



Department
for Education

Appeals against admissions (APAD) 2014

COLLECT user guide

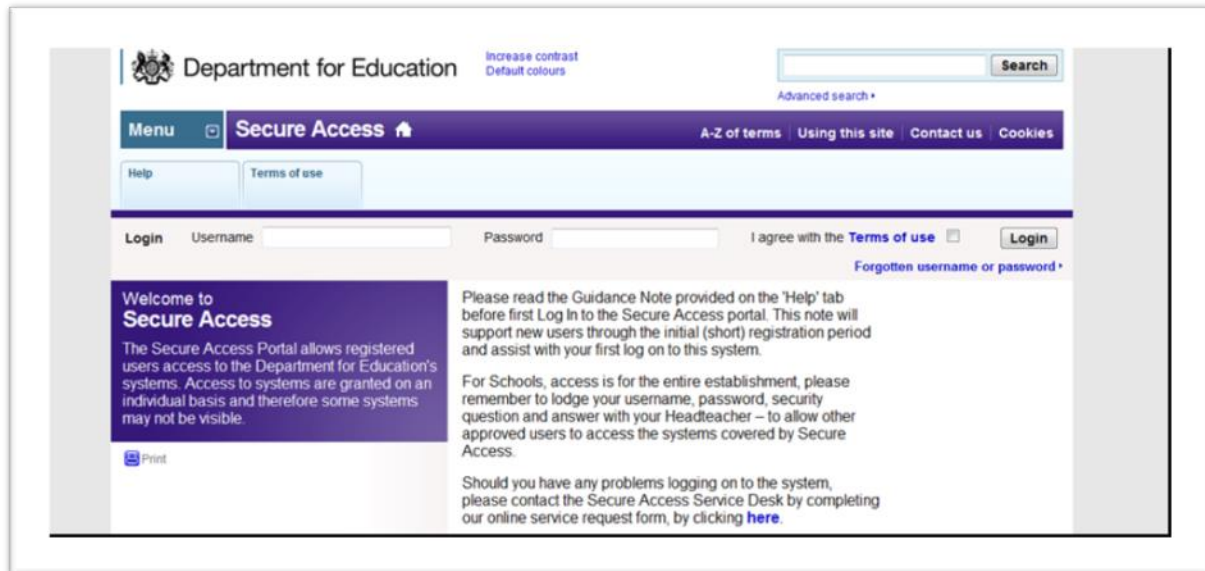
December 2013

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COLLECT and Secure Access

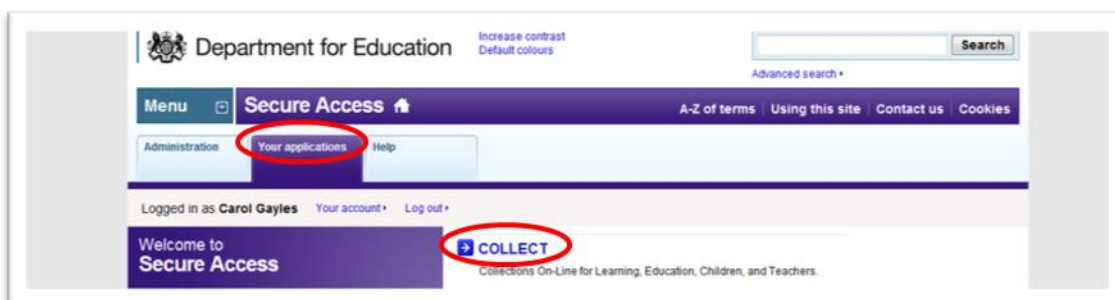
Access to COLLECT is through the department's [Secure Access system](#) (SA).



If you are a new user and require access to COLLECT, you will need to contact the approver within your local authority.

Full Secure Access guidance is published on the [Secure Access website](#).

Once successfully registered, open the 'Your applications' tab to access COLLECT, as below.



