# Alternative Provision (AP) 2014

## COLLECT Guide

**January 2014**

# Contents

# COLLECT and Secure Access

Access to COLLECT is now through the Department's Secure Access System (SA).
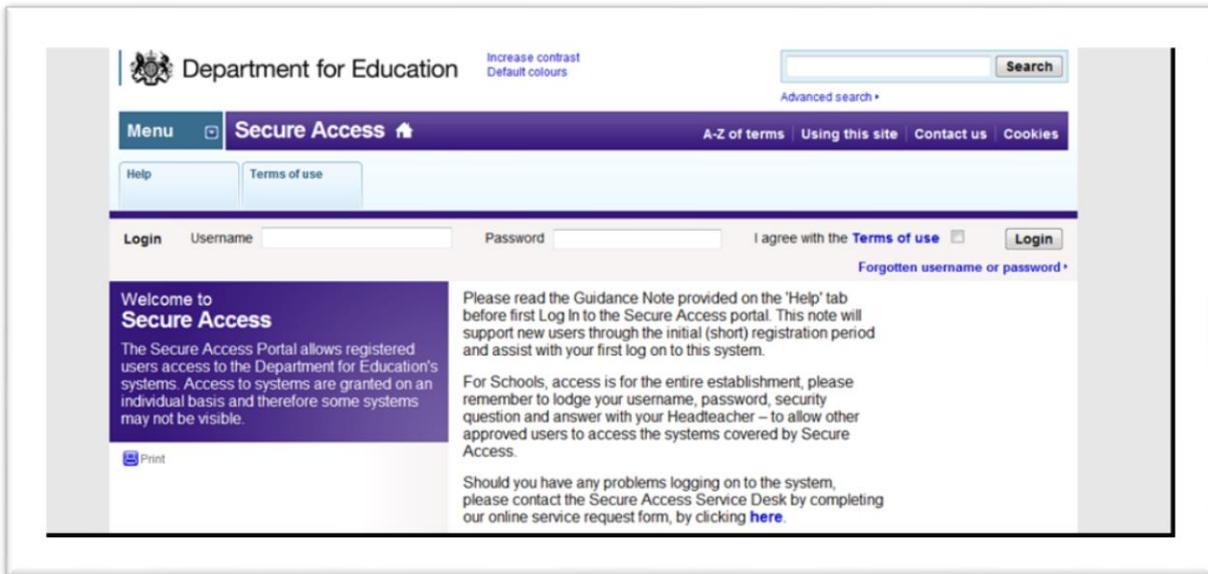


If you are a new user and require access to COLLECT, you will need to contact your local authority.

Full Secure Access guidance is published on the Secure Access Website
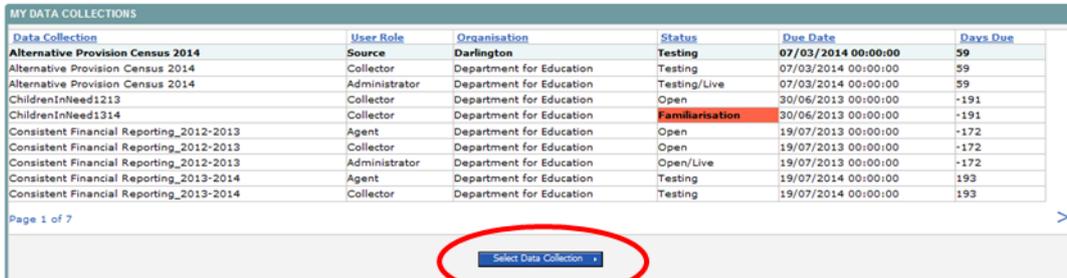


Once successfully registered, open the 'Your applications' tab to access COLLECT, as above.



Click on 'continue', as above

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.

**\*Please note: some screen shots refer to previous years however the process is the same for the 2014 collection.\***

# LA (Source Page) Screen

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



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** – allows the source to upload a return
**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 –** There are no reports available for this data collection
**Delete Return –** This option is only available when data has been entered and is used to delete the LA data from the system.

