

# Learning Assessment Guide

## Unit Standard 2784 – Version 5

**Create and use a simple computer spreadsheet to solve a problem**

**Level 2 – 5 Credits**

<b>Assessment Summary</b>			
<b>Learner to complete</b>			
Learner's name:			
Employer:			
NSN no. (ROL):		DOB:	
Signed:		Date:	
<b>Assessor to complete</b>			
<input type="checkbox"/> Meets requirements <input type="checkbox"/> More training required <input type="checkbox"/> More evidence required			
Assessor's name:		Assessor's No.	
Signed:		Date:	

## Before you begin...

- As well as this Learning Assessment Guide, you may also want to refer to the unit standard from the NZQA website (<http://www.nzqa.govt.nz>).
- Read the Trainee Information Kit. The kit contains important information and guidelines for Learners and can be found on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.
- Check the learning resources available for this unit standard on the Learning State website (<http://www.learningstate.govt.nz>) under Learners, then Learning Assessment Guides.

The tasks in this assessment are designed to show your assessor that you can:

- Plan a simple spreadsheet to provide a solution to a problem.
- Produce a simple spreadsheet in accordance with the plan.
- Use the spreadsheet to provide a solution.
- Evaluate the spreadsheet.

This Learning Assessment Guide is made up of:

- Tasks for you to complete.
- Observation checklist that the approved observer or assessor will use to record your performance.
- Verification Form.
- Assessment Guide that the assessor will use to assess your competence.

Special notes relating to this unit standard:

1. Learners are required to plan, produce, use and evaluate one simple spreadsheet to provide a solution to a problem. The problem may be either part of the learner's employment tasks (in the case of workplace assessment) or be a set exercise.
2. The supplied brief must clearly identify the outcomes to be met by the solution. The brief must contain requirements against which the success or otherwise of the spreadsheet can be evaluated.
3. Definitions  
A *plan* outlines how the requirements of the brief will be realised

## Assessment Task One – Element 1

### Introduction

This assessment activity is designed to assess your ability to plan a simple spreadsheet to provide a solution to a problem.

### Instructions

- Provide a plan for the spreadsheet you will be creating and using. This may be for a spreadsheet you have created within the last two years or a new one.
  
- The plan must:
  1. Meet the requirements of the brief
  2. Identify the purpose of the spreadsheet.
  3. Include an outline of the spreadsheet specifications and/or features required to provide a solution.
  
- Provide or describe the brief that the plan is intended to address. It should identify the outcomes for the spreadsheet and requirements for evaluating the success of the spreadsheet.

## Assessment Task Two – Elements 2 and 3

### Introduction

Assessment task two is designed to assess your ability to produce a spreadsheet in accordance with the plan and to use it to provide a solution.

### Instructions

- If you are using a spreadsheet you have created previously, you must provide evidence that you can perform all the tasks listed below. Ask your manager or team leader to sign the section of the verification form that confirms you can perform the tasks, and provide a spreadsheet you have created that contains the formulae/functions listed.
- Otherwise, create your spreadsheet. Some parts of this task will need to be observed by your assessor or an approved observer such as your manager. An Observation Checklist follows which will outline the tasks that must be observed.
- Enter and format data to produce the spreadsheet. Cell width, alignment, text and number formats must all be appropriate to the data type and quantity. Some of this process must be observed.
- Save your spreadsheet and print the worksheet and the formulae.
- Open your spreadsheet whilst being observed.
- Enter new data into the spreadsheet.
- Produce the graph as required by the brief.
- Print out the required spreadsheet.
- You must demonstrate knowledge of use of the following formulae. If it is not included in your spreadsheet, show your assessor or observer that you are able to use these formulae and functions.
  - Add
  - Subtract
  - Multiply
  - Divide
  - Sum
  - Average
  - Maximum
- Ask your Manager or Team Leader to complete section of the Verification Form. This form is at the end of task 3.
- Print out of spreadsheet contents.

**Observation Checklist**  
(For use by assessor or approved observer)

<b>Name of Learner:</b>	
<b>Name of observer / assessor:</b>	
<b>Date observation took place:</b>	

Please indicate if the learner has met the criteria. Use the space to add comment for feedback to the learner and for moderation purposes.

<b>Observed that the learner:</b>	<b>Observer comments</b>	<b>Yes / No</b>
Can create a new spreadsheet.		
Can format cells including <ul style="list-style-type: none"> <li>• Cell width</li> <li>• Alignment</li> <li>• Text and number formats</li> </ul>		
Can use the following functions / formulae: <ol style="list-style-type: none"> <li>1. Add</li> <li>2. Subtract</li> <li>3. Multiply</li> <li>4. Divide</li> <li>5. Average</li> <li>6. Minimum</li> <li>7. Any other functions / formulae:</li> </ol>		
Can produce a graph		
Can save and open a spreadsheet file.		

