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## Making entries for Functional Skills via Interchange

A step-by-step guide for centres



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## Introduction

This guide demonstrates how to make entries for Functional Skills via Interchange.

### **Interchange**

For help getting started with Interchange, please see our quick start guide

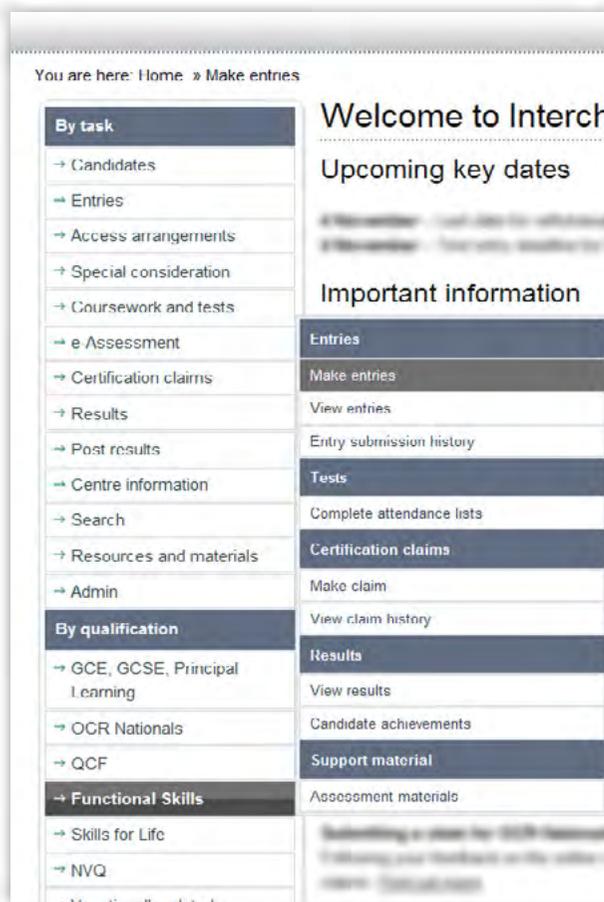
### **Interchange quick start guide**

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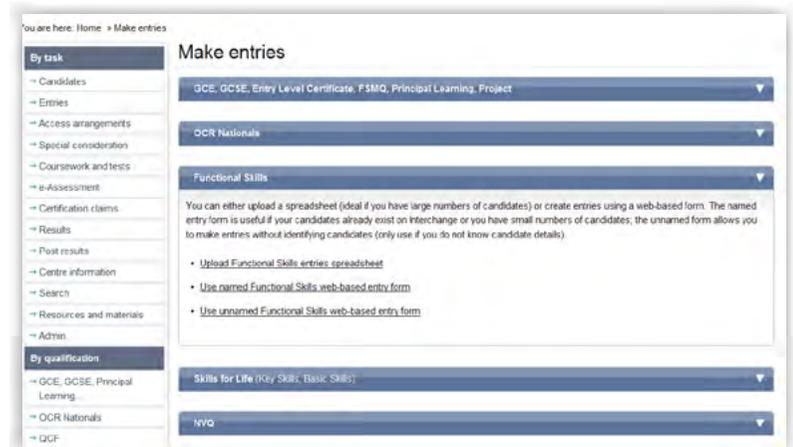
## Log in to Interchange

To get started, log in to Interchange, hover over 'Functional Skills' in the left-hand menu and then click on 'Make entries'. For **named** entries, in most cases, you have a choice: you can either upload a spreadsheet or use a web-based form. For **unnamed** entries, you must use the web-based form.

Choose 'Functional Skills' from the left-hand menu



Choose entry method



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### Named entries: uploading a spreadsheet

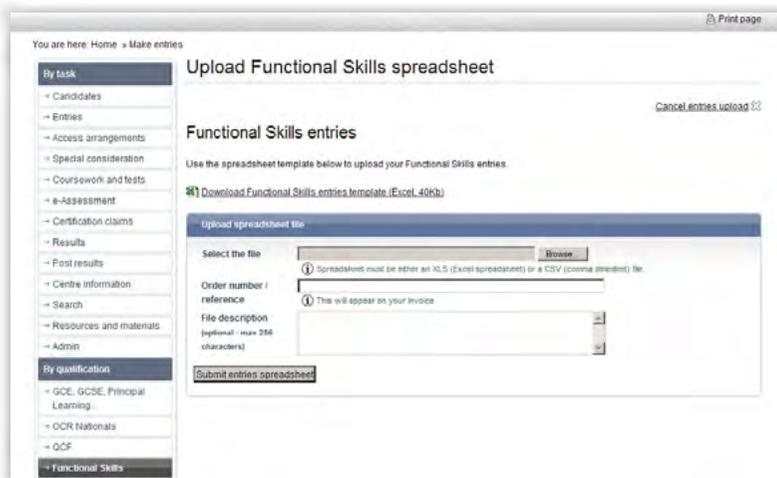
#### Download and complete the entries spreadsheet

This method is ideal if you have large numbers of candidates. Click on the 'Upload Functional Skills entries spreadsheet' link and then download and save the spreadsheet template. Complete the spreadsheet – either manually or by importing data from your management information system.

