose and effect of formatting numeric data (percentage, date, time, negative, currency, general) • understand how to set text orientation • understand the use and purpose of aligning data both vertically and horizontally • understand the use and purpose of wrapping cell contents • understand the use and purpose of merging cells together |
| b enter titles, data labels and axis titles | <ul style="list-style-type: none"> • appreciate the need to display content on charts such as titles and labels • understand how to amend default/automatic formatting where necessary • distinguish between titles, axes titles, legends and labels and understand how to set and amend them |
| c enter and amend axis, intervals and upper and lower limits | <ul style="list-style-type: none"> • understand how to amend the graph/chart to display specific upper and lower limits for continuous data |
| d apply/remove legend | <ul style="list-style-type: none"> • understand the need for a legend to correctly identify the data series displayed on chart |
| e ensure comparative data is distinctive | <ul style="list-style-type: none"> • appreciate the need to ensure comparative data is distinctive, and the effects of printing coloured graphs in grey |
| f insert and position text box | <ul style="list-style-type: none"> • understand how to use text boxes on a graph/chart to display additional information |
| 5 save and print spreadsheet(s) and graphs/charts | |
| a save and close spreadsheet | <ul style="list-style-type: none"> • appreciate the use of save, save as and close • understand the importance of saving spreadsheet in suitable format |

| | |
|---|---|
| <p>b set page layout including header/footer and automatic fields</p> | <ul style="list-style-type: none"> • understand the use and purpose of changing the default print settings • understand the use and purpose of altering margin (top, bottom, left, right) • understand the use and purpose of changing page orientation • understand the use and purpose of automatic data in headers and footers to include: filename, sheet name, page numbers and date • understand the use of print on one page by adjusting margins and text size • understand how to fit a spreadsheet to a specified number of pages |
| <p>c print the spreadsheet with data showing in full as a table</p> | <ul style="list-style-type: none"> • understand how to print the spreadsheet showing an appreciation of the changes to the display and layout • appreciate the difference between and the purpose of cell contents and displayed values |
| <p>d print document selection</p> | <ul style="list-style-type: none"> • understand the use of print facilities to print documents and sections/subsets of data accurately • understand how to hide/unhide columns and rows and appreciate the reason for doing this |
| <p>e print the spreadsheet with formulae showing in full and displaying column and row headings</p> | <ul style="list-style-type: none"> • understand how to set the spreadsheet to print with the formulae showing and appreciate the changes to the display that may result • appreciate the need to display row (1,2,3...)/column (A,B,C...) headings in a formulae printout |
| <p>f print the spreadsheet displaying gridlines</p> | <ul style="list-style-type: none"> • understand how to apply/remove gridlines in a printout |
| <p>g print graph(s) on a sheet separate to the data source</p> | <ul style="list-style-type: none"> • understand how to print graphs showing an appreciation of the changes to the display and layout <ul style="list-style-type: none"> ○ exploded pie ○ bar/line ○ xy scatter |

Marking Criteria for Unit 2: Manipulating Spreadsheets and Graphs

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- incorrect numeric data (as a result of data entry, formulae or sort results)
- missing formula
- formula that will not consistently produce the correct results
- failure to insert specified row/column
- failure to delete data in specified row/column
- failure to use a reference to a cell in another spreadsheet
- incorrect filter results
- failure to maintain integrity of data once sorted
- failure to create specified chart
- missing data or incorrect values on graph/chart due to incorrect data selection
- labels and/or legend do not identify data clearly
- using text instead of a figure e.g. "0" or 'zero' instead of 0.
- a missing printout

Accuracy errors are incurred for each instance of:

- an error in inputting text data (see list of data items)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Note: If candidates hide more (or select less) than the specified data they will also incur the appropriate penalty under each assessment objective for which the hidden data would have provided evidence.

Data items for Unit 2, Manipulating Spreadsheets and Graphs are:

- text in a table cell in spreadsheets
- a filename
- header and footer
- a heading in a graph
- an axis title in a graph
- a legend in a graph

Consistent use of case is not penalised if used appropriately (for example use of upper case for text even if presented as lower case in the assignment). Lack of a capital for proper nouns is penalised per data item. Any other instance of inconsistent use of case is penalised as one accuracy error per assignment.

Detailed Marking Criteria for Unit 2: Manipulating Spreadsheets and Graphs

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 identify, input and amend data in spreadsheet software accurately | |
|--|---|
| a | <p>insert text and numeric data</p> <ul style="list-style-type: none"> • Errors in text are penalised once per cell • Errors in numerical data as a result of data entry or formulae results are penalised as a critical error. <p>Consistent use of upper, lower, sentence or title case (even if different from that displayed in the original data file) is not penalised. Inconsistent use of case is penalised once only per assignment.</p> |
| b | <p>insert row/column</p> <ul style="list-style-type: none"> • Failure to insert the row/column is penalised as a critical error • Failure to insert the row/column as specified (for example in an incorrect position) is penalised as one accuracy error per instruction, but see note below. <p>Note: incorrect numeric data as a result of failing to insert the row/column as specified is penalised under 1a.</p> |
| c | <p>delete/row column</p> <ul style="list-style-type: none"> • Failure to delete the data in the specified row/column is penalised as a critical error • Deleting the incorrect row/column (instead of, or in addition to, the specified row/column) is penalised as a critical error • Deleting only the data, leaving blank (or hidden) cells is penalised as one accuracy error per assignment. <p>Note: incorrect numeric data and/or formula that will not consistently produce correct results, as a result of failing to delete row/column as specified is penalised under 1a and/or 2a or 2h.</p> |
| d | <p>amend/delete text and numeric data</p> <ul style="list-style-type: none"> • Failure to amend/delete numeric data as specified is penalised as a critical error • Failing to amend/delete text data as specified is penalised as one accuracy error per data item (the contents of a table cell). <p>Note: Consistent use of upper, lower, sentence or title case is not penalised. Inconsistent use of case is penalised once only per assignment.</p> |

| 2 use formulae and functions in spreadsheets | |
|--|--|
| a | <p>use formulae that produce correct results</p> <p>Candidates may use any formula that will consistently produce the correct results except where a function or format is specified in the assignment.</p> <ul style="list-style-type: none"> • Failure to produce the correct results is penalised as a critical error • Any missing formula is penalised as a critical error • If text is used instead of a figure e.g. "0" or 'zero' instead of 0, this will be penalised as a critical error • Any formula that will not generate consistently correct results (e.g. that has generated the correct results by chance) is penalised as a critical error • Failure to use a specified format is penalised as one accuracy error per instruction • Where candidates should have used a relative reference for column and row but have instead used an absolute for the column but relative for the row e.g. \$C9 instead of C9, they will incur one accuracy error per assignment. <p>Note: If a candidate uses a formula (such as B1+B2+B3) where the use of a function has been specified this is penalised under 2h.</p> |
| b | <p>replicate formulae into correct cells</p> <p>All replicated formulae must match the structure of the source formula.</p> <ul style="list-style-type: none"> • Failure to replicate the source formula and/or replicating formula over blank cells is penalised as one accuracy error per assignment. <p>Note: Any missing formula and/or formula that will not consistently produce the correct results is penalised under 2a.</p> |
| c | <p>use relative cell references</p> <ul style="list-style-type: none"> • Failure to use relative cell references as specified is penalised as one accuracy error per instruction. <p>Note: Any formula that will not consistently produce the correct results is penalised under 2a.</p> |
| d | <p>use absolute/mixed cell references</p> <ul style="list-style-type: none"> • Failure to use absolute/mixed cell references as specified is penalised as one accuracy error per instruction. <p>Note: Any formula that will not consistently produce the correct results is penalised under 2a.</p> |
| e | <p>use a variety of cell references</p> <ul style="list-style-type: none"> • Failure to use relative/absolute/mixed cell references as specified is penalised as one accuracy error per instruction. <p>Note: Any formula that will not consistently produce the correct results is penalised under 2a.</p> |

| | |
|---|---|
| f | <p>name and use named cell</p> <ul style="list-style-type: none"> • Failure to name the specified cell is penalised as one accuracy error per assignment • Failure to use a named cell in a formula as specified is penalised as one accuracy error per assignment. <p>If candidates have named the cell but do not then use it where specified this will incur one accuracy error. If a candidate has not named a cell they will incur two accuracy errors, one for not naming the cell and one for not using the named cell where specified.</p> <p>Note: Any formula that will not consistently produce the correct results is penalised under 2a.</p> |
| g | <p>use a reference to a cell in another spreadsheet</p> <ul style="list-style-type: none"> • Failure to use a reference to a cell in another spreadsheet to link data in a formula as specified is penalised as a critical error. <p>Note: Any formula that will not consistently produce the correct results is penalised under 2a.</p> |
| h | <p>use a range of functions that produce correct results</p> <p>Candidates may use any function that will consistently produce the correct results. For example redundant use of the SUM function is not penalised. Where the use of a function is specified, that function must be used. Use of a manually derived formula in place of a function is penalised once per function.</p> <ul style="list-style-type: none"> • Failure to produce the correct results is penalised as a critical error • Any missing formula is penalised as a critical error • Any function that will not consistently generate correct results (e.g. that has generated the correct results by chance) is penalised as a critical error • Use of a manually derived formula (that will consistently generate the correct results) in place of a function is penalised as one accuracy error per instruction, e.g. using (A3+A4+A5) instead of SUM(A3:A5). |
| i | <p>use tools and techniques for analysing data – AutoFilter and Sort</p> <ul style="list-style-type: none"> • Incorrect filter results (on available data) is penalised as a critical error • Failure to sort data as specified is penalised as one accuracy error per instruction. However if the integrity of corresponding data is not maintained this is penalised as a critical error • Performing a sort in ascending instead of descending order (or vice versa) is penalised as one accuracy error per instruction. However, if the integrity of corresponding data is not maintained this is penalised as a critical error. <p>If the filter results are incorrect due to a previous accuracy error, this is not penalised against this objective as the candidate has filtered the data successfully using the correct criterion on the data they have available.</p> |

| | |
|--|--|
| 3 create exploded pie, bar/line graphs, and xy scatter graphs from given data | |
| a | <p>create graph(s)</p> <ul style="list-style-type: none"> • Failure to select the specified graph/chart type is penalised as a critical error • Failure to select the specified sub-type (for example a pie chart instead of an exploded pie chart) for a graph/chart is penalised as one accuracy error per instruction. |
| b | <p>select data set(s)</p> <ul style="list-style-type: none"> • missing data or incorrect values on graph/chart due to incorrect data selection is penalised as a critical error • missing data or incorrect values as a result of plotting data against the wrong axis is penalised as a critical error • failure to evidence correct selection of data is penalised as a critical error • additional data as a result of incorrect data selection is penalised as one accuracy error per instruction. |
| 4 use formatting and alignment techniques in spreadsheet(s) and graphs/charts | |
| a | <p>display data using a variety of formats</p> <p>Candidates must format the display of the numerical data as specified, e.g. display as decimal to 2 decimal places - candidates must format the display of the numerical data to 2 decimal places; use of the currency symbol to achieve this, where currency symbol has <i>not</i> been requested, should be penalised as one accuracy error. In spreadsheets, where the currency symbol is specified, the currency symbol may be displayed anywhere to the left of the figures (within the cell). Addition of a currency symbol as text (rather than numerical formatting) should be penalised. Note that currency format does not necessarily imply data should be formatted to 2 decimal places - the number of decimal places will be explicitly stated. Where text wrap is applied to cell content, candidates will be penalised if words are split.</p> <ul style="list-style-type: none"> • Failure to apply text formatting, and/or alignment (horizontal/vertical - numeric and text), and/or merging cells and/or wrapping cell content as specified is penalised as one accuracy error per assignment • Failure to apply numeric formatting as specified is penalised as one accuracy error per instruction. |
| b | <p>enter titles, data labels and axis titles</p> <ul style="list-style-type: none"> • Any missing and/or ineffective data label(s) and/or axes title(s) is penalised as a critical error • Data entry errors in titles, data labels and/or axis titles are penalised as one accuracy error per data item. <p>Additional unrequested headings, titles, and/or data labels are not penalised.</p> |
| c | <p>enter and amend axis, intervals and upper and lower limits</p> <ul style="list-style-type: none"> • Failure to enter and amend axis intervals and set upper and lower limits are penalised as one accuracy error per assignment, however, see note below. <p>Note: Missing data points as a result of failure to set/amend the upper and lower limits as specified will result in a critical error under 3b as there will be no evidence that the correct data has been selected.</p> |

| | |
|---|--|
| d | <p>apply/remove legend</p> <ul style="list-style-type: none"> • A legend that does not clearly identify the data set (when printed) is penalised as a critical error • Failure to remove a legend (where requested) is penalised as one accuracy error per assignment • If labels that clearly identify the dataset are used where a legend is specified, this is penalised as one accuracy error per instruction. <p>Note: If a black and white printer is used, candidates must ensure that data sets are distinctive when printed or they will incur a critical error.</p> |
| e | <p>ensure comparative data is distinctive</p> <ul style="list-style-type: none"> • Failure to ensure comparative data set is distinctive is penalised as a critical error. Ensure if pattern infill/shading is used it is distinctive in the legend and the graph/chart. |
| f | <p>insert and position text box</p> <ul style="list-style-type: none"> • Failure to insert the text box and/or display the text box as specified is penalised as one accuracy error per assignment. <p>The text box may be inserted in the plot or the chart area.</p> |
| <p>5 save and print spreadsheet(s) and graphs/charts</p> | |
| a | <p>save and close spreadsheet</p> <ul style="list-style-type: none"> • Failure to save the spreadsheet is penalised as one accuracy error on each occasion that the spreadsheet is not saved • Failure to use the specified filename is penalised as one accuracy error per assignment • Failure to evidence the filename where specified is penalised as one accuracy error per assignment • Failure to close the spreadsheet is penalised as one accuracy error per assignment. <p>Unless an automatic filename is displayed on the printout, the local assessor should observe this objective. A note of any error(s) in saving and/or using the specified filename should be noted on the appropriate printout.</p> <ul style="list-style-type: none"> • Failure to close the spreadsheet is a locally assessed objective. If the candidate fails to close the spreadsheet the local assessor must note this on the printout. |
| b | <p>set page layout including header/footer and automatic fields</p> <ul style="list-style-type: none"> • Failure to set margins/page orientation as specified and/or to fit to specified number of pages is penalised as one accuracy error per assignment • Failure to use headers/footers (including automatic fields) and/or errors in entering in data in header/footers is penalised as one accuracy error per assignment. <p>Note: Candidates may incur a maximum of two accuracy errors under this objective, one under the first bullet point and one under the second bullet point. However, failure to use an automatic filename may also incur the appropriate penalty under 5a. If candidates have omitted only the automatic filename from the header/footer this is penalised only under 5a no further penalty under 5b will be applied.</p> |

| | |
|---|---|
| c | <p>print the spreadsheet with data showing in full as a table</p> <p>Candidates must print the spreadsheet showing numerical totals, not formulae. All data must be displayed in full on the printout. Candidates should be aware of the need to check their printouts for correct printing of data as viewed on screen.</p> <ul style="list-style-type: none"> • A missing printout is penalised as a critical error • Failure to display numeric data in full is penalised as a critical error • Failure to display text in full is penalised as an accuracy error per cell. |
| d | <p>print document selection</p> <ul style="list-style-type: none"> • A missing printout is penalised as a critical error • Failing to hide/selecting more data than specified is penalised as one accuracy error per assignment. • Hiding more/selecting less data than specified is penalised as one accuracy error per assignment, however, see note below. <p>Note: If candidates hide more (or select less) than the specified data they will also incur the appropriate penalty under each assessment objective for which the hidden data would have provided evidence.</p> <p>If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. a copy of the spreadsheet file is not acceptable, a print to a pdf or similar file is acceptable.</p> |
| e | <p>print the spreadsheet with formulae showing in full and displaying column and row headings</p> <p>The specified formulae must be displayed in full on the printout. Candidates should be aware of the need to check their printouts for correct printing of data as viewed on screen. Truncated text on the formula printout is not penalised.</p> <ul style="list-style-type: none"> • A missing printout is penalised as a critical error • Failure to display formulae in full is penalised as one accuracy error per cell, regardless as to whether this is as a result of replicating. However, if the formula is not displayed in full and the content cannot be checked to clarify correct formula has been used, it will be penalised under 2a Any missing formula is penalised as a critical error. • Failure to show row and column headings is penalised as one accuracy error per assignment. <p>Note: Missing formula will be penalised under the appropriate assessment objective.</p> <p>Printing of unrequested row and column headings is not penalised.</p> |
| f | <p>print the spreadsheet displaying gridlines</p> <ul style="list-style-type: none"> • Failure to display gridlines as specified is penalised as one accuracy error per assignment. <p>Printing of unrequested gridlines is not penalised.</p> |
| g | <p>print graph(s) on a sheet separate to the data source</p> <p>If a black and white printer is used, candidates must ensure that data is clearly distinguishable when printed. If data is not clearly distinguishable when printed candidates will incur the penalty listed under the appropriate assessment objective.</p> <ul style="list-style-type: none"> • A missing printout is penalised as a critical error • Failing to print the graph/chart on a sheet separate to the data source is penalised as one accuracy error per assignment. |