# Uploading a Return

This is where you can load your XML data files directly into the system. To do this:

Click on the 'Upload Return from file' button on the Source Page. This will display the Upload screen:
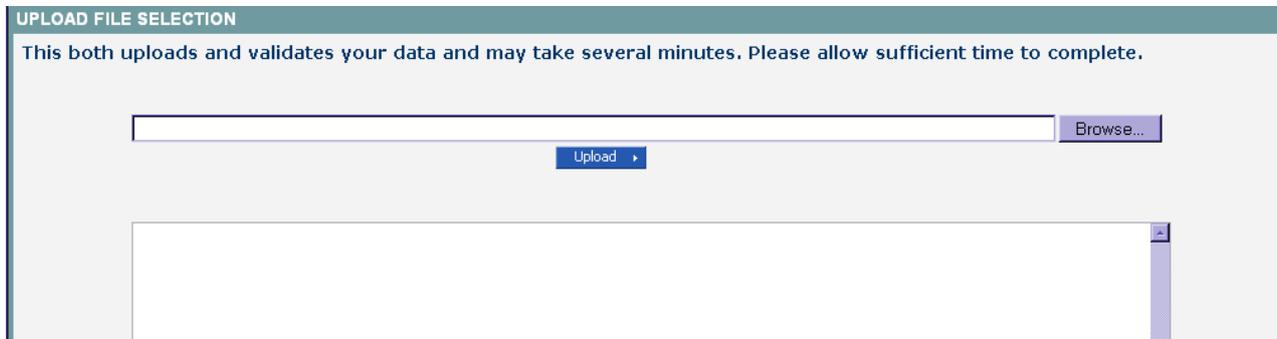


The LA can type the file path/name of the return or alternatively click on the 'Browse…' button to navigate to the required file.

Once the relevant file has been selected the 'Upload' button should be clicked to save the data into COLLECT. If an attempt is made to upload a file that does not belong to the LA the following error message will be displayed:

*"The file you are attempting to upload is not for the selected Source Organisation"*

Once the file has been successfully uploaded the return status for that AP Setting will change to Loaded.

# Adding a Return

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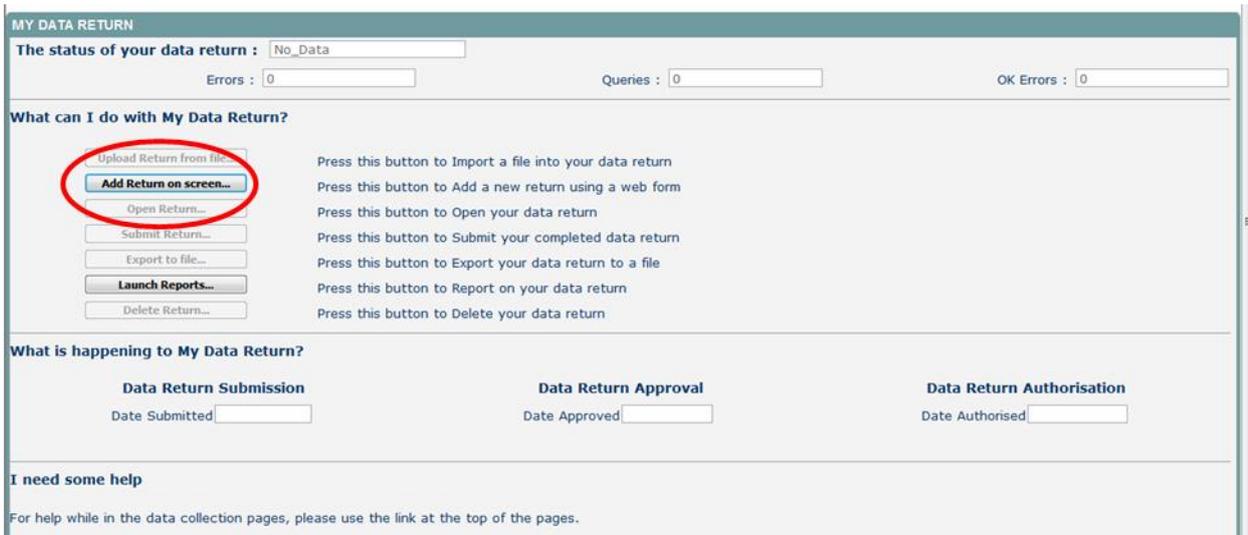


By clicking on the 'Add a Return' button from the Source Page, you are presented with the option to manually add data, simply fill in the fields and use the dropdown lists to add data whilst referring to the specification as defined in the guide.

