



# Interchange **Step-by-step** guide

Cambridge  
Technicals Entries

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## Making entries for Cambridge Technicals

A step-by-step guide for centres



Welcome to Intercha



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### — Introduction

This guidance demonstrates how to make entries for Cambridge Technicals via Interchange.

#### **Interchange**

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

#### **Interchange quick start guide**





# Interchange Step-by-step guide

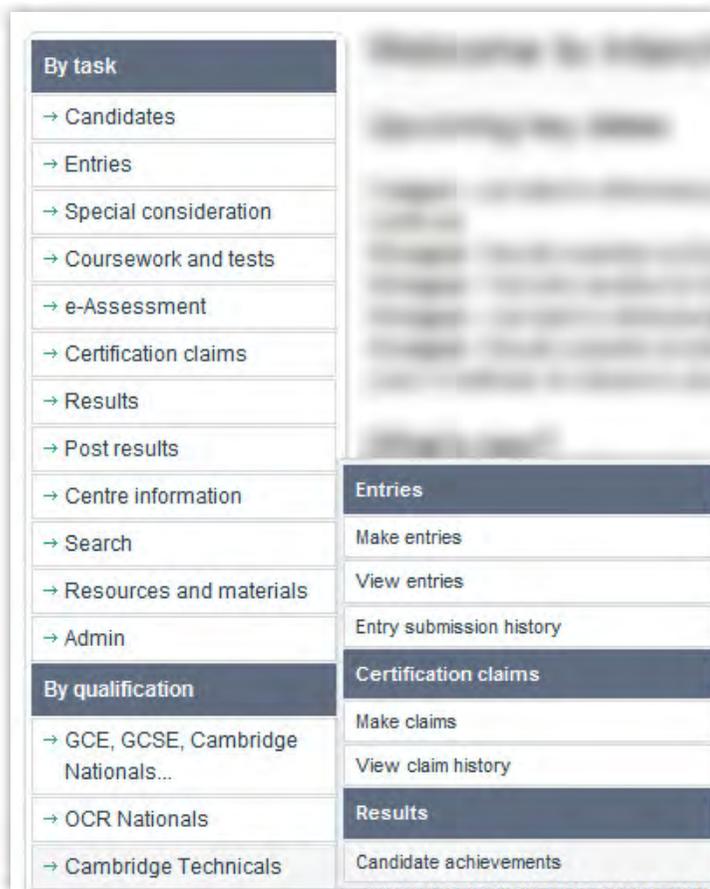
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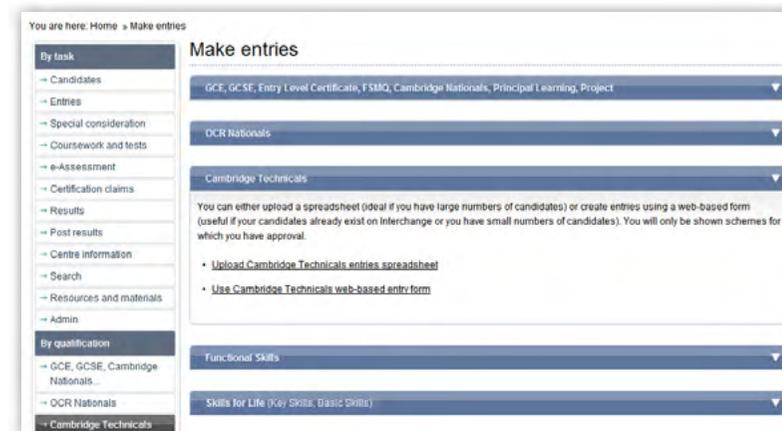
## Log into Interchange

To get started, log in to Interchange, hover over Cambridge Technicals in the left-hand menu and then click on 'Make entries'. You then have a choice you can either upload a spreadsheet or use a named web-based entry form.

*Choose Cambridge Technicals from the left-hand menu*



*Choose entry method*



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## Uploading a spreadsheet

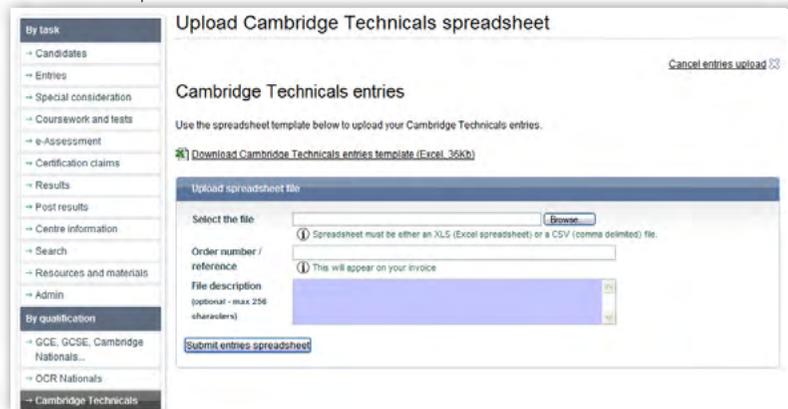
### Download and complete the entries spreadsheet

