



Department  
for Education

# **COLLECT user guide**

**Instructions for local authorities on how to use COLLECT to submit their key stage 1 and phonics returns for 2014**

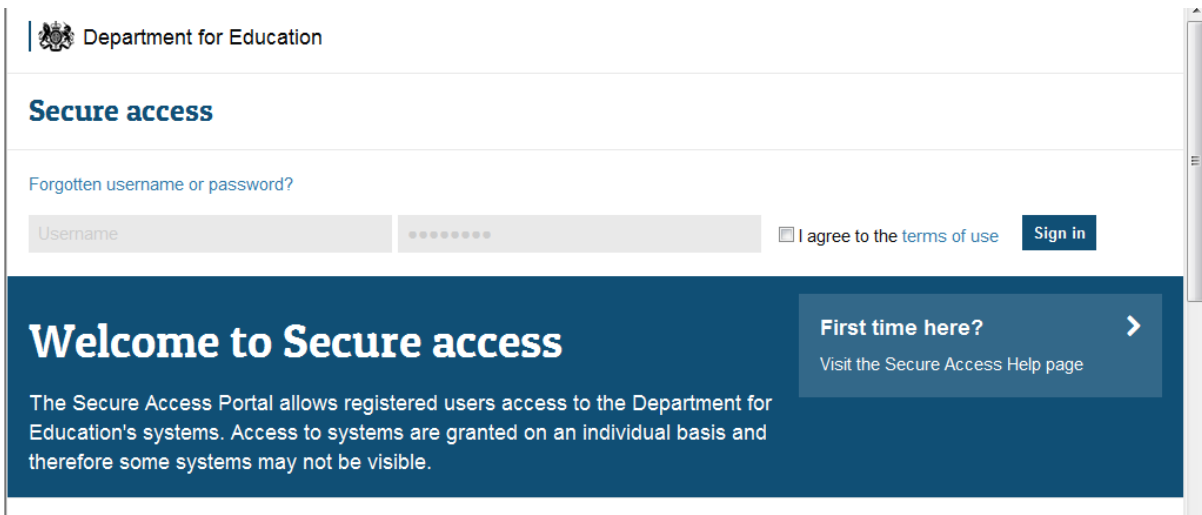
**June 2014**

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# COLLECT and Secure Access

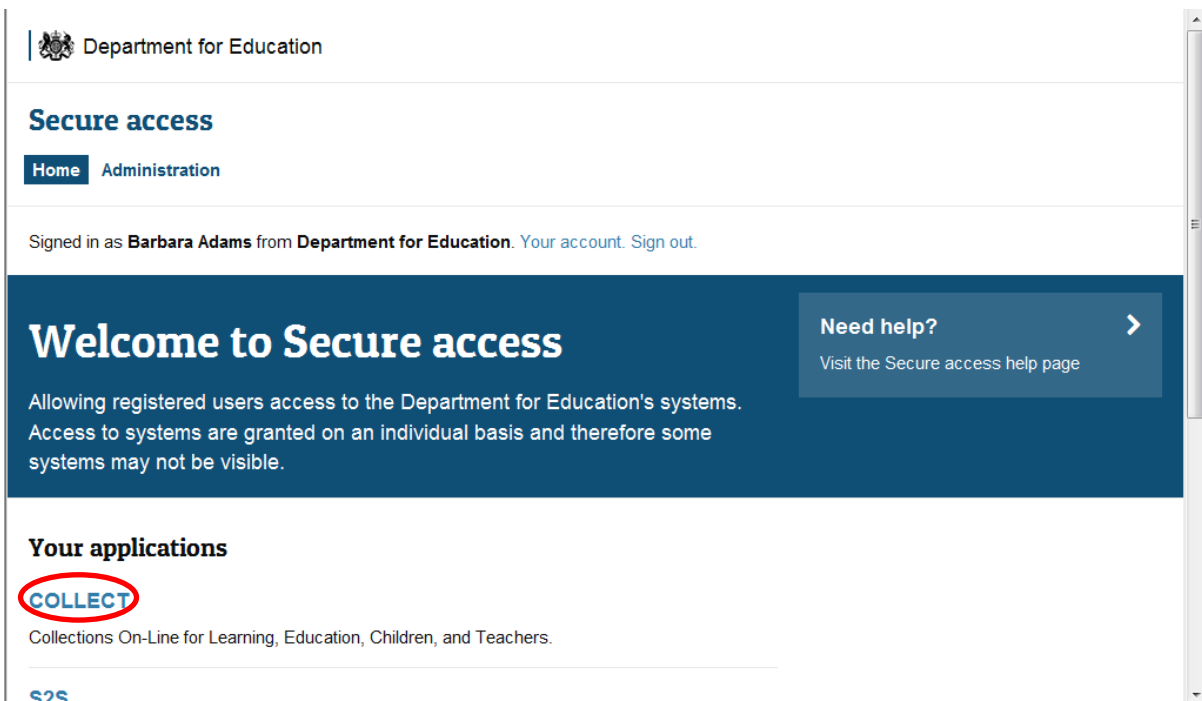


Access to COLLECT is now through the Department's [Secure Access System](#) (SA).