**Assessor / Observer:**

**Signature:**

**Date of observation:**

## Assessment Task Three – Element 4

### Introduction

Assessment task four is designed to assess your ability to evaluate the spreadsheet.

### Instructions

- Using your new database or one that you have already created, complete the attached evaluation form. Hand the form to your assessor.
- Ask your Manager/Team Leader to complete Section 3 of the Verification Form.

**Evaluation Form**  
(For use by learner)

<b>Name of learner:</b>	
<b>Purpose of Spreadsheet:</b>	
<b>File name:</b>	

Please indicate that you have checked the spreadsheet as follows and that it meets the requirements of the supplied brief.

<b>Spreadsheet is...</b>	<b>Comments</b>	<b>Yes / No</b>
Accurately formatted		
Readable and legible		
Professionally presented		
Checked for data integrity		
Accurate		
Compliant with the brief		

Modifications: (if any)

**Signed:** \_\_\_\_\_ (Learner)

Assessor's Notes

**Assessor:**

**Signature:**

**Date:**

## Manager's Verification Form

<b>Name of Learner:</b>			
<b>Name of Verifier:</b>			
<b>Position:</b>		<b>Phone:</b>	

\_\_\_\_\_ is currently being assessed toward Unit Standard 2874 'Create and use a simple computer spreadsheet to solve a problem.'

### Section One - Planning

This section confirms that the learner has planned the spreadsheet in response to the supplied brief. They will provide you with a copy of the plan. Your signature below confirms that the learner has successfully completed the plan without the assistance of others.

Comments:

--

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

### Section Two – Creation

Your signature below confirms that the learner has created the spreadsheet in response to the supplied brief, formatted cells and their contents correctly, added new data and produced a graph.

It also confirms that the learner is able to perform the following operations when using a spreadsheet, and can use the listed functions/formulae: (✓)

- |                                   |                                   |
|-----------------------------------|-----------------------------------|
| <input type="checkbox"/> Save     | <input type="checkbox"/> Subtract |
| <input type="checkbox"/> Open     | <input type="checkbox"/> Divide   |
| <input type="checkbox"/> Print    | <input type="checkbox"/> Sum      |
| <input type="checkbox"/> Add      | <input type="checkbox"/> Average  |
| <input type="checkbox"/> Multiply | <input type="checkbox"/> Maximum  |

Comments:

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

### Section Three - Evaluation

Your signature below confirms that the learner evaluated their spreadsheet against compliance with the brief, and checked it for:

- Appropriate formatting
- Readability
- Legibility
- Presentation
- Accuracy
- Data integrity

Comments:

Signed: \_\_\_\_\_

Date: \_\_\_\_\_

Thank you for your assistance.

## Assessment Guide

These are the evidence and judgements that your assessor will use to assess your competence in unit standard 2784.

<b>Task / Element</b>	<b>Evidence required</b>	<b>Judgement</b>
<p><i>Task 1 / Element 1</i></p> <p>Learner must plan a spreadsheet in response to a supplied brief.</p>	<p>Written or oral plan.</p> <p>Manager's Verification Form.</p>	<p>Plan identifies the purpose of the spreadsheet.</p> <p>Plan includes an outline of the spreadsheet specifications and/or the features required to provide a solution.</p>
<p><i>Task 2 / Element 2</i></p> <p>Learner must create their spreadsheet in accordance with the plan.</p>	<p>Hard copy of spreadsheet file.</p> <p>Manager's Verification Form.</p> <p>Completed Observation Checklist.</p>	<p>Learner enters and formats data and cells appropriately.</p> <p>Learner demonstrates use of the following functions/formulae:</p> <ul style="list-style-type: none"> <li>• add</li> <li>• subtract</li> <li>• multiply</li> <li>• divide</li> <li>• sum</li> <li>• average</li> <li>• maximum</li> <li>• any others.</li> </ul> <p>Learner saves a spreadsheet file.</p>
<p><i>Task 2 / Element 3</i></p> <p>The learner uses the spreadsheet to provide a solution.</p>	<p>Completed Observation Checklist.</p> <p>Manager's Verification Form.</p> <p>Hard copy of spreadsheet file.</p>	<p>The learner locates and opens the file, and enters new variables.</p> <p>The learner produces a graph as part of the solution.</p> <p>The learner prints the revised spreadsheet.</p>

<b>Task / Element</b>	<b>Evidence required</b>	<b>Judgement</b>
<p><i>Task 3 / Element 4</i></p> <p>The learner must evaluate their spreadsheet against the supplied brief.</p>	<p>Evaluation Form.</p> <p>Manager's Verification Form.</p>	<p>The spreadsheet is evaluated against the following criteria:</p> <ul style="list-style-type: none"><li>• accuracy</li><li>• readability</li><li>• legibility</li><li>• presentation</li><li>• appropriate data</li><li>• correct data</li><li>• compliance with the brief.</li></ul> <p>Modifications made if/as required and compliance with the brief is confirmed.</p>