This method is ideal if you have large numbers of candidates. Click on 'Upload Cambridge Technicals entries spreadsheet' 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

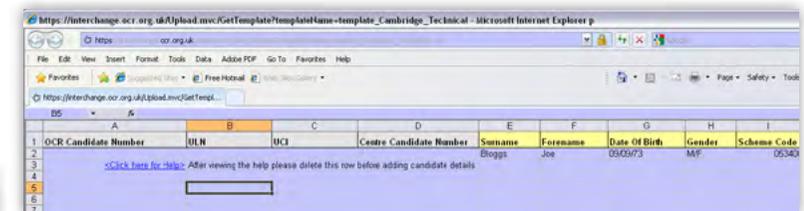


Where possible, please enter the candidate's unique candidate identifier (UCI). Also, please ensure date of birth and scheme code fields are formatted as text, as this will reduce the number of validation errors you are likely to receive.

When making full award entries, enter the main entry code, leaving the unit columns blank. If you are making unit entries, enter the main entry code plus the unit number(s) in the relevant columns.

Please see 'Click here for Help' for further guidance.

#### Complete spreadsheet



1	OCR Candidate Number	UCN	UCI	Centre Candidate Number	Surname	Forename	Date Of Birth	Gender	Scheme Code
2					Bloggs	Joe	09/05/73	MF	05340
3									
4	Click here for help: After viewing the help please delete this row before adding candidate details								
5									
6									
7									

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## 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.

### Upload confirmation



### 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 1 rows have been selected from a total of 1 rows uploaded in your spreadsheet.

Add a row

Click on drop-downs to view the full size. Click again to select an option.

OCR candidate number	ULN	UCI	Centre candidate number	Surname	Forename	Date of birth	Gender	Scheme code	Unit no 1	Unit no 2	Unit no 3	
1				Bloggs	Joe	09/09/1973	<span style="background-color: red; color: white;">M</span>	05340				<span style="color: red;">!</span> <b>Remember</b>

The gender is mandatory and must be either M or F.



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## Using the web-based form

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

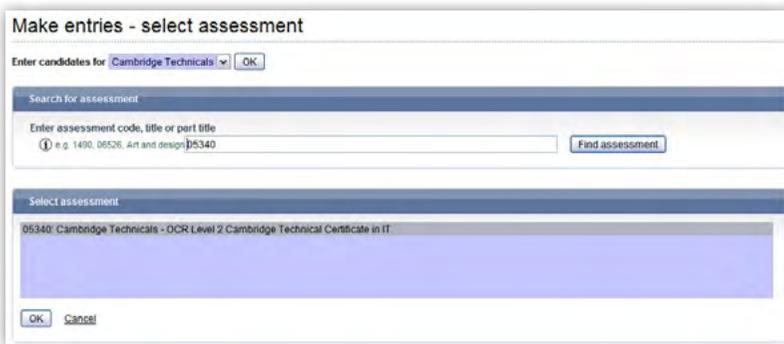
### Select assessment

Click on 'Use Cambridge Technicals web-based entry form'. You will be asked to select your assessment.

**Note:** You can find your assessment by searching for the assessment code, title or part title. If you leave the search box blank, all the Cambridge Technicals qualifications for which you are approved will appear in the 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. These candidates 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

You will then be asked to select your entry options for each candidate. You can choose to make either a full award entry or unit entries. If you're making unit entries, you can make up to three unit entries at once.

Select the entry option you need by clicking in the relevant radio button (either 'Full award entry' or 'Unit entry'). Next, tick the boxes next to the candidates you want to enter for your chosen option and click on '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'.

**Note:** Candidates should be entered for a full award if they are intending to complete the whole qualification rather than just individual units. Full award entry will allow you to make top-up entries.