Click on 'continue'



Select the collection by clicking on the collection name to highlight it (if there is only one it will be automatically highlighted) and then click on the **Select Data Collection** button to open

Home Page

MY DATA COLLECTIONS					
Data Collection	User Role	Organisation	Status	Due Date	Days Due
APAD2014	Collector	Department for Education	Testing	07/02/2014 00:00:00	57
APAD2014	Administrator	Department for Education	Testing/Live	07/02/2014 00:00:00	57
APAD2014	Source	Darlington	Testing	07/02/2014 00:00:00	57
APEX2014	Source	Darlington	Testing	10/02/2014 00:00:00	60
APEX2014	Collector	Department for Education	Testing	10/02/2014 00:00:00	60
APEX2014	Administrator	Department for Education	Testing/Live	10/02/2014 00:00:00	60

[Select Data Collection](#)

LA (source page) screen

The next screen (source page) provides a summary of the latest position with respect to the data collection

The screenshot displays the 'Source Page APAD2014' interface. At the top, it shows 'MY DATA RETURN' with a status of 'No_Data'. Below this, there are input fields for 'Errors : 0', 'Queries : 0', and 'OK Errors : 0'. A section titled 'What can I do with My Data Return?' lists several actions: 'Upload Return from file...', 'Add Return on screen...' (highlighted), 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...'. Each action is accompanied by a brief instruction. A section titled 'What is happening to My Data Return?' shows three columns: 'Data Return Submission' with 'Date Submitted' input, 'Data Return Approval' with 'Date Approved' input, and 'Data Return Authorisation' with 'Date Authorised' input. At the bottom, there is a 'I need some help' section with a link to the help page.

The different status of data is as follows:

No Data	the return has not been added to the system.
Loaded and Validated	A data return has been added and validated but not yet submitted.
Submitted	the return has been submitted by the LA.
Amended by Source	the return has been amended by the LA (source).
Authorised	the return has been checked and authorised by the Collector (DfE).

Status is followed by a series of buttons as listed below:

Upload return form	this function will not be available for Parental Responsibility as user can only add data on screen
Add Return on Screen	allows the source to type the return on screen –this return should be added on screen.
Open Return	This option is unavailable until data has been entered and is used to access the data for editing or viewing.
Submit Return	This option is unavailable until the data has been entered and is used to submit the data to the DfE – this should only be done when the data is complete and clean. Control then passes to the DfE.
Export to File	This is unavailable until the data has been entered and is used to export the data either as a single XML file or a CSV file.

Launch Reports

Delete Return

There are no reports available for this data collection

This option is only available when data has been entered and is used to delete the LA data from the system.

Adding a Return

To add a return, the user must click the 'Add Return on screen' button.

Source Page APAD2014

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

<input type="button" value="Upload Return from file..."/>	Press this button to Import a file into your data return
<input type="button" value="Add Return on screen..."/>	Press this button to Add a new return using a web form
<input type="button" value="Open Return..."/>	Press this button to Open your data return
<input type="button" value="Submit Return..."/>	Press this button to Submit your completed data return
<input type="button" value="Export to file..."/>	Press this button to Export your data return to a file
<input type="button" value="Launch Reports..."/>	Press this button to Report on your data return
<input type="button" value="Delete Return..."/>	Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission Date Submitted <input type="text"/>	Data Return Approval Date Approved <input type="text"/>	Data Return Authorisation Date Authorised <input type="text"/>
--	---	--

The next screen to appear is the APAD return form, as shown.

First click on 'save'

APAD

Add new record ?

APAD - Darlington

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields)	Validation Results			Notes
	Errors	Queries	OK	
	0	0	0	

On clicking on 'Save' your LA number and Name will be automatically pre-populated.

Navigating through the screens

The first screen of the APAD return is their return details.