Once you have completed the data on this page, click the 'Save' button. You can now navigate to the other screens using the 'View All' button at the bottom of the data area.

Clicking here allows you to add, edit and delete AP Pupils or the CBDS Levels for this setting.



The user has drilled down to the AP pupils data. Here you can add, delete or edit pupil data.

To add data:

Click on the 'Add' button to add a new record. Once you've filled in the first page, click on 'Save'. You can now complete the rest of the pupil's data by clicking on the 'Edit' button.

To delete data:

Highlight the particular pupil that you wish to delete in the selection area (A), then click on the 'Delete' button. Click 'Yes' to confirm the deletion. The pupil is now removed from the list.

To add Free School Meals (FSM) data:

Highlight the particular pupil in selection area A and click on Pupil Characteristics/SEN/ Attendance. The FSM section appears at the bottom of the screen.



To make additions/amendments use the 'click to Edit/View' button, then the add button.

This shows the pupil is in receipt of FSM.

**AP Pupils - Characteristics - Darlington**

AP Pupils [2330]
- > Characteristics
- > Home Information
- > Identifiers
- FSM Period

| Filter By: | Unique Pupil Number | | Surname | | Date of Birth | | Reset | Go |
|---|---|---|---|---|---|---|---|---|

| Unique Pupil Number | Surname | Date of Birth | Rule Errors |
|---|---|---|---|
| A | A 0304IND | 2001-09-01 | 4 |
| ABCDE64294056 | Brown | 2007-09-01 | 3 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |
| A | A 0304IND | 2001-09-01 | 4 |

Page 1 of 59 (Records:582)

| Pupil Characteristics/SEN/Attendance | | Pupil Identifiers ⚠ | | Home Information | | | |
|---|---|---|---|---|---|---|---|

| DATA ITEM | VALUE | Errors | Queries | OK | Notes | Histo |
|---|---|---|---|---|---|---|
| **PUPIL CHARACTERISTICS / SEN / ATTENDANCE** | | | | | | |
| Ethnic Code | WCOR: White - Cornish | 0 | 0 | 0 | ✏ | |
| Service Child | | 1 | 0 | 0 | ✏ | |
| Type of Alternative Provision | NMS - Non-maintained Special School | 0 | 0 | 0 | ✏ | |
| SEN Provision | A - School Action or Early Years Action | 0 | 0 | 0 | ✏ | |
| **FSM Eligibility Details** | | | | | Click To Edit/View | |

| FSM Start Date | FSM End Date | UK Country | |
|---|---|---|---|
| 2012-09-20 | 2012-12-19 | England | |
| | | | 1 |

This shows the pupil was in receipt of FSM from 29/9/2012 to 19/12/2012.

# LA Return screen

By clicking on the 'Open Return' button, you are taken to the following screen that contains the data either manually typed or already loaded into Collect:



You can now navigate around the data using the 'View All' links at the bottom of the page.

Click on the 'Viewing a Return' section of this document for an explanation on how to fully navigate the data.

# Editing a Return

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



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

# Viewing Errors/Queries screen

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



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



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.