### Select entry options

05340: Cambridge Technicals - OCR Level 2 Cambridge Technical Certificate in IT

Please specify entry details for these candidates

Please select the type of entry for these candidates

Full award entry

Unit entry    Enter up to 3 unit numbers at a time

<input type="checkbox"/>	Cand. no.	Name	Date of birth	Entry details	
<input type="checkbox"/>				Full award	Remove
<input type="checkbox"/>				Full award	Remove
<input type="checkbox"/>				Full award	Remove
<input type="checkbox"/>				Not yet specified	Remove
<input type="checkbox"/>				Not yet specified	Remove

## 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 Cambridge Technicals entries.

You will then see a confirmation page where you can download a copy of your entries for your records.

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## Submit your entries

Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation [Change entry options](#) [Add more candidates](#) [Exit and cancel entry](#)

### Make entries - entry summary

05340: Cambridge Technicals - OCR Level 2 Cambridge Technical Certificate in IT

**Candidates entries (5)**

Please review and submit the entries to complete

Cand No.	Name	UCI	ULN	Date of birth	Entry details	
05340-001	John Doe			01/01/2000	Full award	<a href="#">Remove</a>
05340-002	Jane Smith			02/02/2001	Full award	<a href="#">Remove</a>
05340-003	Mike Brown			03/03/2002	Full award	<a href="#">Remove</a>
05340-004	Emily White			04/04/2003	Unit 1	<a href="#">Remove</a>
05340-005	David Black			05/05/2004	Unit 1	<a href="#">Remove</a>

Order number / reference:  [Submit entries](#)

ⓘ Please note that one order number can be assigned to multiple entries. This number will be quoted on your invoice.

## Entry confirmation

Select assessment > Select candidates > Entry options > Entry summary > Entry confirmation [Return to homepage](#)

### Make entries - entry confirmation

Make new entries

Make new  entries  [Go](#)

05340: Cambridge Technicals - OCR Level 2 Cambridge Technical Certificate in IT

You have successfully submitted the following entries

**Candidates entries (5)**

Cand No.	Name	UCI	ULN	Date of birth	Entry details
05340-001	John Doe			01/01/2000	Full award
05340-002	Jane Smith			02/02/2001	Full award
05340-003	Mike Brown			03/03/2002	Full award
05340-004	Emily White			04/04/2003	Unit 1
05340-005	David Black			05/05/2004	Unit 1

Order number / reference: Entry 05340



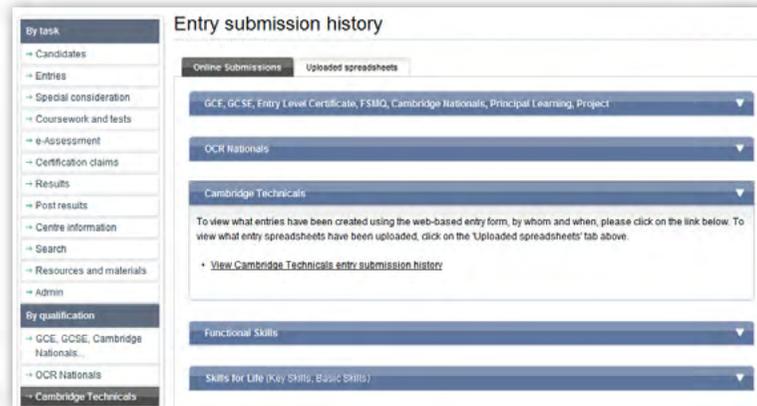
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## Viewing entries

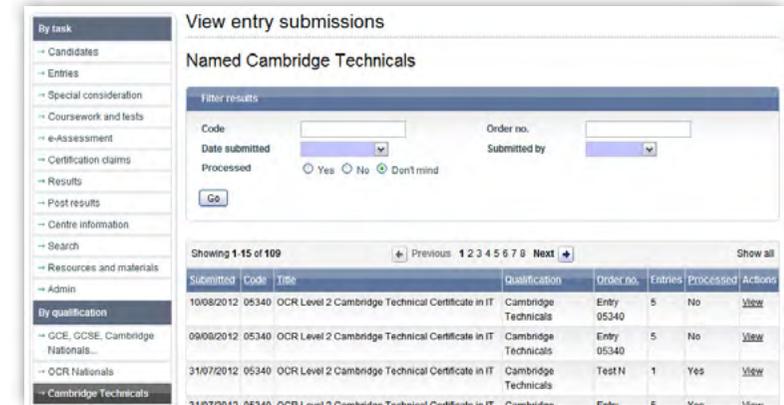
You can view all entry information within Interchange. To access this area, hover over 'Entries' in the left-hand menu and then click on 'Entry submission history'. Click on the Cambridge Technicals heading and then 'View Cambridge Technicals entry submission history'.