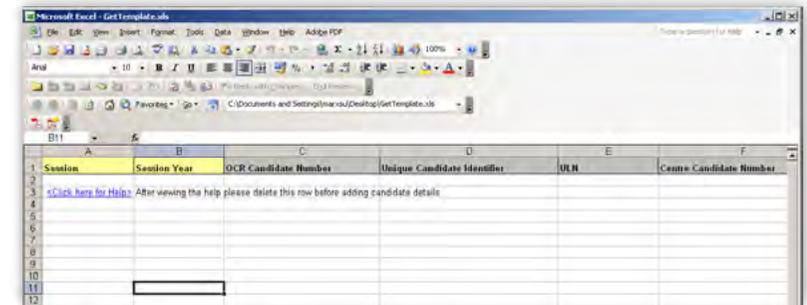
**Note:** If you need help filling out the spreadsheet, read the instructions on how to complete it by clicking on the help link (delete this line from the spreadsheet before you submit it).

When you have completed the spreadsheet and are ready to make your entries, click on 'Browse' to find your saved spreadsheet, add an order number or reference in the box provided and then click on 'Submit entries spreadsheet'.

#### Download spreadsheet



#### Complete spreadsheet



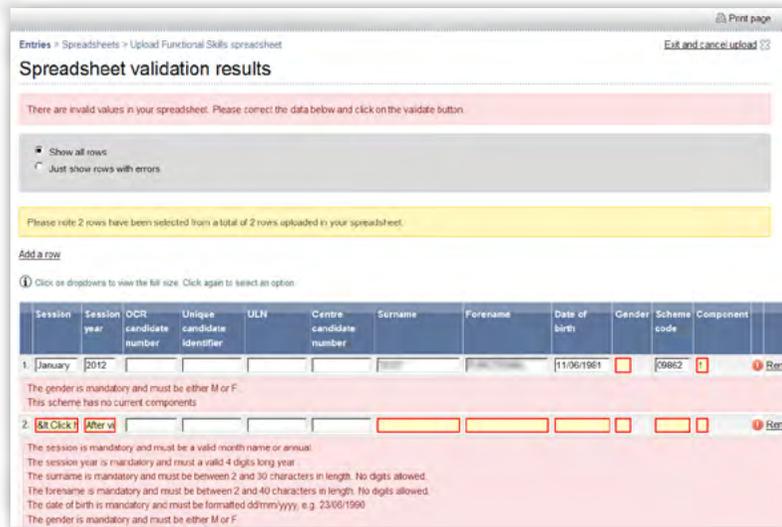
#### Spreadsheet validation

Once you've clicked 'Submit entries spreadsheet', Interchange will automatically validate the information. Any errors will show up in red. You will need to correct these before your entries can be processed. If necessary, make the amendments to your entry information and then click on 'Submit'. You will then see a confirmation page where you can download a copy of your entries for your records.

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Spreadsheet validation



Spreadsheet validation results

There are invalid values in your spreadsheet. Please correct the data below and click on the validate button.

Show all rows  
 Just show rows with errors

Please note: 2 rows have been selected from a total of 2 rows uploaded in your spreadsheet.

Add a row

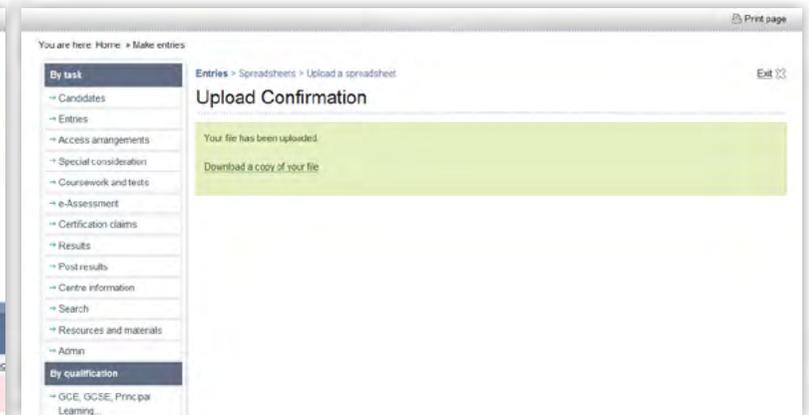
Click on dropdowns to view the full size. Click again to select an option.