Marking Reference Grid for Unit 2: Manipulating Graphs and Spreadsheets

Data items:

- text in a table cell in spreadsheets
- a filename
- header and footer
- a heading in a graph
- an axis title in a graph
- a legend in a graph

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|---|----------------|---------------------|------------------|----------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | insert text and numeric data * | ✓ (numeric) | | | ✓ (text) |
| 1b | insert row/column * | ✓ | | ✓ | |
| 1c | delete row/column * | ✓ | ✓ | | |
| 1d | amend/delete text and numeric data * | ✓ (numeric) | | | ✓ (text) |
| 2a | use formulae that produce correct results * | ✓ | | | |
| 2b | replicate formulae into correct cells (see also 2a) | | ✓ | | |
| 2c | use relative cell references (see also 2a) | | | ✓ | |
| 2d | use absolute/mixed cell references (see also 2a) | | | ✓ | |
| 2e | use a variety of cell references (see also 2a) | | | ✓ | |
| 2f | name and use named cell * (see also 2a) | | ✓ | | |
| 2g | use a reference to a cell in another spreadsheet (see also 2a) | ✓ | | | |
| 2h | use a range of functions that produce correct results * | ✓ | | ✓ | |
| 2i | use tools and techniques for analysing data – AutoFilter and Sort * | ✓ | | ✓ | |
| 3a | create graph(s) * | ✓ | | | |
| 3b | select data set(s) * | ✓ | | ✓ | |
| 4a | display data using a variety of formats * | | ✓ (text) | ✓ (numeric) | |
| 4b | enter titles, data labels and axis titles * | ✓ | | | ✓ |
| 4c | enter and amend axis, intervals and upper and lower limits * | ✓ | ✓ | | |
| 4d | apply/remove legend * | ✓ | ✓ | ✓ | |
| 4e | ensure comparative data is distinctive | ✓ | | | |
| 4f | insert and position text box | | ✓ | | |
| 5a | save and close spreadsheet * | | ✓ | ✓ | |
| 5b | set page layout including header/footer and automatic fields * | | ✓ | | ✓ |
| 5c | print the spreadsheet with data | ✓ | | ✓ | |

| | | | | | |
|----|--|---|---|---|--|
| | showing in full as a table * | | | | |
| 5d | print document selection * | ✓ | | ✓ | |
| 5e | print the spreadsheet with formulae showing in full and displaying column and row headings * | ✓ | | ✓ | |
| 5f | print the spreadsheet displaying gridlines | | ✓ | | |
| 5g | print graph(s) on a sheet separate to the data source * | ✓ | ✓ | | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

UNIT 3: CREATING AND USING A DATABASE

Unit Description

This unit is designed to accredit vocational competencies in using database software to create, maintain and interrogate a database file and generate output in a specified format. Candidates will be required to modify simple, non-relational databases, create queries using multiple selection criteria and create reports. Candidates will develop proficiency with the software to be used, along with a sound understanding of database reporting and formatting features.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 19 Database Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced.

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 19. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – Creating and Using a Database | | |
|---|---|---|
| Assessment Objectives | Knowledge, Skills and Understanding | |
| 1 | create a database file, set up fields and enter a range of information | |
| a | set up field headings | <ul style="list-style-type: none"> understand the structure of a database and how it is created |
| b | set up data types for fields | <ul style="list-style-type: none"> understand how to set the format of different field types e.g. number - integer, fixed, date understand the importance of setting dates to UK English format (day, month, year) appreciate the need for efficient data structures and be able to set appropriate field length understand how field characteristics can contribute to data validation |
| c | format field properties | <ul style="list-style-type: none"> understand the use and purpose of various field types (text, number, date/time, currency, auto number logic field) |
| d | enter records | <ul style="list-style-type: none"> understand how to enter data efficiently into a database e.g. use a data entry form and understand the importance of entering data accurately appreciate the purpose of encoding data in an efficient manner to maintain database efficiency understand the use of automated facilities for checking data such as spell checking and sorting |
| e | sort data in queries and reports | <ul style="list-style-type: none"> understand how to present data sorted (ascending, descending) and the effects on data of different types of sorting (alphabetical, numerical, chronological) maintaining integrity of data |
| f | save data (table, query, report) with specified name | <ul style="list-style-type: none"> understand how to save database information in a variety of formats understand how to present data in specified field order |
| g | print data | <ul style="list-style-type: none"> understand how to print database tables, queries, reports understand the need for checking that data is displayed in full on printed output |

| | |
|---|--|
| 2 import datafile, update and interrogate database using complex search criteria | |
| a import generic datafile | <ul style="list-style-type: none"> understand how to import data from generic files and appreciate why it might be in that format |
| b modify field characteristics | <ul style="list-style-type: none"> understand how to modify field characteristics e.g. name, type and size understand the use and importance of maintaining data integrity whilst modifying data |
| c update existing database | <ul style="list-style-type: none"> understand the use and purpose of adding, amending and deleting records and fields |
| d use logical and/or range operators in queries | <ul style="list-style-type: none"> understand how to create and use multiple criteria queries to extract data understand the use of range criteria in selecting data (<, >, <=, >=, =, <>) understand the use of AND, OR and NOT logical operators understand the use and purpose of using combined logical and range operators when defining search criteria (e.g. >= 16 AND <= 18) understand the use of wild cards when searching for data (* ? #) |
| e use a calculated field | <ul style="list-style-type: none"> understand the use and purpose of creating a new field for the purpose of performing a calculation understand how to construct calculations and the use of mathematical operators (* / - + %) |
| 3 plan and produce database reports in a variety of report formats | |
| a plan and produce a report | <ul style="list-style-type: none"> understand how to plan and produce reports from non-relational databases and using search results understand how to select and use a variety of report formats understand how to use shortcuts to improve efficiency e.g. wizard, autoreport |
| b set page layout including page header/footer, automatic fields and orientation | <ul style="list-style-type: none"> understand how to alter margins and page orientation understand the use and purpose of headers and footers understand how to insert custom headers and footers for specified data e.g. name, centre number understand the use and purpose of using automatic fields (filename, page number, date) in headers and footers |

| | | |
|---------------------------------|--|--|
| c | format data in reports | <ul style="list-style-type: none"> • understand how to format data in reports e.g. currency, decimal places, emphasise data • understand the importance of checking reports to ensure correct formatting and layout |
| d | display data in group format and include group headers | <ul style="list-style-type: none"> • understand how to present data in grouped format • understand the purpose of group headers |
| e | display report titles | <ul style="list-style-type: none"> • understand the importance, use and purpose of report titles |
| f | display summaries | <ul style="list-style-type: none"> • understand how to label group summaries e.g. average, sum, min, max |
| 4 print database reports | | |
| a | print report in specified format | <ul style="list-style-type: none"> • understand the production of reports/queries displaying fields and records in a specified order • display data in full • understand how to present reports in specified format e.g. table, list, query, tabular, label, columnar |
| b | print reports to specified number of pages | <ul style="list-style-type: none"> • understand how to fit reports to a specified number of pages |

Marking Criteria for Unit 3: Creating and Using a Database

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- error(s) in numeric field(s) (including dates and summaries)
- missing field(s)
- incorrect search results (on available data)
- integrity of data not maintained
- missing group headers
- a missing printout

Accuracy errors are incurred for each instance of:

- an error in inputting text or logical data (for each data item)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Data items for Unit 3, Creating and Using a Database are:

- the contents of a field within a record (each cell)
- a field heading
- a report title
- a summary label
- a footer
- a filename
- a query name
- a report name
- a table name

Consistent use of case is not penalised if used appropriately (for example, use of upper case for text even if presented as lower case in the assignment).

Lack of a capital for proper nouns is penalised per data item.

Any other instance of inconsistent use of case is penalised as one accuracy error per assignment.

Detailed Marking Criteria for Unit 3: Creating and Using a Database

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 create a database file, set up fields and enter a range of information | |
|--|--|
| a | <p>set up field headings</p> <ul style="list-style-type: none"> Errors in setting up field headings are penalised as one accuracy error per data item. |
| b | <p>set up data types for fields</p> <ul style="list-style-type: none"> Errors in setting up data types for fields are penalised as one accuracy error per field. <p>If a logic field is displayed as 'Yes/No' Centre assessors must check that the logic field has been set.</p> <p>If incorrect setting of the data type in a field result in other objectives not being evidenced, candidates will also be penalised under the appropriate objective(s).</p> |
| c | <p>format field properties</p> <ul style="list-style-type: none"> Errors in numeric data as a result of setting up incorrect field properties in a table are penalised as a critical error Errors in setting field properties in reports, summaries and text fields in a table, that result in data not being displayed in full are penalised as one accuracy error per data item (the contents of a cell) Failure to set up field properties as specified, that do not result in a critical error and/or in data not being displayed in full is penalised as one accuracy error per field. <p>Note: If errors in formatting the field properties result in an identical word/item not being fully displayed in several places within the same field this will be penalised as one accuracy error only, regardless of how many times that item/word is not fully displayed.</p> <p>Unless specified, date fields may be set in any English format. Candidates are not penalised if field lengths are greater than is necessary.</p> |
| d | <p>enter records</p> <ul style="list-style-type: none"> Errors in entering data in numeric fields (including the date field) are penalised as a critical error Errors in entering data in text or logic fields are penalised as one accuracy error per data item. <p>Although this should not be encouraged, candidates are not penalised for adding their personal details (name and centre number) as a record. Logic fields may be displayed with either boxes/ticks or Yes/No.</p> |

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| e | <p>sort data in queries and reports</p> <ul style="list-style-type: none"> • Failure to sort data as specified is penalised as one accuracy error per instruction. However, if the integrity of corresponding data is not maintained this is penalised as a critical error • Failure to sort the data in ascending/descending order as specified is penalised as one accuracy error per assignment. <p>Where there is no instruction to sort data, records may be presented in any order.</p> |
| f | <p>save data (table, query, report) with specified name</p> <ul style="list-style-type: none"> • Failure to save the data is penalised as one accuracy error on each occasion that a table, query and/or report is not saved • Failure to save the data with the specified name is penalised as one accuracy error per assignment. <p>Unless an automatic filename is displayed on the printout, the local assessor should observe this objective. A note of any error(s) in saving and/or using the specified filename must be noted on the appropriate printout.</p> |
| g | <p>print data</p> <ul style="list-style-type: none"> • Any missing printouts are penalised as a critical error. |
| 2 import datafile, update and interrogate database using complex search criteria | |
| a | <p>import generic datafile</p> <ul style="list-style-type: none"> • Failure to access and/or open the provided generic data file without assistance is penalised as one accuracy error per assignment. |
| b | <p>modify field characteristics</p> <ul style="list-style-type: none"> • Errors in numeric data as a result of failing to modify the field characteristics are penalised as a critical error • Errors in text or logic fields as a result of failing to modify the field characteristics are penalised as one accuracy error per data item • Failure to modify the field characteristics as specified, that do not result in a critical error and/or in data not being displayed in full is penalised as one accuracy error per field. <p>Unless specified, date fields may be set in any English format. Candidates are not penalised if field lengths are greater than is necessary.</p> |
| c | <p>update existing database</p> <ul style="list-style-type: none"> • Failure to update data in numeric fields (including date fields) as specified is penalised as a critical error • Failure to update data in text or logic fields as specified is penalised as one accuracy error per data item |

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| d | <p>use logical and/or range operators in queries</p> <ul style="list-style-type: none"> • Incorrect query results are penalised as a critical error. <p>Incorrect results due to an earlier accuracy error do not incur a second penalty. Local Assessors must note the accuracy error(s) on any/all printouts where the earlier error has resulted in missing/incorrect records being printed.</p> |
| e | <p>use a calculated field</p> <ul style="list-style-type: none"> • Failure to use a calculated field is penalised as a critical error • Incorrect results in a calculated field are penalised as a critical error • Errors in the field heading of a calculated field are penalised as one accuracy error per data item. |
| <p>3 plan and produce database reports in a variety of report formats</p> | |
| a | <p>plan and produce a report</p> <ul style="list-style-type: none"> • If candidates present the data in a format other than a report this is penalised as one accuracy error per report, however, any other objectives not evidenced as a result of the alternative format will incur additional penalties under the appropriate assessment objective(s). <p>Note: Failure to produce a specified report is penalised under 4a.</p> |
| b | <p>set page layout including page header/footer, automatic fields and orientation</p> <ul style="list-style-type: none"> • Failure to set page layout and orientation is penalised as one accuracy error per assignment • Failure to display headers/footers as specified is penalised as one accuracy error per assignment. <p>Note: If candidates use an incorrect layout and do not display a header/footer they will incur two accuracy errors.</p> <p>Note: Where a report header/footer is specified it is expected that this will be displayed on each page of the report, however, unless instructed otherwise, no penalty is incurred if the header/footer is displayed only at the top/bottom of the report.</p> |
| c | <p>format data in reports</p> <ul style="list-style-type: none"> • Failure to display data in reports as specified is penalised as one accuracy error per report. <p>Note: Truncated data in reports is penalised under 4a.</p> |
| d | <p>display data in group format and include group headers</p> <ul style="list-style-type: none"> • Failure to display data in group format as specified is penalised as a critical error • Failure to display group headers is penalised as a critical error. |
| e | <p>display report titles</p> <ul style="list-style-type: none"> • A missing report title or failure to display a report title as specified is penalised as one accuracy error per data item. |