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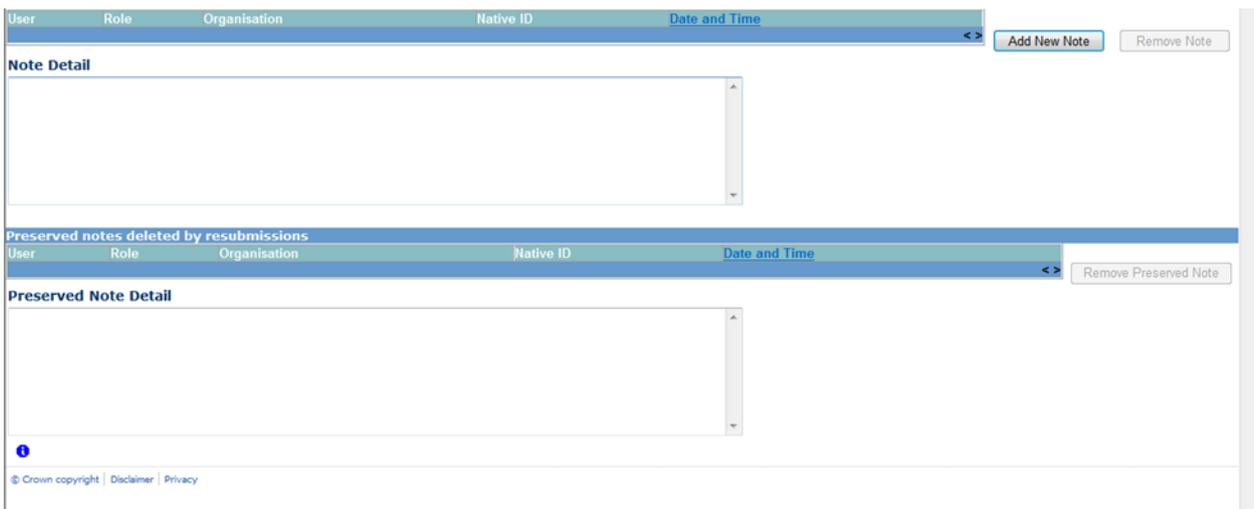
Once the user has clicked this 'Value', they will be taken to the Section where that error is occurring and allow an amendment to be made.
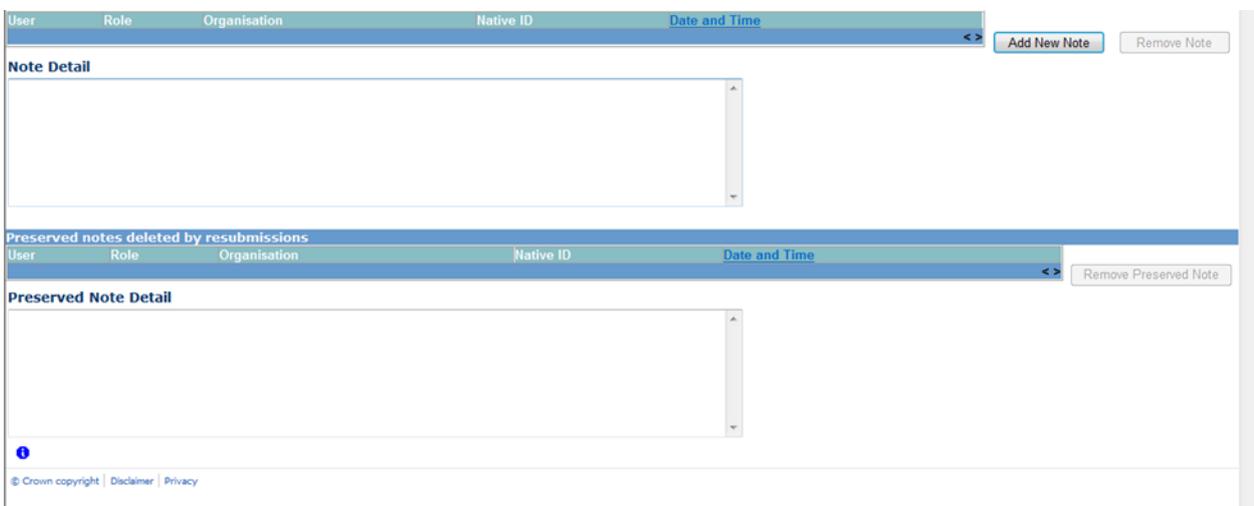
# Adding return level notes

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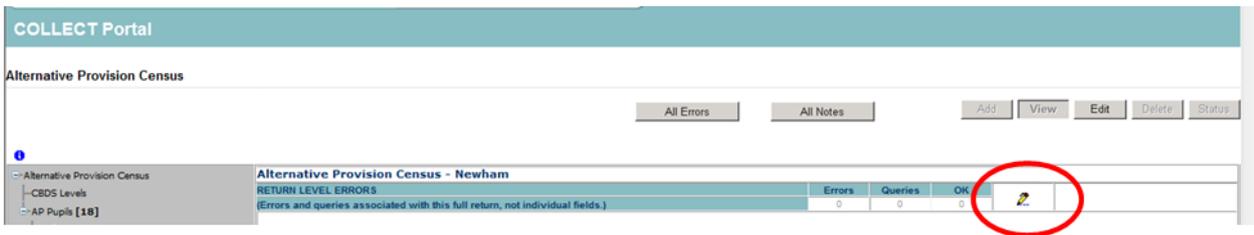