APAD

APAD - Darlington

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields)		Validation Results			Notes	
		Errors	Queries	OK		
		0	0	0		
Data Item Name	Data Item Value	Errors	Queries	OK	Notes	History
LA Number	841 - DARLINGTON	0	0	0		
Section 1: Community and controlled primary schools (including middle deemed primary)						
1. Total number of appeals lodged by parents		1	0	0		
2. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
3. Number of appeals heard by an appeals panel		1	0	0		
4: Number of appeals heard:						
4a. Number of appeals decided in parents favour		1	0	0		
4b. Number of appeals rejected		1	0	0		
Section 2: Infant classes in Community and controlled primary schools (sub-section of figures provided in Section 1 - infant classes should be included in both sections 1 and 2)						
5. Total number of appeals lodged by parents		1	0	0		
6. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
7. Number of appeals heard by an appeals panel		1	0	0		
8: Number of appeals relating to infant classes heard:						
8a. Number of appeals decided in parents favour		1	0	0		
8b. Number of appeals rejected		1	0	0		
Section 3: Community and controlled secondary schools (including middle deemed secondary)						
9. Total number of appeals lodged by parents		1	0	0		

Local intranet | Protected Mode: Off | 110%

The next screen to appear, allows the LA user to input their data.

Data Item Name	Data Item Value	Errors	Queries	OK	Notes	History
LA Number	841 - DARLINGTON	0	0	0		
Section 1: Community and controlled primary schools (including middle deemed primary)						
1. Total number of appeals lodged by parents		1	0	0		
2. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
3. Number of appeals heard by an appeals panel		1	0	0		
4. Number of appeals heard:						
4a. Number of appeals decided in parents favour		1	0	0		
4b. Number of appeals rejected		1	0	0		
Section 2: Infant classes in Community and controlled primary schools (sub-section of figures provided in Section 1 - infant classes should be included in both sections 1 and 2)						
5. Total number of appeals lodged by parents		1	0	0		
6. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
7. Number of appeals heard by an appeals panel		1	0	0		
8. Number of appeals relating to infant classes heard:						
8a. Number of appeals decided in parents favour		1	0	0		
8b. Number of appeals rejected		1	0	0		
Section 3: Community and controlled secondary schools (including middle deemed secondary)						
9. Total number of appeals lodged by parents		1	0	0		
10. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
11. Number of appeals heard by an appeals panel		1	0	0		
12. Number of appeals heard:						
12a. Number of appeals decided in parents favour		1	0	0		
12b. Number of appeals rejected		1	0	0		
Section 4: Completion Time						
13. Form Completion time (to the nearest hour)		1	0	0		
Section 5: Contact Details						
Contact Forename		1	0	0		
Contact Surname		1	0	0		
Telephone Number		0	1	0		
Email Address		0	1	0		

To enter data the user must first click on 'Edit'.

APAD		All Errors	All Notes	Add	View	Edit	Delete	Status
-APAD [20]	APAD - Darlington	RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields)			Validation Results			Notes
		Errors	Queries	OK				
		0	0	0				

Editing a Return

Clicking on the 'Edit' button, opens the value boxes, allowing the user to add and amend their data next to each questions.

The screenshot shows the APAD interface with the 'Edit' button circled in red. The interface includes a top navigation bar with buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', and 'Delete'. Below this is a table with columns for 'Data Item Name', 'Data Item Value', 'Errors', 'Queries', 'OK', 'Notes', and 'History'. The table is divided into sections: 'Section 1: Community and controlled primary schools (including middle deemed primary)', 'Section 2: Infant classes in Community and controlled primary schools (sub-section of figures provided in Section 1 - infant classes should be included in both sections 1 and 2)', and 'Section 3: Community and controlled secondary schools (including middle deemed secondary)'. The 'Errors' column shows a value of 1 for several rows, indicating validation errors.