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| f | <p>display summaries</p> <ul style="list-style-type: none"> • Failure to display a summary is penalised as a critical error • An incorrect summary is penalised as a critical error • A missing summary label or a summary label not displayed as specified is penalised as one accuracy error per data item <p>Note: Formatting of the summary is penalised under 3c. A truncated report summary and/or label is penalised under 4a, however, it must be evident from the printout that the report summary is correct (whole numbers must be shown in full). Superfluous (additional) use of text labels and/or summary information is not penalised. Unrequested additional summaries are not penalised (e.g. displaying grand totals in addition to subtotals).</p> |
| 4 print database reports | |
| a | <p>print report in specified format</p> <ul style="list-style-type: none"> • Any missing printout is penalised as a critical error • Failure to present the report fields in the order specified is penalised as one accuracy error per report • Truncated data is penalised as one accuracy error per data item • Failure to present the report in the specified format (e.g. table, tabular, label, columnar) is penalised as one accuracy error per report. <p>Note: If an identical word/item is truncated in several places, this will be penalised as one accuracy error only, regardless of how many times that item/word appears in a report.</p> <p>If the format of the field has not been set as specified (e.g. to 2 decimal places) this will show on the printed report and will be penalised under the second bullet point of 1c.</p> |
| b | <p>print reports to specified number of pages</p> <ul style="list-style-type: none"> • Failure to print report to the specified number of pages is penalised as one accuracy error per assignment. |

Marking Reference Grid for Unit 3: Creating and Using a Database

Data items:

- the contents of a field within a record (each cell)
- a field heading
- a report title
- a summary label
- a footer
- a filename
- a query name
- a report name
- a table name

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|--|----------------|---------------------------------|-------------------|----------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | set up field headings | | | | ✓ |
| 1b | set up data types for fields | | | ✓ (per field) | |
| 1c | format field properties * | ✓ | | ✓ (per field) | |
| 1d | enter records * | ✓ | | | ✓ |
| 1e | sort data in queries and reports* | ✓ | ✓ (ascending/ descending) | ✓ | |
| 1f | save data (table, query, report) with specified name * | | ✓ (incorrect name(s)) | ✓ | |
| 1g | print data | ✓ | | | |
| 2a | import generic datafile | | ✓ | | |
| 2b | modify field characteristics * | ✓ | | ✓ | ✓ |
| 2c | update existing database * | ✓ | | | ✓ |
| 2d | use logical and/or range operators in queries | ✓ | | | |
| 2e | use a calculated field * | ✓ | | | ✓ |
| 3a | plan and produce a report | | | ✓ (per report) | |
| 3b | set page layout including page header/footer, automatic fields and orientation * | | | ✓ | ✓ |
| 3c | format data in reports | | | ✓ (per report) | |
| 3d | display data in group format and include group headers | ✓ | | | |
| 3e | display report titles | | | | ✓ |
| 3f | display summaries * | ✓ | | | ✓ |
| 4a | print report in specified format * | ✓ | | | ✓ |
| 4b | print reports to specified number of pages | | ✓ | | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units. For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

UNIT 4: e-PUBLICATION DESIGN

Unit Description

This unit is designed to accredit vocational competencies in using desktop publishing software to create a publication. Candidates will develop proficiency in the software to be used, along with a sound understanding of page layout and the ability to respond to a design brief.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 31 Desktop Publishing Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced.

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 31. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – e-Publication Design | |
|--|--|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 set up master page/templates and documents using layout guides and design brief(s) | |
| | <ul style="list-style-type: none"> • understand what and how different IT activities are affected by laws and guidelines, such as storing names and addresses and downloading images from the Internet • understand how to produce information that communicates clearly and accurately with the audience, where and when it is needed |
| a use appropriate application software | <ul style="list-style-type: none"> • understand why and how the IT system and software used was appropriate for the task (e.g. dtp/page layout software) • understand correct procedures for using chosen software |
| b set document size c set margins d set and apply layout grids/guides according to a design brief e set up headers and footers f create columns g create text areas/text frames | <ul style="list-style-type: none"> • use common tools and techniques appropriately, such as page set-up, page size and orientation (including non standard page size), gridlines/layout guides, set margins (left, right, top, bottom), text frames/ areas, columns and space between columns, (gutter space), short-cuts and print preview e.g. in some software, the text frame properties must be set to zero to avoid additional space between columns. |
| h save master page/template | <ul style="list-style-type: none"> • use appropriate techniques to handle, organise and save files |
| i use template to create a variety of documents | <ul style="list-style-type: none"> • understand how to edit and use a template to create a variety of documents (for example, letterhead, business card, poster, newsletter) |
| j create a new page layout for a publication | <ul style="list-style-type: none"> • understand how to create a new page layout and when it would be appropriate to design a new page layout instead of an existing template |
| k print template/master pages | <ul style="list-style-type: none"> • understand how to print templates/master pages |
| 2 import and manipulate text and graphics | |
| a import text file(s) b import image file(s) | <ul style="list-style-type: none"> • know how to access files on a local area network (LAN) or a wide area network (WAN) |
| c place content according to text flow diagrams/design brief | <ul style="list-style-type: none"> • understand how to use a template to create a variety of documents • understand the use and purpose of design briefs and text flow diagrams |

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| d | apply styles to text | <ul style="list-style-type: none"> understand the use and importance of consistent formatting of text (type face, size, alignment, emphasis) and ensure headings, subheadings and body text are formatted appropriately |
| e | insert and format lines/boxes/arrows | <ul style="list-style-type: none"> understand how to use and format lines/boxes/arrows |
| f | layer graphics and text | <ul style="list-style-type: none"> understand how to combine information (for example, importing text, pictures, lines, boxes and arrows), in a publication placing them according to a design brief understand the use of layers in combining graphics and text |
| g | use special text effects | <ul style="list-style-type: none"> understand how to create special effects, for example, dropped/raised capitals, reverse text, rotated text, word art |
| h | group, copy, paste and move multiple items | <ul style="list-style-type: none"> understand how to group, copy and move multiple items, for example, a shaded box, text and a graphic |
| i | ungroup items | <ul style="list-style-type: none"> understand how to ungroup items |
| 3 amend publication content and use appropriate checking techniques | | |
| a | amend text according to proof correction symbols | <ul style="list-style-type: none"> understand the use of common proof correction symbols (stet, insert, new paragraph, transpose, delete, close up, capitalisation) |
| b | insert text | <ul style="list-style-type: none"> know how to insert text into a publication |
| c | copyfit publication and check publication(s) | <ul style="list-style-type: none"> understand and, where appropriate, apply copyfitting techniques including widows and orphans, consistent paragraph spacing, keep with next, overlapping page items, leading/line spacing, hyphenation, white space and column balancing use proof reading techniques to check that the publication looks professional use checking techniques to ensure graphics are displayed appropriately for example in proportion, text wrap applied |

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| 4 prepare publication for press | |
| a save documents and publication(s) | <ul style="list-style-type: none"> • appreciate what file formats are suitable for print publishing and those that are application specific and more common (e.g. rtf, eps, pdf) |
| b print colour-separated camera-ready copy | <ul style="list-style-type: none"> • appreciate the implications of commercial printing and the differences between composite and spot-colour process printing (cost, scale, colour accuracy) • appreciate the difference between RGB and CYMK modes of print • understand the use and purpose of colour separation |
| c set crop marks to print | <ul style="list-style-type: none"> • understand the use and purpose of crop marks |
| d print composite publication(s) | <ul style="list-style-type: none"> • understand how to print composite copies and when these might be used |

Marking Criteria for Unit 4: e-Publication Design

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- any missing image
- specified text file is missing or incomplete
- illegible fonts
- an incorrect imported image
- a missing printout (excluding screen prints)*

Accuracy errors are incurred for each instance of:

- an error in inputting data (see list of data items)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Data items for Unit 4, e-Publication Design are:

- a word
- headers/footers
- a filename

Additional, un-requested formatting is not penalised unless candidates are instructed otherwise (for example, if bold has been applied when the instruction for a style states 'normal' or 'italic only', this would incur an accuracy error).

Consistent use of case is not penalised if used appropriately (for example use of upper case for headings even if presented as sentence case in the assignment).

Lack of a capital at the start of a sentence and/or for proper nouns is penalised per data item.

Upper case letter(s) appearing in the middle or at the end of word(s) keyed in using lower case are penalised per data item.

Any other instance of inconsistent use of case is penalised as one accuracy error per assignment.

* Screen printouts are required to evidence certain objectives. Where a screen printout is an assessment objective this will be penalised as one accuracy error for the missing printout. Note, however, that if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout provides evidence. Where a screen printout is not an assessment objective candidates will only be penalised under the assessment objective(s) for which there is no evidence.

Detailed Marking Criteria for Unit 4: e-Publication Design

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 set up master page/templates and documents using layout guides and design brief(s) | |
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| a | <p>use appropriate application software</p> <ul style="list-style-type: none"> Failure to use appropriate application software will result in a penalty under each assessment objective that is not evidenced as a result of inappropriate software being used. |
| b | <p>set document size</p> <ul style="list-style-type: none"> Failure to set document size and orientation as specified is penalised as one accuracy error per assignment. <p>Note however, that candidates will also be penalised under each assessment objective not evidenced as a result of the document size/orientation not being set as specified (for example 4c set crop marks to print).</p> |
| c | <p>set margins</p> <p>Candidates should be aware that in some software the text frame properties must be set to zero to avoid additional margin space.</p> <ul style="list-style-type: none"> Failure to set margins as specified is penalised as one accuracy error per assignment. <p>There is a total tolerance of 6 mm for left/right margins and a total tolerance of 10 mm for top/bottom margins.</p> <p>Note: Page items that extend into any margin space (as set by the candidate) incur a penalty under this assessment objective. There is no tolerance for page items that extend beyond the margins set by the candidate.</p> |
| d | <p>set and apply layout grids/guides according to a design brief</p> <p>Any method of setting/applying layout grids/guides that enable the candidate to flow the text and layout page items as specified is acceptable. If the layout grids/guides prevent page items being displayed as shown in the design brief this will be penalised under the appropriate assessment objective(s).</p> |
| e | <p>set up headers and footers</p> <ul style="list-style-type: none"> Failure to set up headers and/or footers as specified is penalised as one accuracy error per assignment. |

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| f | <p>create columns</p> <p>Candidates should be aware that in some software the text frame properties must be set to zero to avoid additional space between columns.</p> <ul style="list-style-type: none"> • Failure to create the specified number of columns is penalised as one accuracy error per instruction. • Failure to set the space between columns as specified is penalised as one accuracy error per assignment. <p>Note: Page items that extend into the space between columns incur a penalty under this assessment objective. Where candidates are required to flow text across two or more columns, and fail to do so, this is penalised under assessment objective 2c.</p> <p>There is no tolerance on the measurement of space between columns. Deviation from this rule incurs one accuracy error per assignment.</p> |
| g | <p>create text areas/text frames</p> <p>Any facility of the chosen software that results in the flow of text as specified is acceptable.</p> <ul style="list-style-type: none"> • Failure to create text frames to enable the text flow to be as specified is penalised under assessment objective 2c. |
| h | <p>save master page/template</p> <p>Any method of saving a master page/template is acceptable. For example, if the system will not allow templates to be saved, the template may be saved as a publication (preferably read only). Candidates must, however, be aware that when creating a publication based on a template that the original template must remain in tact.</p> <ul style="list-style-type: none"> • Failure to save the master page/template is penalised as one accuracy error per assignment. • Failure to use the specified filename is penalised under 4a <p>Note: Failure to save the master page/template may also result in errors under assessment objective 1i.</p> <p>Unless an automatic filename is displayed on the printout, the local assessor should observe this objective. A note of any error(s) in saving and/or using the specified filename should be noted on the appropriate printout.</p> |
| i | <p>use template to create a variety of documents</p> <ul style="list-style-type: none"> • Failure to use the specified template to create a variety of documents is penalised as one accuracy error per document. |
| j | <p>create a new page layout for a publication</p> <ul style="list-style-type: none"> • Failure to create a new page layout is penalised as one accuracy error per publication. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objectives for any missing evidence as a result of an inappropriate master page template being used instead of a new page layout being created.</p> |

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| k | <p>print template/master pages</p> <p>This print must display only the template/master page items.</p> <ul style="list-style-type: none"> • Failure to print the template/master page is penalised as a critical error • Additional unrequested item(s) on the template/master page are penalised as one accuracy error per item. <p>Note: The addition of personal details, an automatic date and/or filename is not penalised even if not requested. Missing items on the template are penalised under the appropriate assessment objective.</p> |
| <p>2 import and manipulate text and graphics</p> | |
| a | <p>import text file(s)</p> <ul style="list-style-type: none"> • Failure to import all of the text in any specified text file is penalised as a critical error • Any unspecified amendments to the actual text in a text file are penalised as one accuracy error per data item. <p>Note: Failure to flow the text as specified is penalised under assessment objective 2c.</p> <p>If hyphenation in the text file is different from that shown in the draft document, no penalty will be incurred.</p> |
| b | <p>import image file(s)</p> <p>Images must be sized to suit the design brief. Unless specified, images do not have to span the width of the column.</p> <ul style="list-style-type: none"> • Failure to import any image or printing with any image missing is penalised as a critical error • Any unspecified amendment to image(s) (e.g. if the image is flipped, cropped, distorted/out of proportion) is penalised as one accuracy error per assignment • Inserting an incorrect image is a critical error as the candidate has not imported the specified image. <p>Note: Failure to position image(s) as specified is penalised under assessment objective 2c. Image(s) that extend into the margin and/or space between columns are penalised under 1c (margins) and/or 1f (space between columns).</p> |
| c | <p>place content according to text flow diagrams/design brief</p> <ul style="list-style-type: none"> • Failure to flow text as shown in the design brief is penalised as one accuracy error per design brief. • Failure to position page items (e.g. images, boxes, lines) as shown in the design brief is penalised as one accuracy error for each item not positioned as shown. <p>Note: Margins, and space between columns/gutter space, are not penalised under this assessment objective – see assessment objectives 1c and 1f.</p> |