| Session | Session year | OCR candidate number | Unique candidate identifier | ULN | Centre candidate number | Surname | Forename | Date of birth | Gender | Scheme code | Component |
|---------|--------------|----------------------|-----------------------------|-----|-------------------------|---------|----------|---------------|--------|-------------|-----------|
| 1       | January      | 2012                 |                             |     |                         |         |          | 11/06/1981    |        | 09862       |           |
| 2       | After v      |                      |                             |     |                         |         |          |               |        |             |           |

The gender is mandatory and must be either M or F.  
This scheme has no current components

The session is mandatory and must be a valid month name or annual.  
The session year is mandatory and must be a valid 4 digits long year.  
The surname is mandatory and must be between 2 and 30 characters in length. No digits allowed.  
The forename is mandatory and must be between 2 and 40 characters in length. No digits allowed.  
The date of birth is mandatory and must be formatted dd/mm/yyyy, e.g. 23/06/1990.  
The gender is mandatory and must be either M or F.

Upload confirmation



Upload Confirmation

Your file has been uploaded.

[Download a copy of your file](#)

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### Named entries: using a web-based form

This method is useful if your candidates already exist on Interchange or you only have a few candidates to enter.

#### Select assessment

First, click on the **named** web-based entry form link. All the qualifications for which you are approved will appear in a dropdown list.

Select the qualification you require and click 'OK'.

#### Select assessment



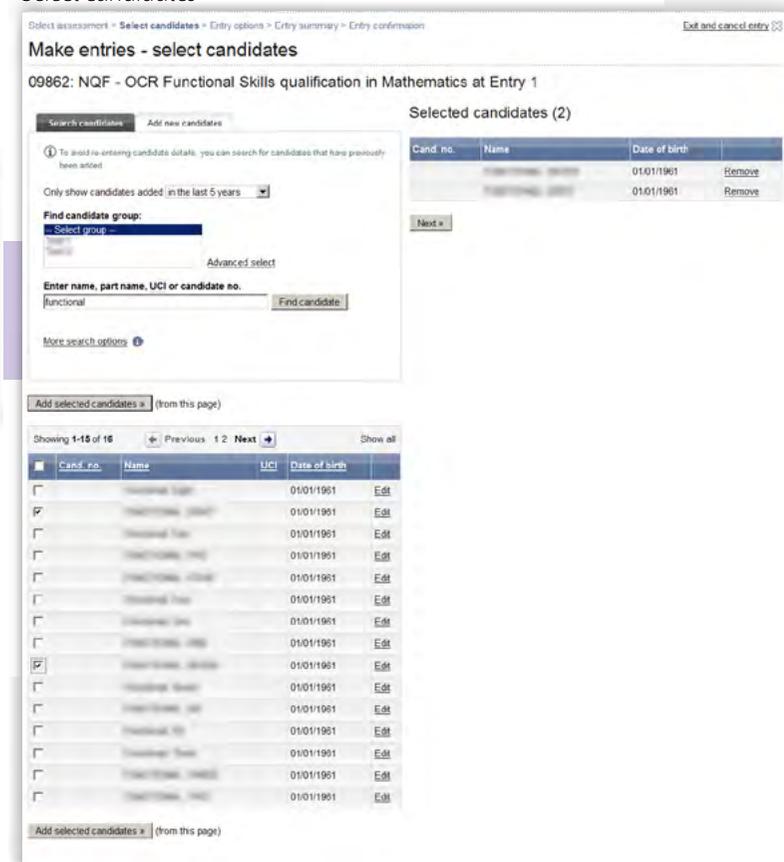
#### Select candidates

Next, you need to select your candidates. You can do this by choosing individual candidates or whole candidate groups. You should select existing candidates rather than creating new ones; however, if you cannot find a candidate, you can enter their details. When searching for existing candidates, you can restrict the search to show only candidates added during a given time period, from 'today' to 'in the last five years'.

Select the candidate by clicking in the tick box next to their details and then clicking the 'Add selected candidates' button. The candidate will then appear in the list on the right-hand side of the screen. Once you have selected all the candidates you need, click 'Next'.

**Note:** You can create bespoke candidate groups within Interchange, tailored to include candidates of your choice. To create a bespoke candidate group, log in to Interchange, hover over 'Candidates' in the left hand menu and click on 'Candidate groups'.