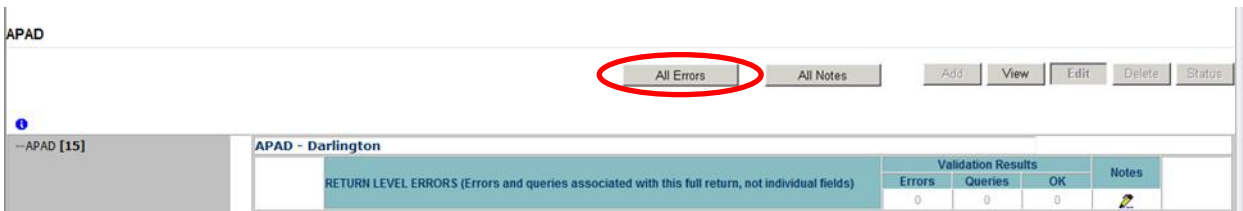
RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields)		Validation Results			Notes	
Errors	Queries	OK				
0	0	0				
Data Item Name	Data Item Value	Errors	Queries	OK	Notes	History
LA Number	841 - DARLINGTON	0	0	0		
Section 1: Community and controlled primary schools (including middle deemed primary)						
1. Total number of appeals lodged by parents		1	0	0		
2. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
3. Number of appeals heard by an appeals panel		1	0	0		
4. Number of appeals heard:						
4a. Number of appeals decided in parents favour		1	0	0		
4b. Number of appeals rejected		1	0	0		
Section 2: Infant classes in Community and controlled primary schools (sub-section of figures provided in Section 1 - infant classes should be included in both sections 1 and 2)						
5. Total number of appeals lodged by parents		1	0	0		
6. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
7. Number of appeals heard by an appeals panel		1	0	0		
8. Number of appeals relating to infant classes heard:						
8a. Number of appeals decided in parents favour		1	0	0		
8b. Number of appeals rejected		1	0	0		
Section 3: Community and controlled secondary schools (including middle deemed secondary)						
9. Total number of appeals lodged by parents		1	0	0		

Clicking on view will close the value boxes and save any data that has been added/amended.

The screenshot shows the APAD interface with the 'View' button circled in red. The interface is similar to the previous screenshot, but the 'Edit' button is no longer visible. The 'View' button is circled in red, indicating it is the next step in the process.

Viewing Errors/Queries screen

A user can view an error by clicking on the 'ALL Errors' button on the first page of the return.



A user can also access the error report by clicking in the error field next to each data value.

The screenshot displays a detailed error report for 'APAD - Darlington'. The table below shows the data items and their associated error counts. The 'Errors' column contains red boxes with the number '1' next to items 5 through 12a.

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields)		Validation Results			Notes	
		Errors	Queries	OK		
		0	0	0		
Data Item Name	Data Item Value	Errors	Queries	OK	Notes	History
LA Number	841 - DARLINGTON	0	0	0		
Section 1: Community and controlled primary schools (including middle deemed primary)						
1. Total number of appeals lodged by parents	6	0	0	0		
2. Number of appeals withdrawn by parents before reaching an appeals panel	2	0	0	0		
3. Number of appeals heard by an appeals panel	4	0	0	0		
4: Number of appeals heard:						
4a. Number of appeals decided in parents favour	2	0	0	0		
4b. Number of appeals rejected	2	0	0	0		
Section 2: Infant classes in Community and controlled primary schools (sub-section of figures provided in Section 1 - infant classes should be included in both sections 1 and 2)						
5. Total number of appeals lodged by parents		1	0	0		
6. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
7. Number of appeals heard by an appeals panel		1	0	0		
8: Number of appeals relating to infant classes heard:						
8a. Number of appeals decided in parents favour		1	0	0		
8b. Number of appeals rejected		1	0	0		
Section 3: Community and controlled secondary schools (including middle deemed secondary)						
9. Total number of appeals lodged by parents		1	0	0		
10. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
11. Number of appeals heard by an appeals panel		1	0	0		
12: Number of appeals heard:						
12a. Number of appeals decided in parents favour		1	0	0		

Once a user has clicked on either 'All Errors' or the data field error, they will be taken to the Blade Error Report page.