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| d | <p>apply styles to text</p> <p>Centres should be aware that serif and sans serif refer to the font family and are not font names.</p> <ul style="list-style-type: none"> • Failure to apply any style as specified is penalised as one accuracy error per style • An inconsistent font for the same style is penalised as one accuracy error per style (e.g. the use of two different fonts from the same font family for body text) • Use of an illegible font(s) (e.g. Windings) is penalised as a critical error. |
| e | <p>insert and format lines/boxes/arrows</p> <ul style="list-style-type: none"> • Failure to insert any specified line/box/arrow penalised as one accuracy error per instruction • Failure to format lines/boxes/arrows as specified is penalised as one accuracy error per assignment. |
| f | <p>layer graphics and text</p> <ul style="list-style-type: none"> • Failure to layer graphics and text as specified penalised as one accuracy error per instruction. <p>Note: If page items are not displayed on the print as a result of incorrect layering this will be penalised under the appropriate assessment objective (e.g. a missing image will be penalised as a critical error under 2b).</p> |
| g | <p>use special text effects</p> <ul style="list-style-type: none"> • Failure to use special text effects as specified is penalised as one accuracy error per assignment. |
| h | <p>group, copy, paste and move multiple items</p> <p>In the copy of the grouped items, each item within the grouped items (unless specified for amendment or deletion) must be in the same relative position as they were in the original group.</p> <ul style="list-style-type: none"> • Failure to group, copy, paste and move items as specified is penalised as one accuracy error per assignment. |
| i | <p>ungroup items</p> <p>Unless otherwise instructed, ungrouped items must remain in the same relative position as they were in the original group.</p> <ul style="list-style-type: none"> • Failure to ungroup items, maintaining the relative position of each item within the group (unless otherwise specified) is penalised one accuracy error per assignment • Failure to delete/amend any ungrouped item as specified is penalised as one accuracy error per assignment (e.g. if an item is placed over the grouped item instead of ungrouping and amending). |

| 3 amend publication content and use appropriate checking techniques | |
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| a | <p>amend text according to proof correction symbols</p> <ul style="list-style-type: none"> • Failure to amend text according to proof correction symbols, maintaining consistent spacing between paragraphs and/or after punctuation, is penalised as one accuracy error per amendment. <p>* Please see examples of amendment and correction signs on page 68.</p> |
| b | <p>insert text</p> <ul style="list-style-type: none"> • Failure to insert text as specified is penalised as one accuracy error per data item. |
| c | <p>copyfit publication and check publication(s)</p> <ul style="list-style-type: none"> • Failure to copyfit the publication as specified is penalised as one accuracy error per assignment • Failure to check that all page items are displayed as specified and that text is displayed in full is penalised under the appropriate assessment objective(s) • Widows and orphans (one line of text separated from the rest of the text either at the top or bottom of the column) are penalised as one accuracy error per assignment. <p>Note: Where candidates are instructed to ensure there is no more than 10 mm of vertical space in the document this includes shaded and/or solid areas that are not broken by a line/image or text. Vertical space either side of a page item (e.g. an image that does not fill the width of the entire column) and/or horizontal space is not penalised.</p> <p>Copyfitting the publication includes ensuring that:</p> <ul style="list-style-type: none"> ○ the leading is adjusted so that there is no more than 10 mm of vertical space anywhere in the document, except where indicated in the Page Layout Sketch in the assignments (the top of column 1 on page 2) ○ columns are balanced to within 10 mm ○ leading is consistent ○ paragraph spacing is consistent ○ there are no hyphenated line endings (except for hyphenated words) ○ subheadings are kept with at least two lines of related text ○ there are no widows or orphans ○ all material is displayed as specified ○ the text file is displayed in full. |
| 4 prepare publication for press | |
| a | <p>save documents and publication(s)</p> <ul style="list-style-type: none"> • Failure to save any document/publication is penalised as one accuracy error on each occasion that the file is not saved. • Failure to use the specified filename(s) or an error in filename(s) is penalised as one accuracy error per assignment. <p>Unless an automatic filename is displayed on the printout, the local assessor should observe this objective. A note of any error(s) in saving and/or using the specified filename must be noted on the appropriate printout.</p> |

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| b | <p>print colour-separated camera-ready copy</p> <p>DUE TO CHANGES IN VOCATIONAL PRACTICE AND SOFTWARE THIS CRITERIA IS NO LONGER PENALISED – Candidates do still need to include printouts but do not need to evidence as colour-separated printouts.</p> |
| c | <p>set crop marks to print</p> <ul style="list-style-type: none"> • Failure to evidence crop marks on the print is penalised as one accuracy error per assignment. |
| d | <p>print composite publication(s)</p> <ul style="list-style-type: none"> • Any missing printout is penalised as a critical error. |

* 3a amend text according to proof correction symbols

AMENDMENT AND CORRECTION SIGNS FOR USE WITH UNIT 4 OF CLAiT PLUS

new paragraph [or // 

run on 

insertion / with word(s) above or balloon with arrow 

transpose horizontally  or 

or balloon with arrow 

transpose vertically 

close up 

leave a space /

move to the right 

move to the left 

stet - - - - - with  in margin

delete  through character

Set in capitals a

 no marginal instructions

Marking Reference Grid for Unit 4: e-Publication Design

Data items:

- a word
- headers/footers
- a filename

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|---|--|--|--------------------------------|-------------------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | use appropriate application software | Penalised under each assessment objective(s) not evidenced | | | |
| 1b | set document size | | ✓ | | |
| 1c | set margins | | ✓ | | |
| 1d | set and apply layout grids/guides according to a design brief | | Penalised under appropriate page layout objective(s) | | |
| 1e | set up headers and footers | | ✓ | | |
| 1f | create columns * | | ✓ | ✓ | |
| 1g | create text areas/text frames | Penalised under 2c | | | |
| 1h | save master page/template | | ✓ | | |
| 1i | use template to create a variety of documents | | | ✓ (per document) | |
| 1j | create a new page layout for a publication | | | ✓ (per document) | |
| 1k | print template/master pages* | ✓ | | | ✓ (additional items) |
| 2a | import text file(s) * | ✓ | | | |
| 2b | import image file(s) * | ✓ | ✓ | | |
| 2c | place content according to text flow diagrams/design brief * | | ✓ (per design brief for text) | ✓ (per item for page items) | |
| 2d | apply styles to text * | ✓ (if illegible) | | ✓ (per style) | |
| 2e | insert and format lines/boxes/arrows * | | ✓ (formatting) | ✓ | |
| 2f | layer graphics and text | | | ✓ | |
| 2g | use special text effects | | ✓ | | |
| 2h | group, copy, paste and move multiple items | | ✓ | | |
| 2i | ungroup items | | ✓ | | |
| 3a | amend text according to proof correction symbols | | | ✓ (per amendment) | |
| 3b | insert text | | | | ✓ |
| 3c | copyfit publication and check publication(s) | | ✓ | | |

| | | | | | |
|----|--|---|-----------------------|---|--|
| 4a | save documents and publication(s) * | | ✓ (incorrect name) | ✓ | |
| 4b | print colour-separated camera-ready copy * | ✓ | | ✓ (per item for missing/ additional page items) | |
| 4c | set crop marks to print | | ✓ | | |
| 4d | print composite publication(s) | ✓ | | | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

UNIT 5: DESIGN AN e-PRESENTATION

Unit Description

This unit is designed to accredit user competencies in using presentation graphics software and to use complex layouts and designs. Candidates will extend familiarity with the software to be used, along with a demonstrating a sound understanding of the use and manipulation of complex presentation techniques.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 59 Presentation Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. handout printouts, notes printouts, if submitting electronically a copy of the presentation file is not acceptable, a print to a pdf or similar file is acceptable.](#)

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 59. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – Design an e-Presentation | |
|---|---|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 set up master slide | |
| a use appropriate application software to import data into a presentation graphics software package from a given source | <ul style="list-style-type: none"> • understand how to open data from generic files and appreciate why it might be in that format • identify appropriate software to create a presentation • understand correct procedures for using the chosen software • understand how to produce information that communicates clearly and accurately with the audience, and appreciate where and when it will be needed • appreciate how to open presentations with and without the associated software |
| b create specified font styles | <ul style="list-style-type: none"> • understand the use and importance of style sheets for consistent formatting of text (typeface, size, enhancements, colours, alignment, bullets, promote/demote) |
| c apply a graphic as a background | <ul style="list-style-type: none"> • understand the use of master slides/templates • understand the need to produce an image as a consistent background to the presentation |
| d insert headers/footers | <ul style="list-style-type: none"> • understand the need to insert standard text, automatic fields (slide numbers, date, filename) to the slides for consistency |
| 2 create a presentation – inserting and manipulating data | |
| a import text | <ul style="list-style-type: none"> • understand how to import text files (select, cut, copy, move, delete, crop) into a presentation so they may be placed according to a design brief |
| b insert text | <ul style="list-style-type: none"> • appreciate the need for accuracy when inputting data and the importance of checking output against expectations (use of spell checking) |
| c edit text | <ul style="list-style-type: none"> • understand how to edit text using common editing tools (text selection, cut, copy & paste, delete & backspace) and appreciate the advantages/disadvantages of each method |
| d insert image/digital image e resize image f position image | <ul style="list-style-type: none"> • understand the use of graphics/digital images in a presentation • understand the use and importance of controlling the size of images maintaining the original proportions • understand the use of positioning an image to gain the greatest effect in a presentation |

| | | |
|---|---|--|
| g | embed a chart | <ul style="list-style-type: none"> understand how to embed charts and organisation charts |
| h | embed an organisation chart | |
| i | insert a table from a spreadsheet | <ul style="list-style-type: none"> understand the use of importing data from a spreadsheet and embedding into a presentation understand how to align data by use of tables and tabulations (right, left, centre, decimal) and how to apply gridlines and borders to tables/cells |
| j | find and replace data | <ul style="list-style-type: none"> understand how to edit text by using search and replace |
| k | add/delete slide | <ul style="list-style-type: none"> understand the use and purpose of adding and deleting slides when amending a presentation |
| l | delete text | <ul style="list-style-type: none"> understand how to delete text and bullet points |
| 3 control a presentation | | |
| a | use animation facilities | <ul style="list-style-type: none"> understand how to apply animation effects as the presentation builds on the slide |
| b | use transition facilities | <ul style="list-style-type: none"> understand how to apply transition effects as the presentation moves through the slides |
| c | apply timings | <ul style="list-style-type: none"> understand how to create different timings on slides |
| d | change order of slides | <ul style="list-style-type: none"> understand how to change the order of slides and the importance of changing the order |
| e | hide a slide | <ul style="list-style-type: none"> understand the need to hide slide(s) from some audiences to maintain confidentiality |
| f | create a hyperlink to access hidden slide | <ul style="list-style-type: none"> understand the use and purpose of links to access hidden slides |
| 4 save, print and produce support materials for a presentation | | |
| a | save the presentation | <ul style="list-style-type: none"> appreciate the use of save, save as and close |
| b | save presentation ready to view | |
| c | close presentation | <ul style="list-style-type: none"> understand the importance of saving presentations in a suitable format for viewing without the software or as an automatic show |
| d | set the page orientation | <ul style="list-style-type: none"> understand how to change page orientation for slides, handouts, speakers notes and outline view |
| e | print the presentation slide(s) | <ul style="list-style-type: none"> understand how to print from the chosen software using default print settings understand the need and how to print the presentation as individual slides understand the use and purpose of changing the default print settings |

| | | |
|---|--|---|
| f | print the presentation as handouts | <ul style="list-style-type: none"> • understand how to produce audience notes and thumbnail printouts |
| g | print the presentation as speakers notes | <ul style="list-style-type: none"> • understand the need to print the presentation for the speaker to use |
| h | <p>produce screen print(s) to evidence the following:</p> <ul style="list-style-type: none"> • animation • transitions • timings • order change • hidden slide • links | <ul style="list-style-type: none"> • understand the need to demonstrate that features that have been used on an electronic version need to be evidenced on hard copy |

Marking Criteria for Unit 5: Design an e-Presentation

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- any specified image is missing
- a missing slide
- failure to hide specified slide
- failure to delete specified slide
- failure to apply timings on specified slides
- a missing printout (excluding screen prints)*

Accuracy errors are incurred for each instance of:

- an error in inputting data (see list of data items)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Data items for Unit 5, Design an e-Presentation are:

- a title
- a subtitle
- a bullet point/a line of text
- an organisation chart
- a chart (graph)
- a table
- header and footer

Note: Some software used for this unit automatically resizes data on slides to fit the slide layout. This is not penalised, as long as it can be seen that the text sizes are 'proportionally' the same as those on the other slides.

Additional, un-requested formatting is not penalised unless candidates are instructed otherwise (for example, if bold has been applied when the instruction for a style states 'normal' or 'italic only', this would incur an accuracy error).

Unless instructed otherwise, consistent use of case is not penalised if used appropriately (for example, use of upper case (capital letters) for headings (even if presented as sentence case in the assignment)).

Lack of a capital for proper nouns is penalised per data item. Upper case letter(s) appearing in the middle or at the end of word(s) keyed in using lower or sentence case are penalised per data item.

Lack of a capital at the start of bullet point(s) and/or any instance of inconsistent use of case not listed above is penalised as one accuracy error per assignment.

* Screen printouts are required to evidence certain objectives. Where a screen printout is an assessment objective this will be penalised as one accuracy error for the missing printout. Note, however, that if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout(s) provides evidence. Where a screen printout is not an assessment objective candidates will only be penalised under the assessment objective(s) for which there is no evidence. **When providing evidence for animations, transitions, timings and saved files these must be clearly shown on the printout and the printout must be large enough to read.**

Detailed Marking Criteria for Unit 5: Design an e-Presentation

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| | |
|--|--|
| 1 set up master slide | |
| a | <p>use appropriate application software to import data into a presentation graphics software package from a given source</p> <ul style="list-style-type: none"> Failure to use appropriate application software will result in a penalty under each assessment objective that is not evidenced as a result of inappropriate software being used. |
| b | <p>create specified font styles</p> <ul style="list-style-type: none"> Failure to apply any style as specified is penalised as one accuracy error per style An inconsistent font and/or bullet character for the same style is penalised as one accuracy error per style (e.g. two different styles used for 1st level bullets) Inconsistency of font size, even if due to automatic software resizing, is penalised as one accuracy error per style. |
| c | <p>apply a graphic as a background</p> <p>Candidates will be expected to resize the graphic to fill the entire background of the slide. There is a tolerance of 10 mm on the fill of the background on each side (top, bottom, left and right). The graphic may overlap the edge of the slide by up to 10 mm on any/all sides and/or the graphic may be up to 10 mm short of filling the background on any/all sides. The original proportions must be maintained when the graphic is resized.</p> <ul style="list-style-type: none"> Failure to display a graphic as a background on any/all specified slide(s) or printing with the background missing is penalised as a critical error Failure to display the graphic as specified (e.g. if the graphic is distorted or is not positioned within the tolerance allowed) is penalised as one accuracy error per assignment. |
| d | <p>insert headers/footers</p> <p>Any font style may be used for headers and footers.</p> <ul style="list-style-type: none"> Failure to set up headers and/or footers as specified is penalised as one accuracy error per assignment. |
| 2 create a presentation – inserting and manipulating data | |
| a | <p>import text</p> <ul style="list-style-type: none"> Any missing slide as a result of failing to import the text is penalised as a critical error Any missing text and/or any text imported onto the wrong slide is penalised as an accuracy error per data item. |
| b | <p>insert text</p> <ul style="list-style-type: none"> Failure to insert text as specified is penalised as one accuracy error per data item Failure to apply the correct style to the inserted text is penalised as one accuracy error per assignment. |

| | |
|---|---|
| c | <p>edit text</p> <ul style="list-style-type: none"> Failure to edit text as specified, or editing more than the specified text, is penalised as one accuracy error per data item. |
| d | <p>insert image/digital image</p> <ul style="list-style-type: none"> Failure to display the image on the slide(s) specified or printing with the image missing on any/all specified slides is penalised as a critical error Failure to display the image as specified (e.g. if the image is flipped/cropped/rotated) is penalised as one accuracy error per assignment. <p>Note: Out of proportion image(s) are penalised under 2e, image(s) inserted in an incorrect position are penalised under 2f.</p> |
| e | <p>resize image</p> <ul style="list-style-type: none"> Failure to resize the image is penalised as one accuracy error per assignment. Failure to maintain the proportions of the image when resizing is penalised as one accuracy error per assignment. |
| f | <p>position image</p> <ul style="list-style-type: none"> Failure to position the image as specified is penalised as one accuracy error per assignment. <p>Note: The image must be on the correct slide or this will be penalised under 2d.</p> |
| g | <p>embed a chart</p> <ul style="list-style-type: none"> Failure to attempt to embed a chart that results in a missing slide is penalised as a critical error Errors in the chart and/or failure to display the chart as specified is penalised as one accuracy error per assignment. |
| h | <p>embed an organisation chart</p> <ul style="list-style-type: none"> Failure to attempt to embed an organisation chart that results in a missing slide is penalised as a critical error Errors in the organisation chart and/or failure to display the organisation chart as specified is penalised as one accuracy error per assignment. |
| i | <p>insert a table from a spreadsheet</p> <ul style="list-style-type: none"> Failure to attempt to insert a spreadsheet that results in a missing slide is penalised as a critical error Errors in the spreadsheet and/or failure to display the spreadsheet as specified is penalised as one accuracy error per assignment. |
| j | <p>find and replace data</p> <ul style="list-style-type: none"> Failure to replace the specified data as specified or error(s) in the replaced data is penalised as one accuracy error per assignment. <p>Additional unrequested replacements are penalised as an accuracy error per data item.</p> |