#### Select candidates



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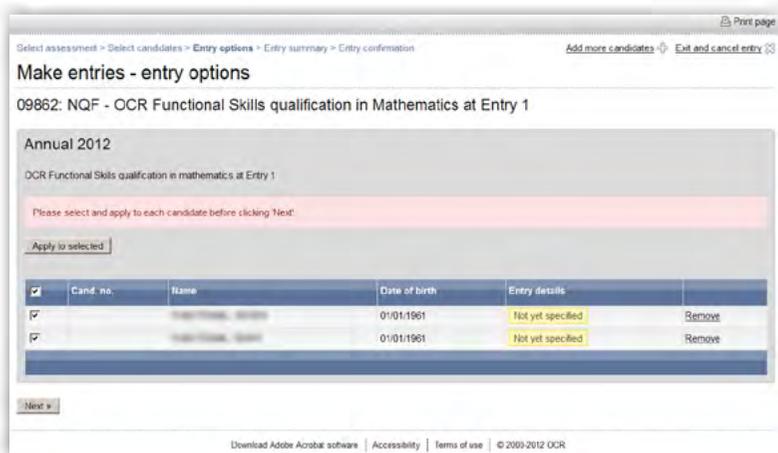
### Select entry options

For examined units (Levels 1 and 2 English Reading and Writing, ICT and Maths) you will next need to select a **series** from the dropdown list. For English SLC, you will need to select 'Annual 2012'; for Entry Level qualifications, 'Annual 2012' will be automatically displayed for you.

You then need to select an **option** (this is where you choose the relevant **unit**) from the dropdown list. For qualifications that only have one unit, this unit will automatically be displayed. For English, you will need to select the relevant unit.

Ensure that all the candidates are 'ticked' and then click 'Apply to selected'. Repeat this process until you have input entry options for all candidates in the list and, once you're finished, click 'Next'.

#### Select entry options (single-unit qualifications)



Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation

Make entries - entry options

09862: NQF - OCR Functional Skills qualification in Mathematics at Entry 1

Annual 2012

OCR Functional Skills qualification in mathematics at Entry 1

Please select and apply to each candidate before clicking 'Next'

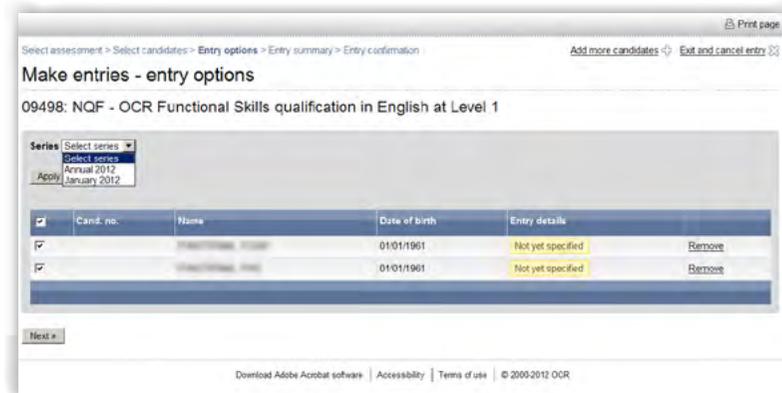
Apply to selected

| <input checked="" type="checkbox"/> | Cand. no.            | Name                 | Date of birth | Entry details     |        |
|-------------------------------------|----------------------|----------------------|---------------|-------------------|--------|
| <input checked="" type="checkbox"/> | 10000000000000000000 | 10000000000000000000 | 01/01/1961    | Not yet specified | Remove |
| <input checked="" type="checkbox"/> | 10000000000000000000 | 10000000000000000000 | 01/01/1961    | Not yet specified | Remove |

Next >

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#### Select entry options (multiple-unit qualifications)



Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation

Make entries - entry options

09498: NQF - OCR Functional Skills qualification in English at Level 1

Series: Select series

Annual 2012

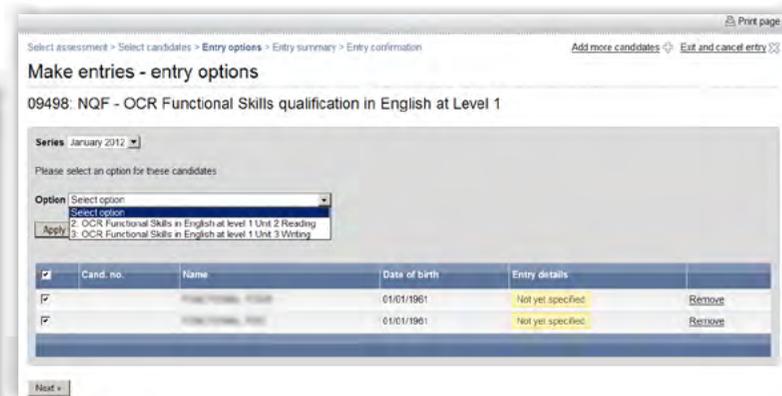
Option: Select option

OCR Functional Skills in English at level 1 Unit 2 Reading

| <input checked="" type="checkbox"/> | Cand. no.            | Name                 | Date of birth | Entry details     |        |
|-------------------------------------|----------------------|----------------------|---------------|-------------------|--------|
| <input checked="" type="checkbox"/> | 10000000000000000000 | 10000000000000000000 | 01/01/1961    | Not yet specified | Remove |
| <input checked="" type="checkbox"/> | 10000000000000000000 | 10000000000000000000 | 01/01/1961    | Not yet specified | Remove |

Next >

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Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation

Make entries - entry options

09498: NQF - OCR Functional Skills qualification in English at Level 1

Series: January 2012

Please select an option for these candidates

Option: Select option

OCR Functional Skills in English at level 1 Unit 3 Writing

| <input checked="" type="checkbox"/> | Cand. no.            | Name                 | Date of birth | Entry details     |        |
|-------------------------------------|----------------------|----------------------|---------------|-------------------|--------|
| <input checked="" type="checkbox"/> | 10000000000000000000 | 10000000000000000000 | 01/01/1961    | Not yet specified | Remove |
| <input checked="" type="checkbox"/> | 10000000000000000000 | 10000000000000000000 | 01/01/1961    | Not yet specified | Remove |

Next >

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### Submit your entries

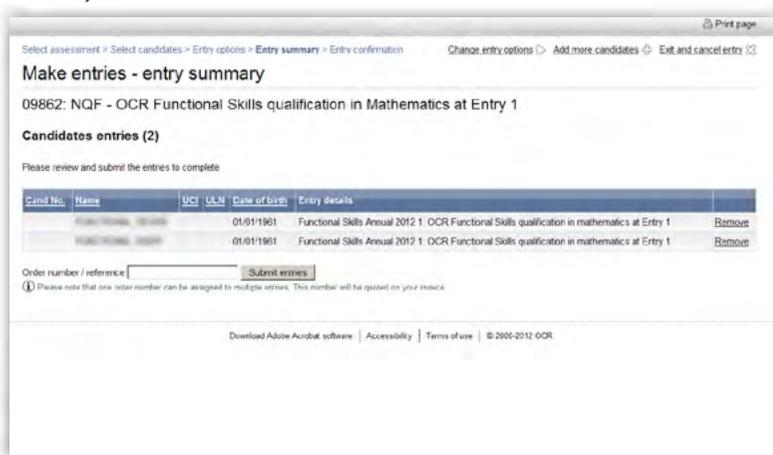
You will then see the entry summary screen. Here, you can review the details of your entries before submitting them.

**Note:** If any of these details are incorrect, you must amend them **before** you submit. If you want to go back and amend the entry details, click on the relevant link on the right-hand side of the screen ('Change entry options', 'Add more candidates' or 'Exit and cancel entry') or, if you simply want to remove a candidate from the entry, click 'Remove' next to their name.

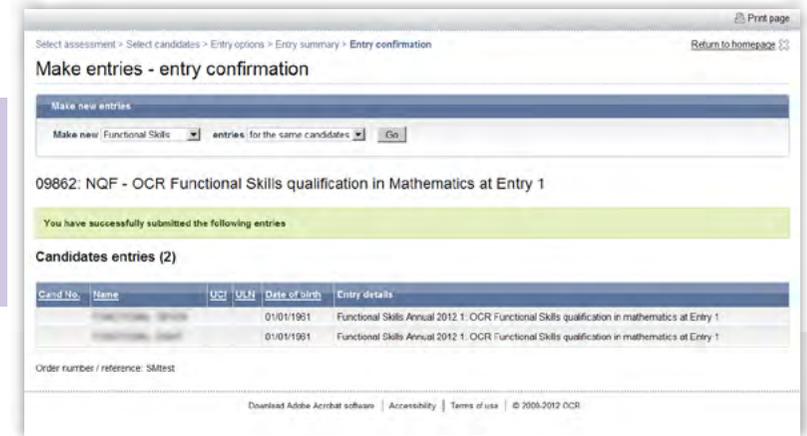
You can enter an order number/reference here if you wish. The order number will be quoted on your centre's invoice.