Darlington		Error report on 16/12/2013 at 11:15			Count 17		Return
Rule No.	Return Level	Error Message	Priority OK'd		Notes		
3173		Infant Classes: The total number of appeals lodged by parents (5) must be greater than or equal to 0.	Errors	Details			
3174		Infant Classes: The number of appeals withdrawn (6) must be greater than or equal to 0.	Errors	Details			
3175		Infant Classes: The number of appeals heard (7) must be greater than or equal to 0.	Errors	Details			
3176		Infant Classes: The number of appeals heard which were decided in the parents favour (8a) must be greater than or equal to 0.	Errors	Details			
3177		Infant Classes: The number of appeals rejected (8b) must be greater than or equal to 0.	Errors	Details			
3185		The total number of appeals lodged by parents (9) must be greater than or equal to 0.	Errors	Details			
3186		The number of appeals withdrawn (10) must be greater than or equal to 0.	Errors	Details			
3187		The number of appeals heard (11) must be greater than or equal to 0.	Errors	Details			
3188		The number of appeals heard which were decided in the parents favour(12a) must be greater than or equal to 0.	Errors	Details			
3189		The number of appeals rejected (12b) must be greater than or equal to 0.	Errors	Details			
Page 1 of 2						1	

Once the user has clicked the 'Details' button they will see the details appear on the right hand side of the screen, as shown below.

Darlington		Error report on 16/12/2013 at 13:06			Count 17		Return
Rule No.	Return Level	Error Message	Priority OK'd		Notes	Field	Value
3173		Infant Classes: The total number of appeals lodged by parents (5) must be greater than or equal to 0.	Errors	Details		5. Total number of appeals lodged by parents	null
3174		Infant Classes: The number of appeals withdrawn (6) must be greater than or equal to 0.	Errors	Details			
3175		Infant Classes: The number of appeals heard (7) must be greater than or equal to 0.	Errors	Details			
3176		Infant Classes: The number of appeals heard which were decided in the parents favour (8a) must be greater than or equal to 0.	Errors	Details			
3177		Infant Classes: The number of appeals rejected (8b) must be greater than or equal to 0.	Errors	Details			
3185		The total number of appeals lodged by parents (9) must be greater than or equal to 0.	Errors	Details			
3186		The number of appeals withdrawn (10) must be greater than or equal to 0.	Errors	Details			
3187		The number of appeals heard (11) must be greater than or equal to 0.	Errors	Details			
3188		The number of appeals heard which were decided in the parents favour(12a) must be greater than or equal to 0.	Errors	Details			
3189		The number of appeals rejected (12b) must be greater than or equal to 0.	Errors	Details			
Page 1 of 2						1	2

The user can then navigate to an error by clicking the 'Value' of an error on the right hand side of the screen (which is 'null' in this case).


Once the user has clicked this 'Value', they will be taken to the Section where that error is occurring and allow an amendment to be made.

Adding return level notes

There is a pencil icon located next to the LA number section. To add a note relating to an outstanding query, please click on the pencil.

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields)		Validation Results			Notes	
		Errors	Queries	OK		
		0	0	0		
Data Item Name	Data Item Value	Errors	Queries	OK	Notes	History
LA Number	841 - DARLINGTON	0	0	0		
Section 1: Community and controlled primary schools (including middle deemed primary)						
1. Total number of appeals lodged by parents	6	0	0	0		
2. Number of appeals withdrawn by parents before reaching an appeals panel	2	0	0	0		
3. Number of appeals heard by an appeals panel	4	0	0	0		
4. Number of appeals heard:						
4a. Number of appeals decided in parents favour	2	0	0	0		
4b. Number of appeals rejected	2	0	0	0		
Section 2: Infant classes in Community and controlled primary schools (sub-section of figures provided in Section 1 - infant classes should be included in both sections 1 and 2)						
5. Total number of appeals lodged by parents		1	0	0		
6. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
7. Number of appeals heard by an appeals panel		1	0	0		
8. Number of appeals relating to infant classes heard:						
8a. Number of appeals decided in parents favour		1	0	0		
8b. Number of appeals rejected		1	0	0		
Section 3: Community and controlled secondary schools (including middle deemed secondary)						
9. Total number of appeals lodged by parents		1	0	0		
10. Number of appeals withdrawn by parents before reaching an appeals panel		1	0	0		
11. Number of appeals heard by an appeals panel		1	0	0		
12. Number of appeals heard:						
12a. Number of appeals decided in parents favour		1	0	0		
12b. Number of appeals rejected		1	0	0		
Section 4: Completion Time						
13. Form Completion time (to the nearest hour)		1	0	0		