| | |
|--|---|
| k | <p>add/delete slide</p> <ul style="list-style-type: none"> • Failure to add and/or delete the specified slide(s) is penalised as a critical error • Inserting the slide in an incorrect position is penalised as one accuracy error per assignment • Deleting an additional slide is penalised as a critical error • Adding more than the requested slide(s) is penalised as one accuracy error per slide. |
| l | <p>delete text</p> <ul style="list-style-type: none"> • Failure to delete any/all of the specified text is penalised as one accuracy error per data item • Deleting more than the specified text is penalised as one accuracy error per data item • Errors in the text levels or layout as a result of the deletion are penalised as one accuracy error per assignment. <p>Note: If deleting more than the specified text results in missing evidence for any other assessment objective, the candidate will also incur the appropriate penalty under the assessment objective for which there is no evidence.</p> |
| <p>3 control a presentation</p> | |
| a | <p>use animation facilities</p> <ul style="list-style-type: none"> • Failure to use and/or provide evidence of animation facilities (builds) are penalised as one accuracy error per assignment. • When providing evidence for animations, these must be clearly shown on the printout and the printout must be large enough to read. |
| b | <p>use transition facilities</p> <ul style="list-style-type: none"> • Failure to use and/or provide evidence of transition facilities are penalised as one accuracy error per assignment. • When providing evidence for transitions, these must be clearly shown on the printout and the printout must be large enough to read. |
| c | <p>apply timings</p> <p>There must be clear evidence of the timings applied to each specified slide.</p> <ul style="list-style-type: none"> • Failure to evidence timings on any/all specified slides is penalised as a critical error • Incorrect timings on any/all slides is penalised as one accuracy error per assignment. • When providing evidence for timings, these must be clearly shown on the printout and the printout must be large enough to read. |
| d | <p>change order of slides</p> <ul style="list-style-type: none"> • Failure to change the order of slides is penalised as one accuracy error per assignment • Unrequested changes to the order of slides is penalised as one accuracy error per assignment. • When providing evidence, these must be clearly shown on the printout and the printout must be large enough to read. |
| e | <p>hide a slide</p> <ul style="list-style-type: none"> • Failure to hide the specified slide is penalised as a critical error • Hiding additional slide(s) is penalised as a critical error. • When providing evidence, these must be clearly shown on the printout and the printout must be large enough to read. |

| | |
|--|---|
| f | <p>create a hyperlink to access hidden slide</p> <ul style="list-style-type: none"> • Failure to create a hyperlink to access the hidden slide as specified, or to provide printed evidence of the hyperlink, is penalised as one accuracy error per assignment • Candidates will incur one accuracy error where the hyperlink has been applied to text rather than a button, or vice-versa, as specified in the assignment. <p>Where it is not evident from the printed copy that the link has been applied to the correct slide this should be observed by the centre assessor who must note any errors in the link on the printout. When providing evidence for the hyperlink, these must be clearly shown on the printout and the printout must be large enough to read.</p> |
| <p>4 save, print and produce support materials for a presentation</p> | |
| a | <p>save the presentation</p> <ul style="list-style-type: none"> • Failure to save the presentation is penalised as one accuracy error on each occasion that the presentation is not saved • Failure to use the specified filename is penalised as one accuracy error per assignment. <p>Unless an automatic filename is displayed on the printout, the local assessor should observe this objective. A note of any error(s) in saving and/or using the specified filename should be noted on the appropriate printout.</p> |
| b | <p>save presentation ready to view</p> <p>Any method of saving that enables the presentation to be viewed without loading the associated software is acceptable (e.g. html format, 'Pack and Go', independent slide show).</p> <ul style="list-style-type: none"> • Failure to save the presentation ready to view and/or to provide evidence that the presentation has been saved in this format is penalised as one accuracy error per assignment • Failure to use the specified filename is penalised as one accuracy error per assignment. <p>Note: The screen print, to evidence that the slide show has been saved as a presentation ready to view, MUST be taken after the file has been saved NOT during the saving process. When providing evidence for saved files, these must be clearly shown on the printout and the printout must be large enough to read.</p> |
| c | <p>close presentation</p> <ul style="list-style-type: none"> • Failure to close the presentation is penalised as one accuracy error per assignment. <p>The local assessor should observe this objective. If the presentation has not been closed this should be noted on the final printout.</p> |
| d | <p>set the page orientation</p> <ul style="list-style-type: none"> • Failure to set the page (slide) orientation as specified is penalised as one accuracy error per assignment. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of the orientation not being set as specified.</p> |

| | |
|---|---|
| e | <p>print the presentation slide(s)</p> <ul style="list-style-type: none"> • Failure to print the presentation is penalised as a critical error • Failure to print the presentation in the specified layout is penalised as one accuracy error per printout. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of the specified print layout not being used. If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file.</p> |
| f | <p>print the presentation as handouts</p> <ul style="list-style-type: none"> • Failure to print the presentation as handouts is penalised as a critical error • Failure to print the presentation handouts in the specified layout is penalised as one accuracy error per printout. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of the specified print layout not being used. If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. handout printout, if submitting electronically a copy of the presentation file is not acceptable, a print to a pdf or similar file is acceptable.</p> |
| g | <p>print the presentation as speakers' notes</p> <ul style="list-style-type: none"> • Failure to print the presentation as speakers' notes is penalised as a critical error. • Failure to print the speakers' notes as specified is penalised as one accuracy error per printout. <p>The medium font size used for the speaker notes need not be the same medium font size that is used for the slides.</p> <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of the specified print layout not being used. If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. notes printout, if submitting electronically a copy of the presentation file is not acceptable, a print to a pdf or similar file is acceptable.</p> |
| h | <p>produce screen print(s) to evidence the following:</p> <ul style="list-style-type: none"> ○ animation ○ transitions ○ timings ○ order change ○ hidden slide ○ links. <p>Candidates will be required to take a number of screen prints during the assessment. Candidates may print these as individual documents or alternatively all screen prints may be contained in one document, which may be printed at the end of the assignment. If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.</p> <p>The required evidence must be clearly visible on the screen print.</p> <ul style="list-style-type: none"> • Failure to produce screen print(s) is penalised as one accuracy error per assignment, however, if the required evidence is not provided in an alternative format candidates will also incur the appropriate penalty under each of the assessment objective(s) not evidenced. |

Marking Reference Grid for Unit 5: Design an e-Presentation

Data items:

- a title
- a subtitle
- a bullet point/a line of text
- an organisation chart
- a chart (graph)
- a table
- header and footer

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|---|--|---------------------------|---|----------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | use appropriate application software to import data into a presentation graphics software package from a given source | Penalised under each assessment objective(s) not evidenced | | | |
| 1b | create specified font styles | | | ✓ (per style) | |
| 1c | apply a graphic as a background * | ✓ | ✓ | | |
| 1d | insert headers/footers | | ✓ | | |
| 2a | import text * | ✓ | | | ✓ |
| 2b | insert text * | | ✓ | | ✓ |
| 2c | edit text | | | | ✓ |
| 2d | insert image/digital image * | ✓ | ✓ | | |
| 2e | resize image | | ✓ | | |
| 2f | position image | | ✓ | | |
| 2g | embed a chart * | ✓ | ✓ | | |
| 2h | embed an organisation chart * | ✓ | ✓ | | |
| 2i | insert a table from a spreadsheet * | ✓ | ✓ | | |
| 2j | find and replace data * | | ✓ | | ✓ |
| 2k | add/delete slide * | ✓ | ✓ (incorrect position) | ✓ (per slide for additional slides) | |
| 2l | delete text * | | ✓ | ✓ (incorrect layout or remaining text) | ✓ |
| 3a | use animation facilities | | ✓ | | |
| 3b | use transition facilities | | ✓ | | |
| 3c | apply timings * | ✓ (if missing) | ✓ (if incorrect) | | |
| 3d | change order of slides | | ✓ | | |
| 3e | hide a slide | ✓ | | | |
| 3f | create a hyperlink to access hidden slide | | ✓ | | |
| 4a | save the presentation * | | ✓ (incorrect name) | ✓ | |
| 4b | save presentation ready to view | | ✓ | | |
| 4c | close presentation | | ✓ | | |

| | | | | | |
|----|--|---|---|-------------------------|--|
| 4d | set the page orientation | | ✓ | | |
| 4e | print the presentation slide(s) * | ✓ | | ✓ (incorrect layout) | |
| 4f | print the presentation as handouts * | ✓ | | ✓ (incorrect layout) | |
| 4g | print the presentation as speakers notes * | ✓ | | ✓ | |
| 4h | produce screen print(s) to evidence the following: * <ul style="list-style-type: none"> ○ animation ○ transitions ○ timings ○ order change ○ hidden slide ○ links | ✓ | | ✓ | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

UNIT 6: e-IMAGE MANIPULATION

Unit Description

This unit is designed to accredit vocational competencies in using graphic editing and design software to create artwork for a variety of purposes, including printed and electronic media. Candidates will develop proficiency in the software to be used, along with a sound understanding of editing concepts, common software tools, and the requirements of the destination media. A colour printer will be required.

Candidates require access to a colour printer to complete this unit.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 37 Imaging Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically where the criteria require evidence of a printed file, not just the file. E.g. print to a pdf or similar file is acceptable.](#)

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 37. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

Note: All artwork printouts and printouts/screen print(s) of the animation frames MUST be printed in colour.

| Unit Content – e-Image Manipulation | |
|---|--|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 create artwork incorporating text and images in layers | |
| a use appropriate application software | <ul style="list-style-type: none"> • understand what and how different IT activities are affected by laws and guidelines, such as storing downloading images from the Internet • understand how to produce information that communicates clearly and accurately with the audience, and appreciate where and when it is needed • choose and use the most suitable software to create artwork for print • understand why and how the IT system and software used was appropriate for the task (e.g. animation and/or artwork) • understand correct procedures for using chosen software • choose and use common tools and techniques appropriately, such filters to create special effects, drop shadow, canvas size, colour mode and file size and format • use appropriate techniques to handle, organise and save files • know how to access files on a local area network (LAN) or a wide area network (WAN) |
| b set artwork size and resolution | <ul style="list-style-type: none"> • understand how to create artwork of a specific size and resolution and appreciate the effects of resolution on printed outcome and the relationship with print size and file size |
| c combine text and images according to a design brief | <ul style="list-style-type: none"> • understand how to combine text and images • understand the purpose of and how to follow a design brief |
| d layer items | <ul style="list-style-type: none"> • understand the use of layers in producing artwork |
| e insert text | <ul style="list-style-type: none"> • understand how to insert text into artwork |
| 2 edit and retouch scanned images | |
| a remove dust and/or scratches b remove unwanted content | <ul style="list-style-type: none"> • understand how to use graphic techniques to remove dust and scratches from an image, and remove/replace unwanted image content • understand the use of common paint tools (paintbrush, aerosol, eraser, clone brush, paint bucket) and selection tools (lasso, marquee, magic brush) |
| c apply colour correction/amendments | <ul style="list-style-type: none"> • understand how to alter colour values (hue, saturation, lightness) |

| | |
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| 3 use a variety of graphic effects | |
| a draw complex shapes | <ul style="list-style-type: none"> understand how to draw a variety of more complicated shapes e.g. oval, curved lines, freehand shapes |
| b use solid/gradient/pattern fills | <ul style="list-style-type: none"> understand how to fill background and/or selected areas with gradient, pattern or solid colour |
| c use filters to create special effects | <ul style="list-style-type: none"> understand how to apply filters to create special effects |
| d apply drop shadow | <ul style="list-style-type: none"> understand how to apply drop shadow |
| e format text colour and/or shape | <ul style="list-style-type: none"> understand how to format text colour and shape |
| f set opacity/transparency | <ul style="list-style-type: none"> understand how to adjust the opacity/transparency of a layer to create different effects (e.g. % opacity/transparency, multiply, darken, lighten) |
| 4 create animated image for electronic media | |
| a create new animation | <ul style="list-style-type: none"> choose and use the most suitable software to create artwork for display on screen or on a web page |
| b set animation size | <ul style="list-style-type: none"> understand how to create an animation of a specified size and resolution and appreciate why the resolution would be suitable for display on screen or on a web |
| c create individual frames using text/images/graphic shapes/fill | <ul style="list-style-type: none"> understand how to use common drawing/painting tools to produce simple frames/cells of graphics and text understand how to produce subsequent frames of animation in chosen software (e.g. individually or by automatic process) |
| d set duration of frames | <ul style="list-style-type: none"> understand how to set the duration of frames in an animation |

| 5 prepare artwork for print/electronic publishing | |
|--|--|
| a | <p>save artwork/animation in appropriate format</p> <ul style="list-style-type: none"> • appreciate common file formats for print/electronic artwork (e.g. jpeg, eps, bmp, tiff, gif) and understand how to produce them in chosen software • understand how to check artwork to ensure colour mode and filters are used appropriately and that artwork looks professional • understand how to check that image resolution is suitable for where and how artwork/animation will be used |
| b | <p>display crop marks</p> <ul style="list-style-type: none"> • understand the use and purpose of crop marks and how to display them |
| c | <p>print full colour proof(s)</p> <ul style="list-style-type: none"> • understand the use and purpose of full colour proofs |
| d | <p>produce full colour screen print(s)</p> <ul style="list-style-type: none"> • understand the use and purpose of screen prints |

Marking Criteria for Unit 6: e-Image Manipulation

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- any specified image is missing
- any block text missing in its entirety
- a missing frame in an animation
- a missing frame duration
- failure to save animation in an appropriate format
- failure to print full colour proofs
- a missing printout *

Accuracy errors are incurred for each instance of:

- an error in inputting data (see list of data items)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Data items for Unit 6, e-Image Manipulation are:

- a block of text
- an image

Consistent use of case is not penalised if used appropriately (for example use of upper case for text even if presented as sentence case in the assignment).

Lack of a capital at the start of a block of text (unless presented in lower case in assignment) and/or for proper nouns is penalised per data item. Upper case letter(s) appearing in the middle or at the end of word(s) keyed in using lower case are penalised per data item. Any other instance of inconsistent use of case is penalised as one accuracy error per assignment.

* Screen printouts are required to evidence certain objectives. In this unit some screen prints **MUST** be in colour to evidence certain assessment objectives. Where a screen printout is an assessment objective this will be penalised as one accuracy error for the missing printout. Note, however, that if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout provides evidence.

Where a screen printout is not an assessment objective candidates will only be penalised under the assessment objective(s) for which there is no evidence.

If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.

Versions and software – Any software that enables the candidate to meet the assessment objectives of this unit may be used. Candidates may use one software package to complete the artwork and different software to complete the animation.