Once you've checked the details, added an order number (if necessary) and you're happy that everything is correct, click on 'Submit entries' to submit your Functional Skills entries. You will then see a confirmation page, to confirm that your entries have uploaded successfully.

#### Submit your entries



#### Entry confirmation



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### Unnamed entries: using a web-based form

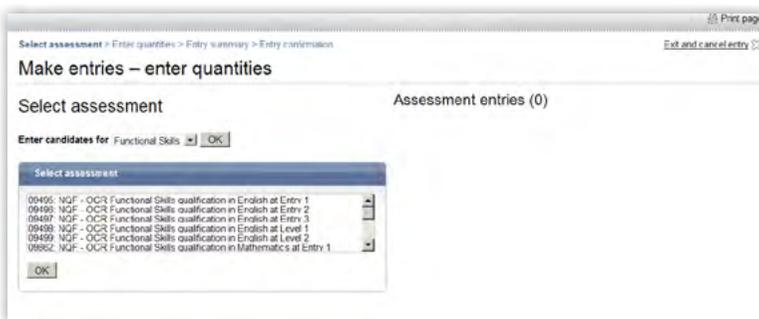
To make unnamed entries, you use a web-based form.

#### Select assessment

Click on the 'Use unnamed Functional Skills web-based entry form' link. All the Functional Skills qualifications for which you are approved will appear in the dropdown list.

Select the qualification you require and click 'OK'.

*Select assessment*



#### Select entry options

For examined units (Levels 1 and 2 English Reading and Writing, ICT and Maths) you will next need to select a **series** from the dropdown list. For English SLC, you will need to select 'Annual 2012'; for Entry Level qualifications, 'Annual 2012' will be automatically displayed for you.

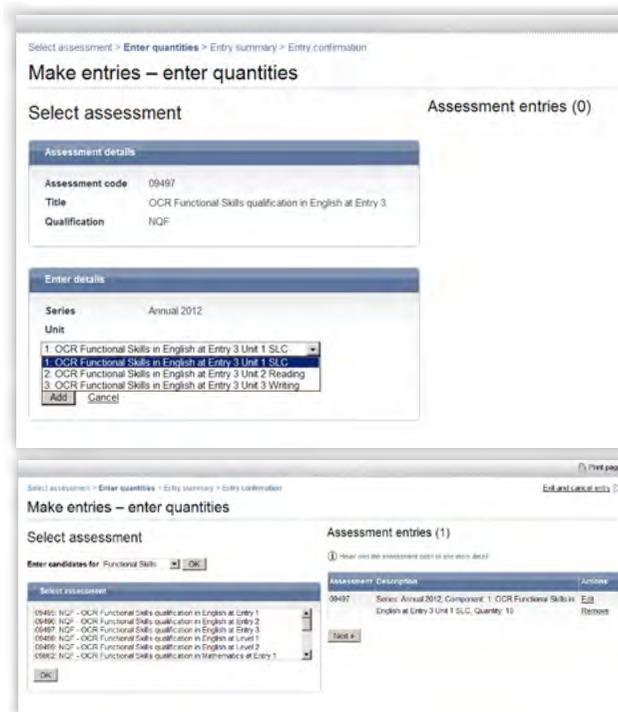
You then need to select an **option** (this is where you choose the relevant **unit**) from the dropdown list. For qualifications that only have one unit, this unit will automatically be displayed. For English, you will need to select the relevant unit.

Next, enter the number of entries you wish to make and click 'Add'. The entries will then appear in the list on the right-hand side of the screen.

**Note:** you can edit or cancel entries that appear in the list on the right-hand side of the screen before you proceed to the next step.

Once you have made all the entries you need, click 'Next'.

*Select entry options (multiple-unit qualifications)*



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### Submit your entries

You will then see the entry summary screen. Here, you can review the details of your entries before submitting them.

**Note:** If any of these details are incorrect, you must amend them **before** you submit. If you want to go back and amend the entry details, click on the relevant link on the right-hand side of the screen ('Change entry options', 'Add more candidates' or 'Exit and cancel entry') or, if you simply want to remove a candidate from the entry, click 'Remove' next to their name.

You can enter an order number/reference here if you wish. The order number will be quoted on your centre's invoice.

Once you've checked the details, added an order number (if necessary) and you're happy that everything is correct, click on 'Submit entries' to submit your Functional Skills entries.

You will then see a confirmation page, to confirm that your entries have uploaded successfully.