You will then be presented with the Note Page screen below:



Department for Education

[Back to MyCOLLECT page](#)

You are logged in as CGayles | [Log out](#)

BLADE UAT COLLECT Portal

Note Page

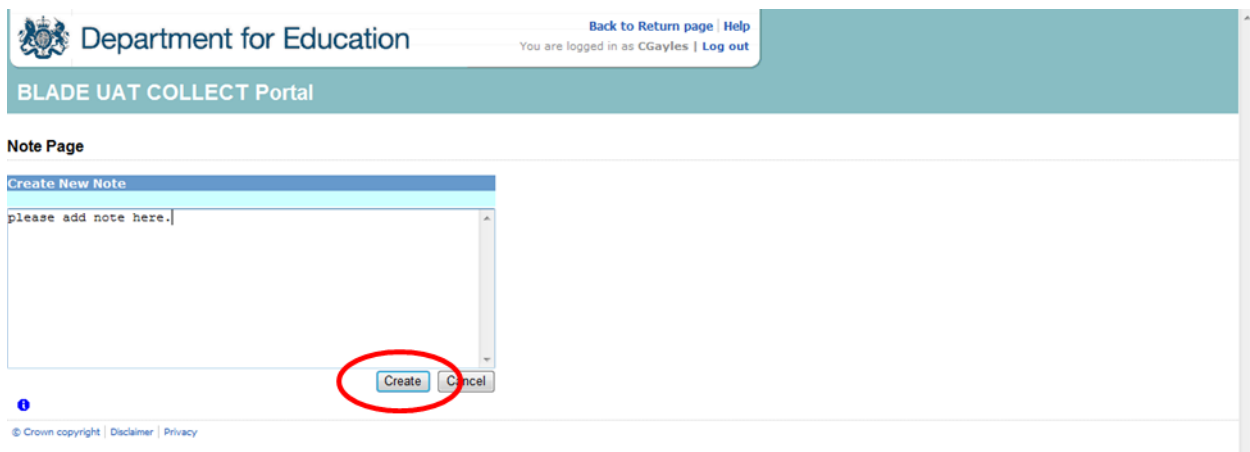
Notes - ParentalResponsibilityM-A2013 Back

Data Item: LA

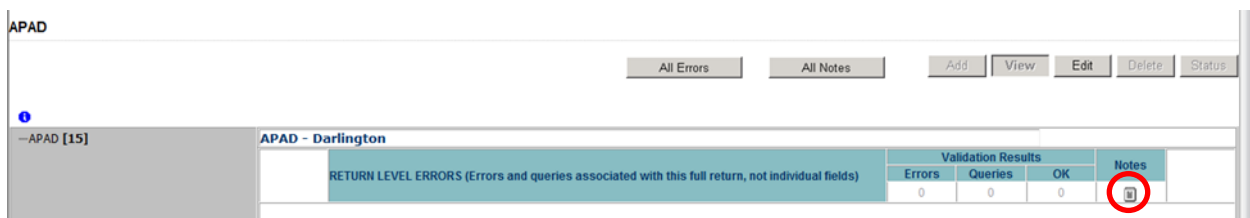
User	Role	Organisation	Native ID	Date and Time	
					<input type="button" value="Add New Note"/> <input type="button" value="Remove Note"/>

Note Detail

The user will need to click on 'Add New Note' to enable them to type in the note detail box.



oO

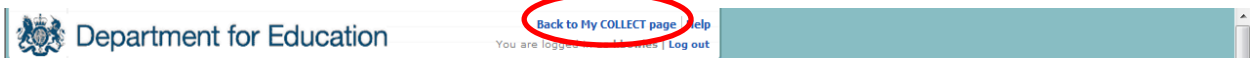


Once a note has been added, click on Create. This will then save that note against the return. The pencil icon will then change to a notepad icon, which indicates a note has been added.