You will then be presented with the Note Page screen below:



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

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.
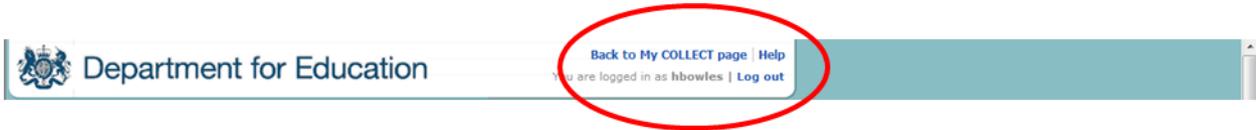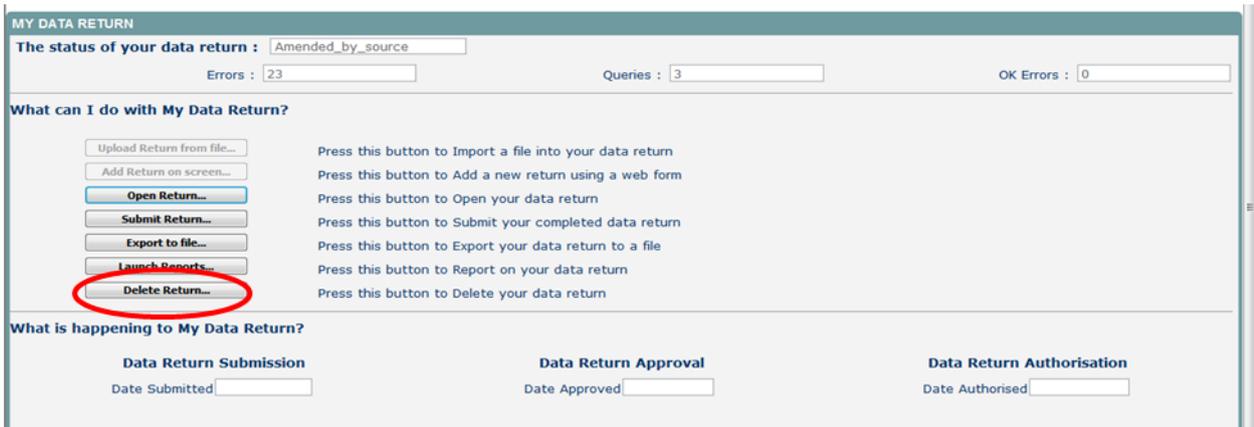


Then select Submit Return.
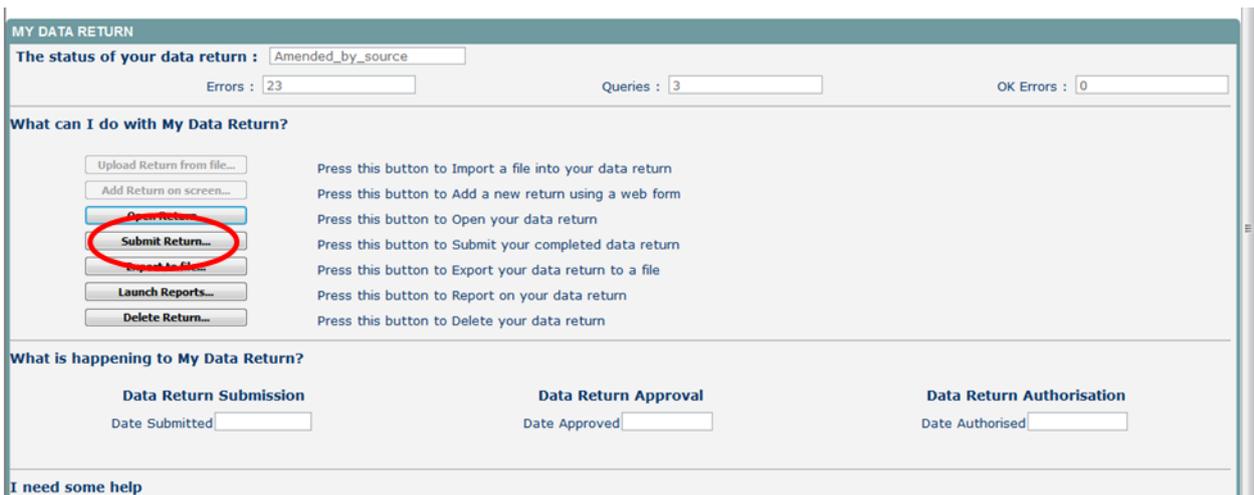
# Deleting a return

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



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.