#### Entry summary



#### Entry confirmation

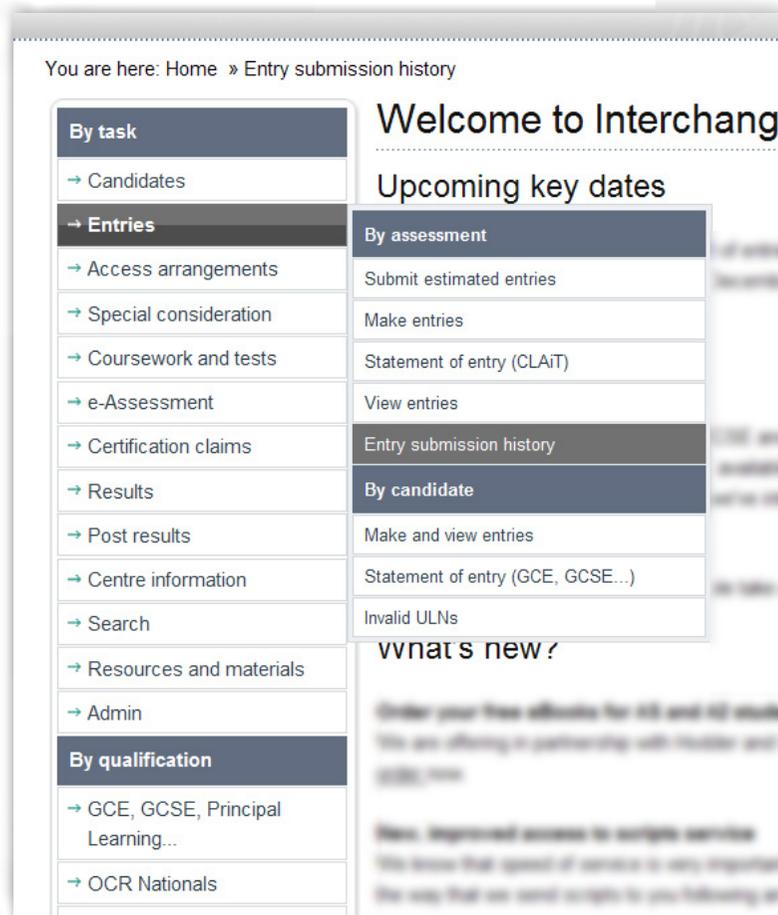


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## Viewing entries

You can view all entry information within Interchange. To access this area, hover over 'Entries' in the left-hand menu and then click on 'Entry submission history'. Next, click on the 'Functional Skills' heading – from here, you can view details of all named and unnamed entries.

Select 'Entry submission history' from the left-hand menu



You are here: Home » Entry submission history

**Welcome to Interchange**

**Upcoming key dates**

**By task**

- Candidates
- Entries**
- Access arrangements
- Special consideration
- Coursework and tests
- e-Assessment
- Certification claims
- Results
- Post results
- Centre information
- Search
- Resources and materials
- Admin

**By qualification**

- GCE, GCSE, Principal Learning...
- OCR Nationals

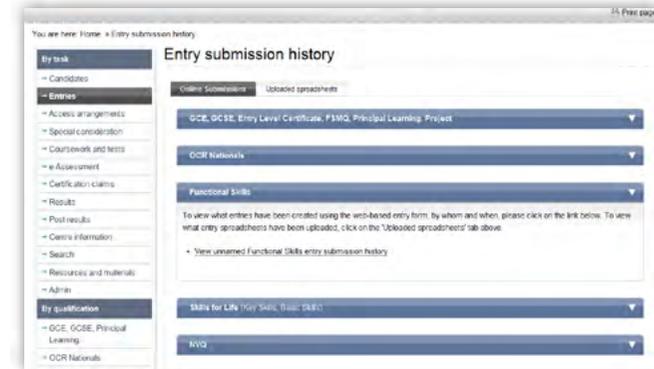
**By assessment**

- Submit estimated entries
- Make entries
- Statement of entry (CLAiT)
- View entries
- Entry submission history**

**By candidate**

- Make and view entries
- Statement of entry (GCE, GCSE...)
- Invalid ULNs

### Entry submission history



You are here: Home » Entry submission history

**Entry submission history**

**By task**

- Candidates
- Entries**
- Access arrangements
- Special consideration
- Coursework and tests
- e-Assessment
- Certification claims
- Results
- Post results
- Centre information
- Search
- Resources and materials
- Admin

**By qualification**

- GCE, GCSE, Principal Learning
- OCR Nationals

**Uploaded spreadsheets**

GCE, GCSE, Entry Level Certificate, FSMQ, Principal Learning, Project

OCR Nationals

**Functional Skills**

To view what entries have been created using the web-based entry form, by whom and when, please click on the link below. To view what entry spreadsheets have been uploaded, click on the 'Uploaded spreadsheets' tab above.