Detailed Marking Criteria for Unit 6: e-Image Manipulation

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 create artwork incorporating text and images in layers | |
|--|---|
| a | <p>use appropriate application software</p> <ul style="list-style-type: none"> Failure to use appropriate application software will result in a penalty under each assessment objective that is not evidenced as a result of inappropriate software being used. |
| b | <p>set artwork size and resolution</p> <p>In some software a cm measurement will be automatically adjusted to the nearest millimetre measurement for the number of pixels displayed. This is not penalised. No other tolerance is given on the size and resolution.</p> <ul style="list-style-type: none"> Failure to set the artwork size and/or resolution as specified is penalised as one accuracy error per assignment. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of incorrect artwork/size resolution being set.</p> |
| c | <p>combine text and images according to a design brief</p> <p>Unless otherwise specified, text and images should have a transparent background.</p> <ul style="list-style-type: none"> A missing image is penalised as a critical error A distorted image and/or failure to display the image as specified is penalised as one accuracy error per image. Failure to position the text as specified is penalised as one accuracy error per instruction. (Errors in entering text are penalised under assessment objective 1e) Failure to display image(s) and/or text with a transparent background is penalised as one accuracy error per assignment Additional unrequested page items (e.g. text/images/graphic shapes/borders) are penalised as one accuracy error per page item. <p>Note: The design sketch is given as a guide and will show only the relative positions of the page items. It is expected that text/images may take more or less space than is shown in this sketch depending of the fonts/effects used.</p> |
| d | <p>layer items</p> <ul style="list-style-type: none"> Failure to use layers as specified is penalised as one accuracy error per assignment. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of failing to use layers, or arranging layers inappropriately.</p> |

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| e | <p>insert text</p> <p>A block of text refers to text entered on the same layer.</p> <ul style="list-style-type: none"> • A missing block of text is penalised as a critical error • Errors in entering text are penalised as an accuracy error per data item • Unrequested border(s) around text are penalised as one accuracy error per assignment. |
| 2 edit and retouch scanned images | |
| a | <p>remove dust and/or scratches</p> <ul style="list-style-type: none"> • Failure to remove dust and/or scratches as specified is penalised as one accuracy error per assignment • Failure to replace the area where dust/scratches have been removed with a background to match is penalised as one accuracy error per assignment. |
| b | <p>remove unwanted content</p> <ul style="list-style-type: none"> • Failure to remove unwanted content as specified is penalised as one accuracy error per instruction • Failure to replace the area, where content has been removed, with a background to match is penalised as one accuracy error per instruction. |
| c | <p>apply colour correction/amendments</p> <ul style="list-style-type: none"> • Failure to apply colour correction/amendments as specified is penalised as one accuracy error per instruction. |
| 3 use a variety of graphic effects | |
| a | <p>draw complex shapes</p> <ul style="list-style-type: none"> • Failure to draw and/or position complex shapes as specified is penalised as one accuracy error per assignment. <p>Note: Fine precision in the drawing of complex shapes is not required (for example a heart shape need not be symmetrical as long as the shape is recognisable).</p> |
| b | <p>use solid/gradient/pattern fills</p> <ul style="list-style-type: none"> • Failure to use solid/gradient/pattern fills as specified is penalised as one accuracy error per instruction. |
| c | <p>use filters to create special effects</p> <p>There must be a noticeable difference in the before and after print of the special effect.</p> <ul style="list-style-type: none"> • Failure to use filters to create special effects as specified is penalised as one accuracy error per assignment. |
| d | <p>apply drop shadow</p> <ul style="list-style-type: none"> • Failure to apply drop shadow as specified is penalised as one accuracy error per assignment. |
| e | <p>format text colour and/or shape</p> <ul style="list-style-type: none"> • Failure to format text colour and/or shape as specified is penalised as one accuracy error per instruction. |

| | |
|---|---|
| f | <p>set opacity/transparency</p> <ul style="list-style-type: none"> Failure to set opacity/transparency as specified is penalised as one accuracy error per instruction. |
| 4 create animated image for electronic media | |
| a | <p>create new animation</p> <ul style="list-style-type: none"> Failure to create a new animation (e.g. adapting an existing animation) is penalised as one accuracy error per assignment. <p>The local assessor should observe this objective and must note on the print if a new animation has not been created.</p> |
| b | <p>set animation size</p> <p>There is no tolerance on the animation size.</p> <ul style="list-style-type: none"> Failure to set the animation size as specified is penalised as one accuracy error per assignment. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of incorrect animation size being set.</p> |
| c | <p>create individual frames using text/images/graphic shapes/fill</p> <ul style="list-style-type: none"> Failure to create each individual frame as specified is penalised as one accuracy error per frame A missing image is penalised as a critical error Errors in text are penalised under assessment objective 1e Errors in formatting text colour and or shape are penalised under assessment objective 3e Errors in graphic shapes are penalised under assessment objective 3a Errors in fill are penalised under assessment objective 3b. |
| d | <p>set duration of frames</p> <ul style="list-style-type: none"> Any missing frame duration is penalised as a critical error Failure to set frame durations as specified are penalised as one accuracy error per assignment. <p>Note: Frame durations must be clearly displayed on the printout. If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.</p> |

| 5 prepare artwork for print/electronic publishing | |
|--|--|
| a | <p>save artwork/animation in appropriate format</p> <ul style="list-style-type: none"> • Failure to save the animation in an appropriate format is penalised as a critical error • Failure to save the artwork is penalised as one accuracy error on each occasion that the artwork is not saved • Failure to use the specified filename is penalised as one accuracy error per assignment. <p>Note: The name and file type of the animation must be evidenced on at least one printout of the animation. The local assessor should observe the saving of the artwork. A note of any error(s) in saving and/or using the specified filename should be noted on the appropriate printout.</p> <p>A screen print must be submitted to evidence that the animation has been saved in the appropriate format, clearly showing the name and file type of the animation. <i>If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.</i></p> |
| b | <p>display crop marks</p> <ul style="list-style-type: none"> • Failure to display crop marks is penalised as one accuracy error per assignment. |
| c | <p>print full colour proof(s)</p> <ul style="list-style-type: none"> • Failure to print full colour proof(s) is penalised as a critical error. <p>Centres must ensure that the quality of the print is sufficient to enable each assessment objective to be evidenced.</p> |
| d | <p>produce full colour screen print(s)</p> <p>Candidates will be required to take a number of screen prints during the assessment. Candidates may print these as individual documents or alternatively all screen prints may be contained in one document, which may be printed at the end of the assessment.</p> <p>The required evidence must be clearly visible on the screen printout.</p> <ul style="list-style-type: none"> • Failure to produce full colour screen print(s) is penalised as one accuracy error per assignment, however, if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout provides evidence. <p>Note: In some instances a black and white screen print will suffice (for example, to evidence the size/resolution of the artwork/animation) in these instances this will be clearly indicated in the assignment. In all other instances screen prints must be in full colour.</p> <p><i>If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.</i></p> |

Marking Reference Grid for Unit 6: e-Image Manipulation

Data items:

- a block of text
- an image

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|--|--|---------------------------|------------------|----------------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | use appropriate application software | Penalised under each assessment objective(s) not evidenced | | | |
| 1b | set artwork size and resolution | | ✓ | | |
| 1c | combine text and images according to a design brief * | ✓ | ✓ | ✓ | ✓ (per page item) |
| 1d | layer items | | ✓ | | |
| 1e | insert text * | ✓ | ✓ | | ✓ |
| 2a | remove dust and/or scratches | | ✓ | | |
| 2b | remove unwanted content | | | ✓ | |
| 2c | apply colour correction/amendments | | | ✓ | |
| 3a | draw complex shapes | | ✓ | | |
| 3b | use solid/gradient/pattern fills | | | ✓ | |
| 3c | use filters to create special effects | | ✓ | | |
| 3d | apply drop shadow | | ✓ | | |
| 3e | format text colour and/or shape | | | ✓ | |
| 3f | set opacity/transparency | | | ✓ | |
| 4a | create new animation | | ✓ | | |
| 4b | set animation size | | ✓ | | |
| 4c | create individual frames using text/images/graphic shapes/fill * | ✓ | | ✓ | ✓ (per frame) |
| 4d | set duration of frames * | ✓ | ✓ | | |
| 5a | save artwork/animation in appropriate format * | ✓ | ✓ (incorrect filename) | ✓ | |
| 5b | display crop marks | | ✓ | | |
| 5c | print full colour proof(s) | ✓ | | | |
| 5d | produce full colour screen print(s) | | ✓ | | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

UNIT 7: WEBSITE CREATION

Unit Description

This unit is designed to accredit user competencies in using software to select, present, manipulate and amend data and publish the website on the Internet. Candidates will develop proficiency in the software to be used, along with a sound understanding of common HTML concepts and features, web page formatting and web site structure. A familiarity with raw HTML code would be advantageous, but is not required.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 81 Website Software.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.](#)

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 81. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – Website Creation | |
|--|--|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 | create web pages from unformatted source material |
| a | use appropriate application software to create a website |
| b | download files |
| c | create/name folder(s) |
| d | create and define web pages |
| e | use meta tags and titles to describe page content |
| f | format text, links and background using body tag |
| g | create standard content |

| | |
|---|--|
| <p>h use appropriate techniques to handle and organise files and web pages</p> | <ul style="list-style-type: none"> • understand why download speed varies, such as by the type of browser and connection and by the memory size of the contents of the web page • appreciate what and how different IT activities are affected by laws and guidelines, such as storing names and address, downloading images from the Internet or sending inappropriate e-mails • understand what difficulties users with different needs may have in accessing websites • understand how to save web pages (.htm, .html) and the importance of retaining original filenames |
| <p>2 use and format images, text and tables</p> | |
| <p>a insert text and images</p> | <ul style="list-style-type: none"> • understand the need to ensure correct text is displayed on website • identify common file formats used for source text and images (.txt, .gif, .jpg) |
| <p>b proof read to check that text looks professional, using spell and grammar checkers</p> | <ul style="list-style-type: none"> • appreciate the need to use spellchecking facilities to check the accuracy of the text • appreciate the need to check grammar |
| <p>c set image resolution d set image attributes e rotate/flip image f resize image</p> | <ul style="list-style-type: none"> • appreciate the advantages of high-resolution and low-resolution alternates for large images • appreciate the need to set resolution of images and the effect on web page download times • understand the use and effect of image attributes (border, alt, height, width, align) |
| <p>g create and apply style sheets (css) h ensure line, paragraph and page breaks fall in appropriate places i set line spacing</p> | <ul style="list-style-type: none"> • understand the use and importance of style sheets (cascading style sheets) for consistent formatting of text (typeface, size, alignment, enhancement, alignment, bullet, promote/demote, colours) • understand the following range of text formatting: alignment (left, right, centre), emphasis (bold, italic), lists (ordered, unordered), font size (absolute and relative, e.g. size=3 and size=+2), font face (serif/sans-serif), font colour (named and hexadecimal) |
| <p>j insert table to align page content k insert a table from a spreadsheet</p> | <ul style="list-style-type: none"> • understand how to create simple tables • understand the process of inserting a document from different software |
| <p>l set table/cell alignment m set table dimensions</p> | <ul style="list-style-type: none"> • understand how to set the dimensions (table and column widths, absolute and relative) and alignment (horizontal and vertical) of a table and of its cells |

| | |
|---|--|
| 3 create and format an interactive form | |
| a set method and action | <ul style="list-style-type: none"> understand the use of the FORM tag and how to set the METHOD and ACTION |
| b use common input types | <ul style="list-style-type: none"> understand how to create basic form elements (radio buttons, checkboxes, text fields, submit and reset buttons) |
| c set input attributes | <ul style="list-style-type: none"> understand how to set basic form elements their various attributes, e.g. name and value |
| d test form | <ul style="list-style-type: none"> understand the need and purpose of testing that the form works prior to putting into use |
| 4 create links/hyperlinks | |
| a use images and text as anchors for hyperlinks | <ul style="list-style-type: none"> understand the use of named anchors within a page as a navigation tool |
| b use hyperlinks to external site | <ul style="list-style-type: none"> understand the use of different types of hyperlinks (external, e-mail, local) |
| c use hyperlinks to internal pages | <ul style="list-style-type: none"> understand the use of hyperlinks to move from one web page to another with the website |
| d use e-mail link | <ul style="list-style-type: none"> understand the use of http:// and mailto: when creating an e-mail link |
| e create relative links | <ul style="list-style-type: none"> understand the difference between relative and absolute links and appreciate the importance of relative links when publishing a web site on the Internet |
| f test the links | <ul style="list-style-type: none"> appreciate the need to test links and the advantages of a site map in constructing a web site |
| 5 save and upload the website | |
| a upload website to browser | <ul style="list-style-type: none"> appreciate the need to upload/publish web pages using a file exchange program such as FTP or HTTP |
| b test the site is operational | |
| c save the website | <ul style="list-style-type: none"> appreciate the use of save, save as and close |
| d close website | |

Marking Criteria for Unit 7: Website Creation

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- any specified image is missing
- any specified text file is missing
- a missing or inoperative link
- an inoperative form (incorrect or missing: method/action/hidden field/reset button/submit button)
- a missing html file
- failure to save the website

Accuracy errors are incurred for each instance of:

- an error in inputting data (see list of data items)
- an error in completing any other assessment objective as specified that is not listed as a critical error

Data items for Unit 7, Website Creation are:

- a title and META tags
- a line/item of keyed in text
- a drop down list
- a form field
- a word in imported text
- a filename

Additional, un-requested formatting is not penalised unless candidates are instructed otherwise (for example, if bold has been applied when the instruction for a style states 'normal' or 'italic only', this would incur an accuracy error).

With the exception of hidden fields that are case sensitive, and would result in a **critical error** (e.g. Recipient for recipient), consistent use of case is not penalised if used appropriately (for example, use of upper case for headings even if presented as sentence case in the assignment).

Lack of a capital at the start of a sentence and/or for proper nouns is penalised per data item. Any other instance of inconsistent use of case is penalised as one accuracy error per assignment. Missing spaces in hidden fields that do not affect the functionality of the website are not penalised.

* Screen printouts are required to evidence certain objectives. Where a screen printout is an assessment objective this will be penalised as 1 accuracy error for the missing printout. Note however, that if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout provides evidence. Where a screen printout is not an assessment objective candidates will only be penalised under the assessment objective(s) for which there is no evidence.

If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.