# Launching Reports

Click on the 'Launch Reports' from the My Source page to view the available reports.

The AP Duplicate Record, AP Funding, AP Funding - Pupil Premium_FSM and AP Funding Report for Service Child Pupil Premium are all available in this census.



Click on the 'Launch Report' button to go to the report selection page, by highlighting the one you require. The instructions are very similar for both reports – we have provided examples for Duplicate Records.



There are two options that you can select from the Check for Duplicates dropdown box.

Within Authority - runs the report to check whether there are duplicate pupils in your data that may need further

Across All Authorities' - runs the report to check whether there are duplicate pupils in your Authority and in with other LAs.

Click on the 'Launch Report' button to run the report. This may take a while to run depending upon the amount of data.

From here, you can navigate the pages, export the data in various formats or print out the report.



Once you have finished viewing the report, click on the 'Back to Reports' link at the top right hand side of the page.

From here, select the 'Back to My COLLECT Page' to return back to your 'My Source' page.

# 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



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



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.
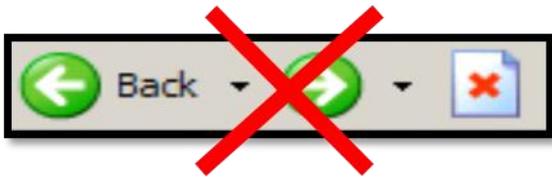


**Don't use the browser buttons!** When in the data collection, unpredictable behaviour may be experienced if you use the back/forward buttons on your web browser's toolbar.

## 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 Mode

# Left Hand Menu

The left hand menu can also be used to migrate to different screens although this may disable 'edit' functionality.

# Help

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
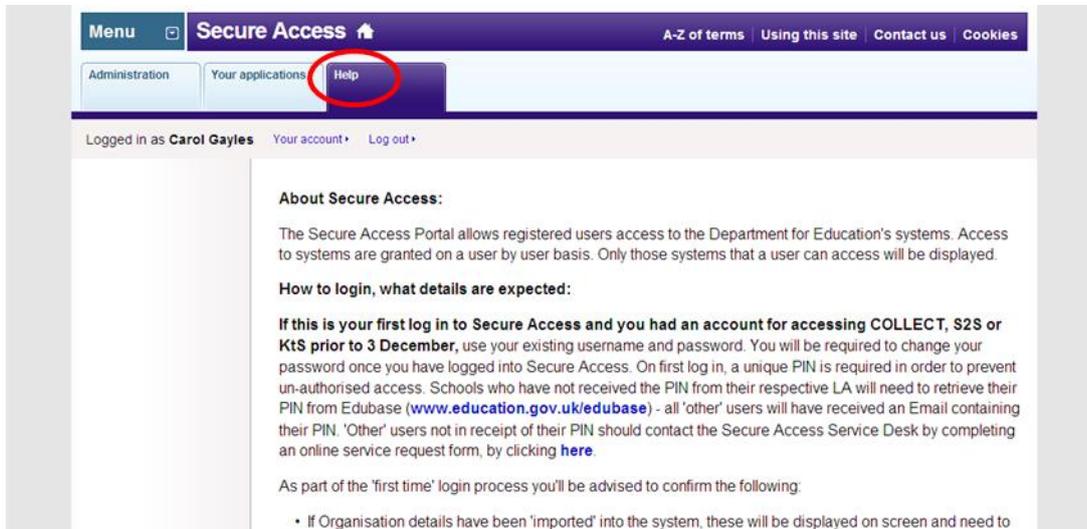


If you are having problems logging into Secure Access, please refer to the 'Help' section on Secure Access. If you are still unable to resolve your issue, please submit a service request to the SA Service desk.