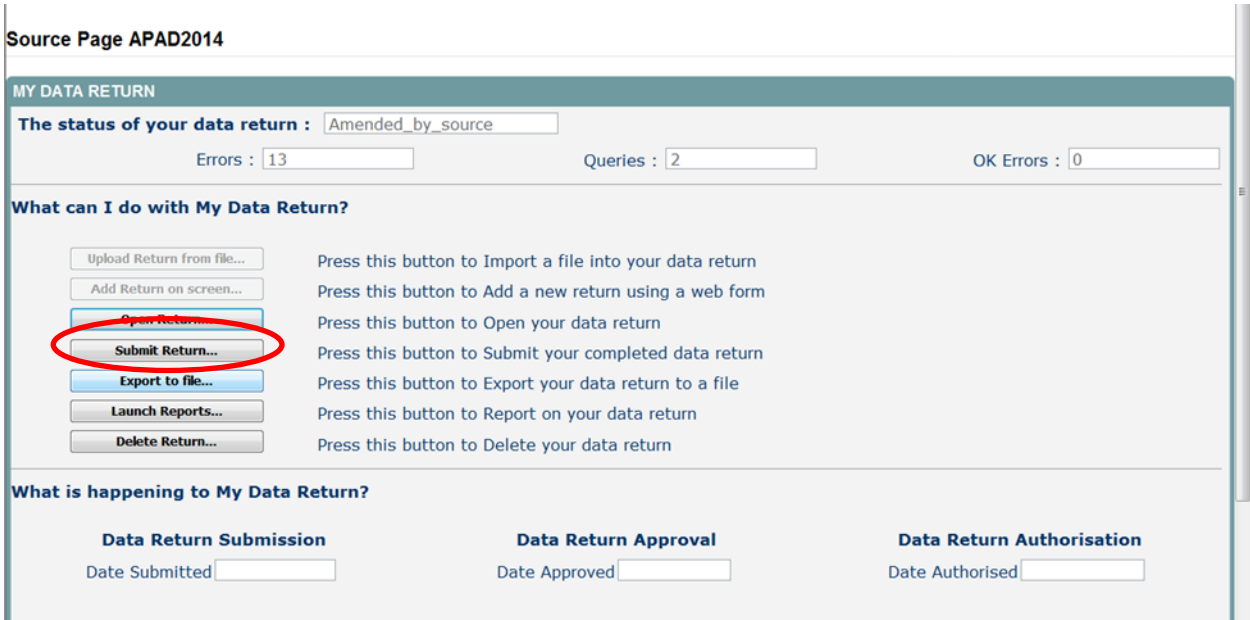
Please Note: All errors must be resolved. Return level notes added against outstanding queries will be reviewed by the Department on submission of the return by the Local Authority.

Submitting a return

Once the LA user is happy for their return to be submitted for DfE access the procedure is very straightforward. First return to the 'Source Page' by clicking on 'Back to my COLLECT page' located at the top of the form.



Then select Submit Return.



Deleting a return

If a LA User wants to delete a full return, they can do so by clicking 'Delete Return'.

Source Page APAD2014

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

<input type="button" value="Upload Return from file..."/>	Press this button to Import a file into your data return
<input type="button" value="Add Return on screen..."/>	Press this button to Add a new return using a web form
<input type="button" value="Open Return..."/>	Press this button to Open your data return
<input type="button" value="Submit Return..."/>	Press this button to Submit your completed data return
<input type="button" value="Export to file..."/>	Press this button to Export your data return to a file
<input type="button" value="Launch Reports..."/>	Press this button to Report on your data return
<input type="button" value="Delete Return..."/>	Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission Date Submitted <input type="text"/>	Data Return Approval Date Approved <input type="text"/>	Data Return Authorisation Date Authorised <input type="text"/>
--	---	--

The status of the data return will revert back to 'No Data' and the LA user will need to click on 'Add return on screen' to re-enter their data.