**Note:** It is possible to view entry information for a specific candidate group.

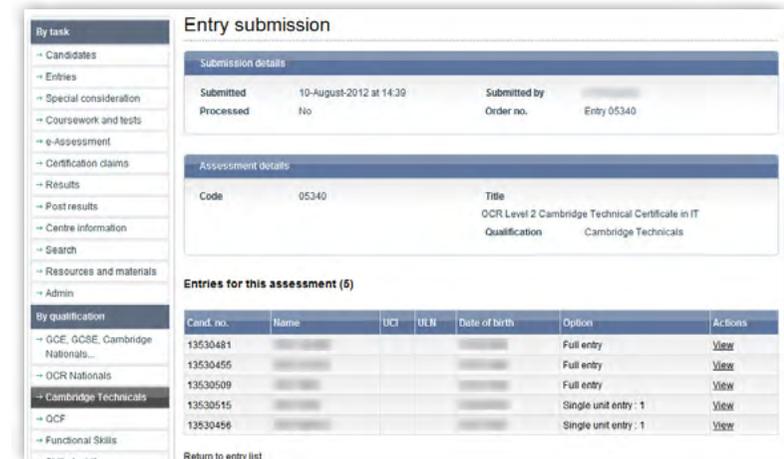
### Entry submission history



### Entry submission history (search results)



Submitted	Code	Title	Qualification	Order no.	Entries	Processed	Actions
10/08/2012	05340	OCR Level 2 Cambridge Technical Certificate in IT	Cambridge Technicals	Entry 05340	5	No	View
09/08/2012	05340	OCR Level 2 Cambridge Technical Certificate in IT	Cambridge Technicals	Entry 05340	5	No	View
31/07/2012	05340	OCR Level 2 Cambridge Technical Certificate in IT	Cambridge Technicals	Test N	1	Yes	View



Cand. no.	Name	UCI	UEN	Date of birth	Option	Actions
13530481	[redacted]	[redacted]	[redacted]	[redacted]	Full entry	View
13530455	[redacted]	[redacted]	[redacted]	[redacted]	Full entry	View
13530509	[redacted]	[redacted]	[redacted]	[redacted]	Full entry	View
13530515	[redacted]	[redacted]	[redacted]	[redacted]	Single unit entry : 1	View
13530456	[redacted]	[redacted]	[redacted]	[redacted]	Single unit entry : 1	View

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If you've submitted your entries using the spreadsheet, an 'entry status' will be visible for each entry. The status will indicate whether you need to take any action to help us process your entries successfully.

Descriptions of each of the status messages (including any action required) are given in the table below:

Status	Description	Action required?
<b>Duplicate file</b>	The spreadsheet could not be processed as it contains duplicate entries	Please call the OCR Customer Contact Centre to resolve this issue
<b>Empty file</b>	The spreadsheet does not contain any details	Please check and upload the spreadsheet again
<b>OCR handling this</b>	We are currently resolving the outstanding issues with the spreadsheet	None required
<b>Processing complete</b>	The spreadsheet has been successfully uploaded and processed	None required
<b>Processing in progress</b>	We are currently resolving any issues with the spreadsheet	None required
<b>Read and recognised</b>	The spreadsheet has been successfully uploaded and is currently being processed	None required
<b>Read and rejected</b>	The spreadsheet is incorrectly formatted or there was a problem processing the file	Please call the OCR Customer Contact Centre to resolve this issue
<b>Upload failed</b>	The spreadsheet could not be uploaded	Please check and upload the spreadsheet again

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### Making a top-up entry (moving up)

Candidates can 'top up' from one qualification to the next, eg from a Certificate to an Extended Certificate. Topping up allows candidates to complete only the additional units required to complete the next qualification in the suite. Provided that you have made a full award entry previously (**it is not possible to top up unit entries**), you simply make an entry using the appropriate top-up entry code.

A full list of entry codes and fees are provided on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)

### Making a moving down entry

Where a candidate is entered for a qualification, but is unable to complete all the units required for that qualification, the candidate can move down to a smaller qualification, provided they have achieved the right number and combinations of units for the smaller qualification (**it is not possible to do this with unit entries**), you simply make an entry using the appropriate moving down entry code.

A full list of entry codes and fees are provided on the OCR website [www.ocr.org.uk](http://www.ocr.org.uk)





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## Further support

### **OCR Customer Contact Centre**

02476 851509

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

Please quote your centre number, entry code and claim number in all communications.