Detailed Marking Criteria for Unit 7: Website Creation

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 create web pages from unformatted source material | |
|--|---|
| a | <p>use appropriate application software to create a website</p> <ul style="list-style-type: none"> • Failure to use appropriate application software will result in a penalty under each assessment objective that is not evidenced as a result of inappropriate software being used. |
| b | <p>download files</p> <ul style="list-style-type: none"> • Failure to download files as specified is penalised as one accuracy error per assignment. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of files not being downloaded.</p> |
| c | <p>create/name folder(s)</p> <ul style="list-style-type: none"> • Failure to create the specified folder(s) is penalised as one accuracy error for each folder • Failure to use the specified folder name(s) is penalised as one accuracy error per assignment. |
| d | <p>create and define web pages</p> <ul style="list-style-type: none"> • Any missing web page is penalised as a critical error. |
| e | <p>use meta tags and titles to describe page content</p> <ul style="list-style-type: none"> • Failure to use titles and/or META tags to describe page content (e.g. title, keywords, author, description) is penalised as one accuracy error per web page, but see note below. <p>Note: Identical errors in META tags, repeated across all pages, are penalised once only even though the error appears on all web pages. Use of case is not penalised in titles or META tags. Keywords must be separated by a comma, however, missing spaces between keywords are not penalised.</p> |
| f | <p>format text, links and background using body tag</p> <p>If an assignment specifies a background image and a background colour the background image must be displayed on the screen.</p> <ul style="list-style-type: none"> • Failure to display a specified background image is penalised as a critical error • Failure to format text (e.g. heading, subheading, body text) is penalised as one accuracy error per assignment • Failure to format links and background is penalised as one accuracy error per assignment. <p>Note: There must be evidence that each of the styles have been set up as specified on at least one web page. Inconsistent application of the text styles across all pages of the website is penalised under assessment objective 2g.</p> |

| | |
|--|---|
| g | <p>create standard content</p> <p>The standard page content should be identical across the entire website, any inconsistencies will be penalised under this assessment objective.</p> <ul style="list-style-type: none"> • Failure to create standard page content, as specified, is penalised as one accuracy error per assignment, however, see note below. <p>Note: Missing email links/hyperlinks and/or images are penalised under the appropriate assessment objective.</p> |
| h | <p>use appropriate techniques to handle and organise files and web pages</p> <p>Some software automatically generates additional folders (for example to store css/results from a form/shared borders), this is not penalised.</p> <ul style="list-style-type: none"> • Candidates will be penalised as one accuracy error per assignment if all files are not stored in the folder structure as specified in the assignment and/or if they create additional folders within the website structure, however, see note below. <p>Note: Image files must be downloaded into the 'images' folder, failure to do so may result in images not being displayed on the web page(s) and may therefore result in critical errors under assessment objective 2a. Failure to save web pages within the specified file structure may result in critical errors under assessment objective 1d.</p> |
| <p>2 use and format images, text and tables</p> | |
| a | <p>insert text and images</p> <ul style="list-style-type: none"> • Failure to insert any specified image file on the specified page is penalised as a critical error • Failure to insert any specified text file on the specified page is penalised as a critical error • Unrequested amendment(s) to text file(s) are penalised as one accuracy error per assignment • Failure to insert the entire text file on the specified page is penalised as one accuracy error per file • Errors in keyed in text are penalised as one accuracy error per data item. |
| b | <p>proof read to check that text looks professional, using spell and grammar checkers</p> <ul style="list-style-type: none"> • Failure to correct errors using spell and grammar checkers is penalised as one accuracy error per assignment. <p>Note: Unrequested amendments to the text(s) file when using spell and/or grammar checkers are penalised under assessment objective 2a.</p> |

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| c | <p>set image resolution</p> <p>Any method of setting the image resolution is acceptable. This may be set from within the software application, or by using alternative software (e.g. an art/graphics package). In some web creation software a duplicate image is created, this duplicate image may/or may not be stored within the images folder (depending on the software used). This duplicate image must be submitted with the website.</p> <p>Where candidates are required to reduce the resolution of an image, this may need to be done using different software prior to beginning the task.</p> <p>If the software used has a facility for reducing the quality of an image, this is an acceptable method of evidencing this assessment objective.</p> <ul style="list-style-type: none"> • Failure to set the image resolution as specified is penalised as one accuracy error per assignment. |
| d | <p>set image attributes</p> <ul style="list-style-type: none"> • Failure to set image attributes as specified (height, width, alignment, border) is penalised as one accuracy error per assignment. |
| e | <p>rotate/flip image</p> <p>Where candidates are required to rotate/flip an image, this may need to be done using different software prior to beginning the task.</p> <ul style="list-style-type: none"> • Failure to rotate/flip image as specified is penalised as one accuracy error per assignment. |
| f | <p>resize image</p> <ul style="list-style-type: none"> • Failure to resize image(s) as specified is penalised as one accuracy error per assignment. |
| g | <p>create and apply style sheets (css)</p> <p>Any method of creating a style sheet is acceptable. This assessment objective is assessed from the web page when viewed in the browser (not from the source code).</p> <ul style="list-style-type: none"> • Inconsistent display of text styles across all web pages is penalised as one accuracy error per assignment. <p>Note: Errors in the text style are penalised under 1f.</p> |
| h | <p>ensure line, paragraph and page breaks fall in appropriate places</p> <p>This assessment objective is assessed from the web page when viewed in the browser (not from the source code).</p> <ul style="list-style-type: none"> • Failure to ensure line, paragraph and page breaks fall in appropriate places is penalised as one accuracy error per assignment. |
| i | <p>set line spacing</p> <ul style="list-style-type: none"> • Failure to set line spacing as specified is penalised as one accuracy error per assignment. |
| j | <p>insert table to align page content</p> <ul style="list-style-type: none"> • Failure to insert a table to align page content as specified is penalised as one accuracy error per assignment. <p>Note: If any page items are missing/inaccurately displayed as a result of errors in the inserted table, this will be penalised under the appropriate assessment objective(s)</p> |

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| k | <p>insert a table from a spreadsheet</p> <ul style="list-style-type: none"> Failure to insert a table from a spreadsheet as specified is penalised as one accuracy error per assignment Missing data from the spreadsheet file is penalised as one accuracy error per assignment. |
| l | <p>set table/cell alignment</p> <ul style="list-style-type: none"> Failure to set table/cell alignment as specified is penalised as one accuracy error per assignment. |
| m | <p>set table dimensions</p> <ul style="list-style-type: none"> Failure to set table/cell alignment as specified is penalised as one accuracy error per assignment. |
| 3 create and format an interactive form | |
| a | <p>set method and action</p> <ul style="list-style-type: none"> Failure to set the specified method and/or action is penalised as a critical error. |
| b | <p>use common input types</p> <ul style="list-style-type: none"> Failure to use the specified input type is penalised as one accuracy error per input type. |
| c | <p>set input attributes</p> <ul style="list-style-type: none"> Failure to set input attributes that result in an inoperative form (e.g. hidden field/submit button) are penalised as a critical error Failure to set input attributes that do not result in an inoperative form are penalised as one accuracy error per form field. |
| d | <p>test form</p> <ul style="list-style-type: none"> Failure to test the form is penalised as one accuracy error per assignment An inoperative form is penalised as a critical error. <p>An issue has been identified with the Level 2 Unit 7 CLAiT assignments for ITQ unit 81.</p> <p>Learners usually receive a response from http://www.progress-webmail.co.uk/cgi-bin/webmail.cgi confirming their interactive form is working correctly. This is currently not functioning and a correctly set up form will receive a server error.</p> <p>For any learners using the unit 7 assignments for ITQ, when marking, do not penalise the learners for a non-response if the syntax is correct.</p> <p>A correct form will display a '404 server error' and if the address bar displays 'http://www.progress-webmail.co.uk/cgi-bin/webmail.cgi', do not penalise as a critical error for objective 3d. The form should still meet all the other criteria for the task and the test of the form should still take place to fulfil the criteria for 3d. After testing the form the learner must still amend the recipient as specified in the assignment (as failing to do this will still result in a critical error).</p> <ul style="list-style-type: none"> https://www.ocr.org.uk/administration/support-and-tools/siu/clait-itq-interactive-form-responses-040817/ <p>The local assessor should observe this objective. If the candidate does not test the form this should be noted on the appropriate printout.</p> <p>Note: After testing the form the candidate must amend the recipient as specified in the assignment as failing to do this will result in a critical error.</p> |
| 4 create links/hyperlinks | |
| a | <p>use images and text as anchors for hyperlinks</p> <ul style="list-style-type: none"> Failure to use images and/or text as anchors for hyperlinks as specified is penalised as a critical error. |
| b | <p>use hyperlinks to external site</p> <ul style="list-style-type: none"> Failure to use a hyperlink(s) to an external site as specified is penalised as a critical error. |

| | |
|----------|--|
| c | <p>use hyperlinks to internal pages</p> <ul style="list-style-type: none"> • Failure to use a hyperlink(s) to an internal site as specified is penalised as a critical error. |
| d | <p>use e-mail link</p> <ul style="list-style-type: none"> • Failure to use an email link as specified is penalised as a critical error. |
| e | <p>create relative links</p> <p>All links to web pages within the website must be relative. All links to images must be relative and linked to the folder specified.</p> <ul style="list-style-type: none"> • Failure to use relative links as specified is penalised as a critical error. |
| f | <p>test the links</p> <ul style="list-style-type: none"> • Failure to test the links is penalised as one accuracy error per assignment • An inoperative link is penalised as a critical error. <p>The local assessor should observe this objective. If the candidate does not test the link this should be noted on the appropriate printout.</p> |
| 5 | save and upload the website |
| a | <p>upload website to browser</p> <p>Although candidates must appreciate the need to upload/publish web pages using a file exchange program such as FTP or HTTP, they are not required to do this during the assessment. The assignment will only require the website to be loaded into a browser.</p> <ul style="list-style-type: none"> • Failure to upload the website to a browser is penalised as one accuracy error per assignment. <p>The local assessor should observe this objective. If the candidate does not upload the website to a browser this should be noted on the appropriate printout.</p> |
| b | <p>test the site is operational</p> <ul style="list-style-type: none"> • Failure to test the website is operational is penalised as one accuracy error per assignment. <p>The local assessor should observe this objective. If the candidate does not test that the website is operational this should be noted on the appropriate printout.</p> <p>Note: If the website is not operational, any aspects that are not operational will be penalised under the appropriate assessment objective.</p> |
| c | <p>save the website</p> <ul style="list-style-type: none"> • Failure to save the website is penalised as a critical error • Failure save any webpage (html file) is penalised as a critical error • Failure to use the specified filename is penalised as one accuracy error per assignment, however, see note below. <p>Note: If an incorrect filename is used candidates must check that any links to the page are set to the filename used by the candidate or the links will be inoperative and will result in a critical error.</p> |
| d | <p>close website</p> <ul style="list-style-type: none"> • Failure to close the website is penalised as one accuracy error per assignment. <p>The local assessor should observe this objective. If the candidate does not close the website this should be noted on the appropriate printout.</p> |

Marking Reference Grid for Unit 7: Website Creation

Data items:

- a title and META tags
- a line/item of keyed in text
- a drop down list
- a form field
- a word in imported text
- a filename

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|--|--|---------------------|-----------------------|----------------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | use appropriate application software to create a website | Penalised under each assessment objective(s) not evidenced | | | |
| 1b | download files | | ✓ | | |
| 1c | create/name folder(s) * | | ✓ (name) | ✓ (folder) | |
| 1d | create and define web pages | ✓ | | | |
| 1e | use meta tags and titles to describe page content * | | | ✓ (per web page) | |
| 1f | format text, links and background using body tag * | ✓ | ✓ | | |
| 1g | create standard content | | ✓ | | |
| 1h | use appropriate techniques to handle and organise files and web pages * | | ✓ | | |
| 2a | insert text and images * | ✓ | ✓ | ✓ (per file) | ✓ (keyed in text) |
| 2b | proof read to check that text looks professional, using spell and grammar checkers | | ✓ | | |
| 2c | set image resolution | | ✓ | | |
| 2d | set image attributes | | ✓ | | |
| 2e | rotate/flip image | | ✓ | | |
| 2f | resize image | | ✓ | | |
| 2g | create and apply style sheets (css) | | ✓ | | |
| 2h | ensure line, paragraph and page breaks fall in appropriate places | | ✓ | | |
| 2i | set line spacing | | ✓ | | |
| 2j | insert table to align page content | | ✓ | | |
| 2k | insert a table from a spreadsheet | | ✓ | | |
| 2l | set table/cell alignment | | ✓ | | |
| 2m | set table dimensions | | ✓ | | |
| 3a | set method and action | ✓ | | | |
| 3b | use common input types | | | ✓ (Per input type) | |
| 3c | set input attributes * | ✓ | | | ✓ |
| 3d | test form * | ✓ | ✓ | | |

| | | | | | |
|----|---|---|---|--|--|
| 4a | use images and text as anchors for hyperlinks | ✓ | | | |
| 4b | use hyperlinks to external site | ✓ | | | |
| 4c | use hyperlinks to internal pages | ✓ | | | |
| 4d | use email link | ✓ | | | |
| 4e | create relative links | ✓ | | | |
| 4f | test the links * | ✓ | ✓ | | |
| 5a | upload website to browser | | ✓ | | |
| 5b | test the site is operational | | ✓ | | |
| 5c | save the website * | ✓ | ✓ | | |
| 5d | close website | | ✓ | | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

UNIT 8: ELECTRONIC COMMUNICATION

Unit Description

This unit is designed to accredit basic competencies in using email and Personal Information Management (PIM) software to receive, transmit messages and attachments electronically, to organise messages and to set diary entries, create notes and to-do tasks. Candidates will develop familiarity with the software to be used and the concepts of network-based communications, along with an understanding of mailbox management and organiser features.

Unit Content

This unit has been mapped to ITQ Level 2 Unit 34 Using email.

The Assessment Objectives and Knowledge, Skills and Understanding are based on Level 2 CLAiT Plus. Achievement of this unit should be sent to the ITQ Examiner-moderator.

Assessment

Candidates are assessed by means of an OCR-set practical assignment with a notional duration of 3 hours. The assignment is set in a realistic scenario and is designed to allow the candidates to use their knowledge and understanding to demonstrate skill in each assessment objective in a logical and realistic way.

Candidates' work will be centre assessed and externally moderated by OCR. In order to achieve a Pass in this unit, candidates must demonstrate skill in each assessment objective within the stated tolerance of six accuracy errors and without incurring any critical errors. Candidates who do not achieve a Pass may re-take the assessment using a different assignment.

Assessment tasks

Candidates are required to complete several tasks that address all of the assessment objectives identified in the unit content in a holistic and practical way. The assessment will be a practical task, consisting of one or more related tasks with a clear purpose and will be OCR-set.

Evidence

Due to the wide range of software available, additional screen prints may be required to provide evidence for some assessment objectives. Before candidates embark on a course of study, tutors must check that the software to be used will enable the candidate to produce the required printed evidence for each assessment objective.

Where printed evidence is expected, no other form of evidence, such as tutor witness statements will be accepted. Failure to provide the printed evidence will incur the appropriate penalty under each assessment objective not evidenced. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.](#)

A centre using the Level 2 CLAiT Plus option for ITQ can submit candidates' work for this CLAiT unit assignment as evidence for ITQ Unit 34. For guidance on submission, tutors must refer to the ITQ Centre Handbook available on the OCR website.

| Unit Content – Electronic Communication | |
|---|---|
| Assessment Objectives | Knowledge, Understanding and Skills |
| 1 use advanced software facilities to co-ordinate email communications | |
| a create and use email signature | <ul style="list-style-type: none"> • appreciate the implications of using email for business communication (dating, filing, sender's details) • understand the use and purpose of an email signature |
| b create and address new message(s) | <ul style="list-style-type: none"> • understand how to create email messages and attach multiple files, co-ordinating delivery to intended recipients • understand the need for accuracy in addressing • appreciate how to change the design and format of emails (e.g. by using RTF, HTML, plain text) |
| c copy message to other recipients (cc and bcc) | <ul style="list-style-type: none"> • understand the difference between to, cc and bcc in email addressing |
| d prioritise outgoing email messages | <ul style="list-style-type: none"> • understand the importance of prioritising email in business communication |
| e attach multiple files to email message(s) | <ul style="list-style-type: none"> • understand basic file management in relation to attaching documents |
| f compress and/or de-compress email attachments | <ul style="list-style-type: none"> • understand how to reduce file sizes by compressing and de-compressing attachments • understand how to keep the difficulties of sending and receiving large emails to a minimum • appreciate the problems with email e.g. spam, chain-mail and how to minimise risks • understand how to avoid viruses |
| g print messages | <ul style="list-style-type: none"> • appreciate the need for hard copy • understand print facilities in email software |
| h print email folder contents | <ul style="list-style-type: none"> • understand the use of screen captures |
| 2 create and use address book | |
| a store contact details | <ul style="list-style-type: none"> • understand facilities for storage and recall of individual contact details (e.g. name, job title, address, email address, telephone numbers) • appreciate the need for accuracy when setting up new contacts • appreciate what and how different IT activities are affected by laws and guidelines, such as storing names and address |
| b create a group distribution list | <ul style="list-style-type: none"> • understand facilities for storage and recall of group/distribution lists |

| | | |
|-------------------------|---|---|
| c | retrieve and use individual or group stored email addresses | <ul style="list-style-type: none"> understand the retrieval and use of single, multiple and group email address |
| d | print contact and group details | <ul style="list-style-type: none"> understand how to print contact details appreciate the need to minimise wastage of paper |
| e | use personal information manager software to enter information (calendar, notes, to-do tasks) | <ul style="list-style-type: none"> understand what other resources may be provided by email software (e.g. calendar, to-do tasks, notes) and how to use them understand how to set alarms and how to set appointments |
| f | print personal information manager entries | <ul style="list-style-type: none"> appreciate the need for hard copy and the use of condensing entries on printed output |
| 3 manage mailbox | | |
| a | create new private mail folder to store messages relating to an individual | <ul style="list-style-type: none"> understand what limits there may be to the number or size of emails that can be received and stored |
| b | move messages between folders | <ul style="list-style-type: none"> understand the use and purpose of private mail folders to archive email messages appreciate the efficiency of using message rules to move messages |
| c | store attachments outside mailbox structure | <ul style="list-style-type: none"> understand the purpose and use of file storage outside the mailbox structure appreciate appropriate methods of exchanging information e.g. FTP, HTTP |

Marking Criteria for Unit 8: Electronic Communication

In order to achieve a Pass in the assessment for this unit, candidates must complete the assignment without making any **critical errors** as defined below and with no more than **six** accuracy errors.