Exporting a return

COLLECT provides options to export data in CSV or XML format. Exporting data can be performed by clicking on the 'Export to file' button

Source Page APAD2014

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

<input type="button" value="Upload Return from file..."/>	Press this button to Import a file into your data return
<input type="button" value="Add Return on screen..."/>	Press this button to Add a new return using a web form
<input type="button" value="Open Return..."/>	Press this button to Open your data return
<input type="button" value="Submit Return..."/>	Press this button to Submit your completed data return
<input type="button" value="Export to file..."/>	Press this button to Export your data return to a file
<input type="button" value="Launch Report..."/>	Press this button to Report on your data return
<input type="button" value="Delete Return..."/>	Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

Once the user has clicked 'Export to File' button, they will be taken to the Export Report Format.

CHOOSE EXPORT FORMAT

Export the current data for the selected Source

Please select the format that you wish to export this data:

Export as XML

Export as CSV

Please Select the Status that you wish to export this data:
Either:

All

Or one or more of the following

Loaded and validated

Amended by source

Submitted

Amended by agent

Approved

Amended by collector

Authorised

Select the format of exported data that you require and when prompted you can either save the file to a specific location, or can open the file for viewing.

Screen Functionality

Before viewing the return it is useful to understand some of the basic controls and screen operations.



Don't use the browser buttons! When in the data collection, unpredictable behaviour may be experienced if you use the back/forward buttons on your web browser's toolbar.

Navigation through a return

To navigate through the system, links are provided on all pages either as **Back** or **Drill Up** options. Please use these links to navigate between screens when using the system

Control	Usually located	Action
Back to MyCOLLECT page	All screens within a return except the main page which shows Back to Home page	Returns you to the main page for your user role (Agent, Source etc)
Drill Up	Any data screen within a return apart from the header screen	Returns you to the previous data screen
Return	Report screens, e.g. History and errors	Returns you to the previous screen
Back	Notes screens	Returns you to the previous screen
View All	Data entry screens that have additional linked data, e.g. assessments	Takes you to the sub module level details

Mode Buttons

Those buttons determine which operation mode the data form on screen is in and which operations are available.



Dark Grey text on sunken button with light border = Active Mode

Black Text on button and highlighted border = Available Mode

Light Grey text on button with light border = Unavailable ModeHelp

COLLECT issues and data collection queries

If you are experiencing problems with COLLECT or have a data collection query, please submit a [service request form](#) to the Education Data Division Helpdesk.

Secure Access issues

Menu ☰ **Secure Access** 🏠 [A-Z of terms](#) [Using this site](#) [Contact us](#) [Cookies](#)

Administration Your applications **Help**

Logged in as **Carol Gayles** [Your account](#) [Log out](#)

About Secure Access:

The Secure Access Portal allows registered users access to the Department for Education's systems. Access to systems are granted on a user by user basis. Only those systems that a user can access will be displayed.

How to login, what details are expected:

If this is your first log in to Secure Access and you had an account for accessing COLLECT, S2S or KtS prior to 3 December, use your existing username and password. You will be required to change your password once you have logged into Secure Access. On first log in, a unique PIN is required in order to prevent un-authorised access. Schools who have not received the PIN from their respective LA will need to retrieve their PIN from Edubase (www.education.gov.uk/edubase) - all 'other' users will have received an Email containing their PIN. 'Other' users not in receipt of their PIN should contact the Secure Access Service Desk by completing an online service request form, by clicking [here](#).

As part of the 'first time' login process you'll be advised to confirm the following:

- If Organisation details have been 'imported' into the system, these will be displayed on screen and need to

If you are having problems logging into Secure Access, please refer to the 'Help' section on Secure Access. If you are still unable to resolve your issue, please submit a [service request](#) to the SA Service desk.



Department
for Education

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Any enquiries regarding this publication should be sent to the [data collections helpdesk](#).

This document is available for download from the [Department's website](#).