View unnamed Functional Skills entry submission history

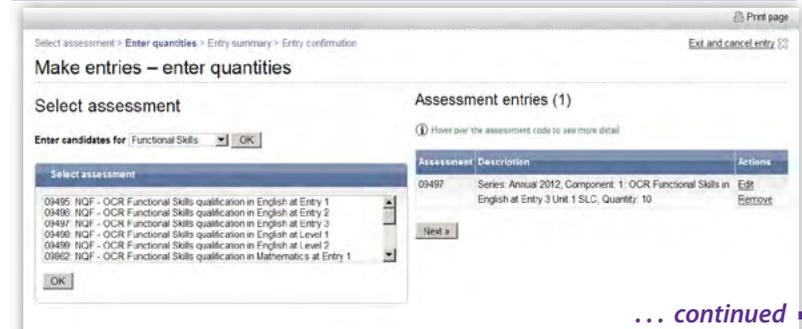
**Skills for Life (SfL) Skills (SfL) Skills**

None

### Named entries

Click on the 'Uploaded spreadsheets' tab. You will then see a list of all named entries, with the most recent at the top of the list. You can filter the results by selecting a date range and order number (if applicable). To view the entries, click on 'View details' in the 'Action' column.

**Note:** Each entry submission will have a status in the 'Status' column. At the bottom of the page, you will see a 'Spreadsheet upload status help' table, explaining each of the status messages and whether any action is required by your centre.



Select assessment » Enter quantities » Entry summary » Entry confirmation

**Make entries – enter quantities**

Select assessment

Enter candidates for: Functional Skills

**Assessment entries (1)**

| Assessment | Description   | Actions                 |
|------------|---|-------------------------|
| 09497      | Series: Annual 2012, Component: 1: OCR Functional Skills in English at Entry 3 Unit 1 SLC, Quantity: 10 | View details<br>Refresh |

... continued

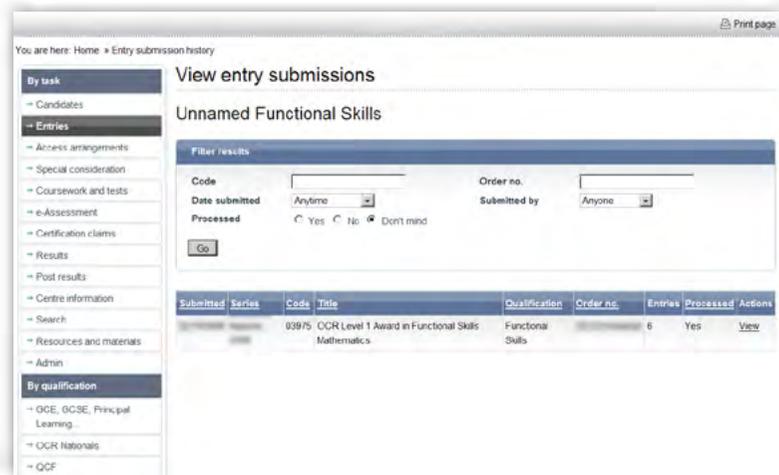
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### Unnamed entries

Click on the 'View unnamed Functional Skills entry submission history' link. You will then see a list of all unnamed entries, with the most recent at the top of the list. You can filter the results by selecting various search criteria including entry code, submission date, process status, order number and submitter.

To view the entries, click on 'View' in the 'Actions' column.

*View entry submission history (unnamed entries)*



The screenshot shows the 'View entry submissions' page for 'Unnamed Functional Skills'. It includes a navigation menu on the left with options like 'Candidates', 'Entries', 'Access arrangements', etc. The main content area has a 'Filter results' section with dropdown menus for 'Code', 'Date submitted' (set to 'Anytime'), and 'Submitted by' (set to 'Anyone'). Below the filters is a table with the following data:

| Submitted | Series | Code  | Title  | Qualification     | Order no. | Entries | Processed | Actions              |
|-----------|--------|-------|--|-------------------|-----------|---------|-----------|----------------------|
|           |        | 03975 | OCR Level 1 Award in Functional Skills Mathematics | Functional Skills |           | 6       | Yes       | <a href="#">View</a> |

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## Further support

### OCR Customer Contact Centre

02476 851509

[vocational.qualifications@ocr.org.uk](mailto:vocational.qualifications@ocr.org.uk)