Critical errors are incurred for any instance of:

- any missing, incomplete or incorrect attachment
- an incorrect or missing email address (in contact details or an email message)
- a missing calendar entry
- incorrect day and/or time for a calendar entry
- a missing printout of any of the following:
 - contact and group details
 - an email message
 - calendar
 - notes
 - to-do tasks

Accuracy errors are incurred for each instance of:

- an error in inputting data (see list of data items)
- an error in completing any other assessment objective as instructed that is not listed as a critical error

Data items for Unit 8, Electronic Communication are:

- a contact entry
- an email subject heading
- content of email message
- content of calendar entry
- content of to-do task
- content of note

Consistent use of case is not penalised if used appropriately (for example, contact details in an address book entered in all capitals even if shown in sentence case in the assignment).

Lack of a capital at the start of a sentence and/or for proper nouns and/or an email message keyed in all capitals is penalised per data item. Inconsistent use of case is penalised as one accuracy error per assignment. Use of case and/or additional or missing full stops, in notes pages/to-do tasks and calendar entries is not penalised.

* Screen printouts are required to evidence certain objectives. Where a screen printout is an assessment objective this will be penalised as one accuracy error for the missing printout. Note, however, that if the required evidence is not provided in alternative format candidates will also be penalised under each assessment objective for which the screen printout provides evidence. [If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.](#)

Where a screen printout is not an assessment objective candidates will only be penalised under the assessment objective(s) for which there is no evidence.

Detailed Marking Criteria for Unit 8: Electronic Communication

Centre assessors must also refer to the General Marking Criteria which applies to all units on page 10.

| 1 use advanced software facilities to co-ordinate email communications | |
|--|---|
| a | <p>create and use email signature</p> <ul style="list-style-type: none"> • Failure to create an email signature as specified is penalised as one accuracy error per assignment • Failure to use the email signature on any/all specified emails is penalised as one accuracy error per assignment. |
| b | <p>create and address new message(s)</p> <ul style="list-style-type: none"> • An incorrect, inaccurate or missing email address is penalised as a critical error • Errors in the heading or the body of the email are penalised as one accuracy error per data item. |
| c | <p>copy message to other recipients (cc and bcc)</p> <p>Candidates must use the bcc (or equivalent) facility where confidentiality of addresses is specified.</p> <ul style="list-style-type: none"> • An incorrect, inaccurate or missing email address is penalised as a critical error • Using the “To” facility, where the “cc” and/or “bcc” facility is specified, is penalised as one accuracy error per assignment • Using the “cc” facility where the “bcc” is specified, and/or using the “bcc” facility where the “cc” facility is specified, is penalised as one accuracy error per assignment. <p>Note: A candidate can incur a maximum of two accuracy errors under this assessment objective, one for not using the “bcc” facility as specified and one for not using the “cc” facility as specified.</p> |
| d | <p>prioritise outgoing email messages</p> <p>Some email software does not allow the setting of priority; where such software is used candidates may indicate priority by entering the word “URGENT” in front of the subject heading.</p> <ul style="list-style-type: none"> • Failure to prioritise outgoing email messages as specified is penalised as one accuracy error per assignment. <p>Note: Evidence of setting must be clearly displayed on the printout. Tutor witness statements are not acceptable in place of printed evidence.</p> |

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|---|--|
| e | <p>attach multiple files to email message(s)</p> <p>Some email programs fail to show evidence of an attachment on the printout, in which case the centre should investigate alternative software, or instruct candidates to provide additional screen printout(s) as evidence.</p> <ul style="list-style-type: none"> • Errors in attaching any/all of the specified files is penalised as a critical error • Any missing file attachment is penalised as a critical error • If candidates attached the zipped file in place of individual files this is penalised as a critical error. <p>Note: Evidence of the attached files (displaying the filenames) must be clearly displayed on the printout. Tutor witness statements are not acceptable in place of printed evidence.</p> |
| f | <p>compress and/or de-compress email attachments</p> <ul style="list-style-type: none"> • Failure to compress/de-compress email attachments is penalised as one accuracy error per assignment, however, see note below. <p>Note: Failure to de-compress email attachments may also result in additional errors under assessment objective 1e.</p> |
| g | <p>print messages</p> <ul style="list-style-type: none"> • A missing message print is penalised as a critical error • Incomplete transaction/header information (e.g. To:, From: Date: Subject: etc) is penalised as one accuracy error per instruction • An incomplete print of an email message is penalised as one accuracy error per assignment, but see note below. <p>Note: Additional error(s) will also be incurred under the appropriate assessment objectives for any missing evidence as a result of an email message not being printed in full.</p> <p>Emails MUST be printed from the sent items folder, in addition to the screen print requested in the assignment.</p> <ul style="list-style-type: none"> • Where a candidate has not printed from the sent items folder, but instead has produced only a screen print, as long as all information required is visible, this is penalised as one accuracy error per assignment. <p>If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.</p> |
| h | <p>print email folder contents</p> <p>The email folder name must be visible on the printout of the email folder. The contents may be displayed either as a list or with the messages displayed in full.</p> <ul style="list-style-type: none"> • Failure to print email folder contents as specified is penalised as one accuracy error per assignment. <p>If you are submitting evidence to OCR electronically, candidate printouts should be provided electronically, where the criteria require evidence of a screen print, the evidence must be clearly shown on the printout and the printout must be large enough to read.</p> |

| 2 create and use address book | |
|--------------------------------------|---|
| a | <p>store contact details</p> <ul style="list-style-type: none"> • A missing and/or incorrect email address for any contact is penalised as a critical error • Failure to store contact details as specified is penalised as one accuracy error per assignment • Errors in contact details (other than an email address) are penalised as one accuracy error per assignment. <p>Note: Additional/missing spaces and/or the addition of a country code and/or brackets in telephone numbers are not penalised even if different from that displayed in the assignment.</p> |
| b | <p>create a group distribution list</p> <ul style="list-style-type: none"> • Failure to create a group distribution list as specified, is penalised as one accuracy error per assignment. <p>Note: Errors in the email address(es) of member(s) of the distribution group are penalised under assessment objective 2a.</p> |
| c | <p>retrieve and use individual or group stored email addresses</p> <p>On printouts from some software it is not evident that stored addresses have been used; where this is the case the local assessor should observe this objective. A note of any error(s) in retrieving and/or using the storage facility should be noted on the appropriate printout.</p> <ul style="list-style-type: none"> • Manually inserting individual and/or group email addresses instead of retrieving them from the stored area is penalised as one accuracy error per assignment. <p>Note: Missing or incorrect email address(es) will be penalised under assessment objective 2a.</p> |
| d | <p>print contact and group details</p> <ul style="list-style-type: none"> • Failure to print contact and group details is penalised as a critical error. <p>Note: Additional error(s) will also be incurred under the appropriate assessment objectives for any missing evidence as a result of an email message not being printed in full.</p> |
| e | <p>use personal information manager software to enter information (calendar, notes, to-do tasks)</p> <ul style="list-style-type: none"> • A missing calendar entry is penalised as a critical error • An incorrect day and/or time for a calendar entry is penalised as a critical error • Failure to enter information in personal information manager software (unless listed as a critical error) is penalised as one accuracy error per data item. |
| f | <p>print personal information manager entries</p> <ul style="list-style-type: none"> • Failure to print any/all personal information manager entries (calendar, notes, to-do tasks) is penalised as a critical error. |

| 3 manage mailbox | |
|-------------------------|--|
| a | <p>create new private mail folder to store messages relating to an individual</p> <ul style="list-style-type: none"> • Failure to create and use a new private folder to store messages as specified is penalised as one accuracy error per assignment. |
| b | <p>move messages between folders</p> <ul style="list-style-type: none"> • Failure to move messages between folders as specified is penalised as one accuracy error per assignment. |
| c | <p>store attachments outside mailbox structure</p> <ul style="list-style-type: none"> • Failure to store attachments outside the mailbox structure is penalised as one accuracy error per assignment. <p>Note: Additional error(s) may also be incurred under the appropriate assessment objective(s) for any missing evidence as a result of attachments not being stored outside the mailbox structure.</p> |

Marking Reference Grid for Unit 8: Electronic Communication

Data items:

- a contact entry
- an email subject heading
- content of email message
- content of calendar entry
- content of to-do task
- content of note

| Assessment Objective | | Critical Error | Accuracy Error | | |
|----------------------|---|----------------|---------------------|------------------|----------------|
| | | | Once per assignment | Each instruction | Each data item |
| 1a | create and use email signature | | ✓ | | |
| 1b | create and address new message(s) * | ✓ | | | ✓ |
| 1c | copy message to other recipients (cc and bcc) * | ✓ | ✓ | | |
| 1d | prioritise outgoing mail messages | | ✓ | | |
| 1e | attach multiple files to email message(s) | ✓ | | | |
| 1f | compress and/or de-compress email attachments | | ✓ | | |
| 1g | print messages * | ✓ | ✓ | ✓ | |
| 1h | print email folder contents | | ✓ | | |
| 2a | store contact details * | ✓ | ✓ | | |
| 2b | create a group distribution list | | ✓ | | |
| 2c | retrieve and use individual or group stored email addresses | | ✓ | | |
| 2d | print contact and group details | ✓ | | | |
| 2e | use personal information manager software to enter information (calendar, notes, to-do tasks) * | ✓ | | | ✓ |
| 2f | print personal information manager entries | ✓ | | | |
| 3a | create new private mail folder to store messages relating to an individual | | ✓ | | |
| 3b | move messages between folders | | ✓ | | |
| 3c | store attachments outside mailbox structure | | ✓ | | |

Note: This grid is provided for general reference, it must not be used as the sole reference for assessment. Tutors must refer to the Detailed Marking Criteria for each unit and to the General Marking Criteria which applies to all units.

For assessment objectives marked with an * above, more than one ruling may apply depending on the type of error made, refer to the Detailed Marking Criteria for the assessment objective.

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5 Administration Arrangements

Please refer to the ITQ Centre Handbook for full details of entering and submitting for ITQ certification (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995)

www.ocr.org.uk/itq

6 Supporting Documentation

6.1 OCR Sample Assessment Material

OCR sample assessment material is available on the OCR website www.ocr.org.uk/itq for Level 2 CLAiT Plus to be used as evidence for ITQ (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995). Centres may choose to use these assignments for formative assessment of candidates.

6.2 Internal Standardisation Form

OCR provides an Internal Standardisation Form which, if completed correctly, permits the centre to submit a single worked copy for each assignment instead of one set per centre assessor. To enable this timesaving option, centres must confirm on the form that all candidates in the batch have been assessed using similar software/hardware set-ups, and that all centre assessors have used the single worked copy for marking purposes. Please use the form [on page 117](#).

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OCR ITQ AWARD/CERTIFICATE/DIPLOMA IN IT USER SKILLS

Internal Standardisation Form

Each Centre Assessor must send their worked copies to their OCR ITQ Examiner-moderator with each batch submitted, in order to ensure the Examiner-moderator is moderating from the same worked copy from which the centre assessor has marked.

This form allows centres with more than one centre assessor to submit a single worked copy to the ITQ Examiner-moderator, to represent the marking for all centre assessors. This single worked copy **must** be in use by all centre assessors as the marking copy, and the signee must take responsibility for standardisation of assessment within their centre.

In the event that work is received from a centre where it is clear that the standard differs considerably between assessors, OCR reserves the right to withdraw those unit(s) which do not meet the standards required and to ask for individual worked copies from named assessors.

Scheme Code:

Centre Number:

Claim Number:

| | | | | | |
|--|--|--|--|--|--|
| | | | | | |
| | | | | | |
| | | | | | |

I confirm that this centre has performed internal standardisation on an ongoing basis to ensure consistency of assessment amongst all of the listed centre assessors, and that each assessor has used the attached worked copy as the basis of their marking.

Name (Please print): _____

Signature: _____ **Date:** _____

Local Assessors (please list):

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7 Further Support and Information

For general enquiries relating to any of the ITQ qualifications (entry codes 03991, 03992, 03993, 03994, 03995, 03996, 03997, 03998, 03999, 13995), please contact the OCR Customer Support Centre by email support@ocr.org.uk

Alternatively, you could visit OCR's website at www.ocr.org.uk for further information.

When using Level 2 CLAiT Plus live assignments as evidence for ITQ, please email CLAiT assessment marking queries to support@ocr.org.uk. Please indicate which ITQ unit or CLAiT paper your query relates to e.g. Level 1/05-06B.

Key changes

| Section | Change | Version |
|---------------|--|------------------|
| Page 4 | <p>Candidates should complete Level 2 CLAiT Plus 2006-2010 assignments now as live assessments.</p> <p>The 2005-2006 Set A and B are withdrawn and must not be used as live assessments for ITQ.</p> | V4, August 2022 |
| Throughout | <p>New text has been added in blue.</p> <p>Changes have been made to provide clarification on common marking queries.</p> <p>Deleted references to 13996 and 13999 (apprenticeships). These close for certification on 31/08/2021.</p> <p>Deleted references to 2005-2006 Set A and B. These have been withdrawn as live assessments for ITQ – candidates should complete 2006-2010 assignments now as live assessments.</p> | V3, August 2021 |
| Page 18 & 119 | Amended contact email address for queries to support@ocr.org.uk | |
| Page 66 | <p>Detailed Marking Criteria for Unit 4: e-Publication Design</p> <p>3a amend text according to proof correction symbols</p> <p>Removed <i>'In this unit only one space should follow punctuation. Inconsistent use of space following punctuation is penalised as one accuracy error per assignment'</i>, we do allow 2 spaces and it is covered in general marking guidance.</p> | |
| Page 67 | <p>4b print colour-separated camera-ready copy</p> <p>DUE TO CHANGES IN VOCATIONAL PRACTICE AND SOFTWARE THIS CRITERIA IS NO LONGER PENALISED – Candidates do still need to include printouts but do not need to evidence as colour-separated printouts.</p> | |
| Page 101 | <p>Detailed Marking Criteria for Unit 7: Website Creation</p> <p>3d test form</p> <p>Please see this section for additional information about an issue identified with the Level 2 Unit 7 CLAiT assignments for ITQ unit 81.</p> | |
| 7 | Updated contact details for assessment marking queries. | V2, October 2018 |