To access Secure Access existing users will need their COLLECT username and password.

If you have forgotten your login details, please complete a [Service Request form](#) on our website.

If you are a new user and require access to COLLECT, you will need to speak to your Approver. Full Secure Access guidance is published on the [Secure Access Website](#).

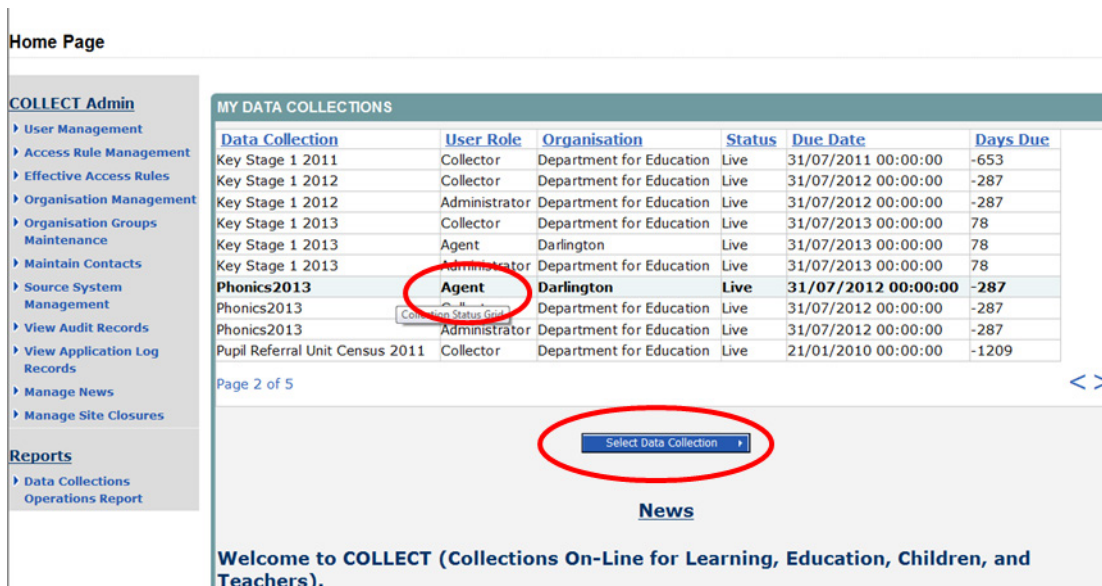


Once successfully logged in, click on the COLLECT link to access COLLECT, as above.



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 it.



The Agent (Local Authority) main screen will now be displayed listing all the schools for your LA.

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
101	100	1	0	0	1	0	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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Dan

The Agent screen comprises four main sections:

- Filter by
- Performance Summary
- Sources
- Agent Functions

## Filter By

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue

This section allows you to limit the number of schools displayed in the source section of the screen. It can be used to display a single school or a group of schools that have the same characteristics.

For example by entering an estab number in the 'Native ID' and selecting the 'Go' button then only the school with that estab will appear on the screen. This saves the user having to go through numerous screens to get to the particular school return they want to work on.

The user can only change the sort order by clicking on one of the headers with a blue text. For example by clicking on the 'Source Name' header all the schools in the LA

return will be sorted in ascending School Name order, click again and they will be sorted in descending School Name order.

## Performance Summary

Performance summary						Errors		
Expected	Outstanding	Submitted	Approved	Authorised	E	Q	OK	
2533	2530	3	0	0	75	51	0	

This area of the screen shows a breakdown of the status of the returns for the authority's schools that are part of the collection.

It shows

- The total number of schools that a return is expected from;
- The total number of schools who have yet to submit their return;
- The total number of schools who have submitted their return;
- The total number of school returns approved by the Local authority;
- The total number of school returns authorised by the DfE;
- The total number of errors across all returns, sorted by error severity.

This section is refreshed any time a change is made to the underlying data e.g. when the status of a school return has changed from 'Submitted' to 'Approved', the approved total will be incremented by 1, while the submitted total will decrease by 1.

## Sources

Sources							Errors		
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	22/11/2012			Academies	23	14	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
8946906	Abraham Darby Academy	No_Data				Academies	0	0	0
3594001	Abraham Guest Academy	No_Data				Academies	0	0	0
3946905	Academy 360	No_Data				Academies	0	0	0

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This section lists all of the data sources for whom a data return is expected for the collection (unless a filter has been applied).

# Agent Functions



This section contains the functions that an Agent (LA) can use to manage the returns it is responsible for.



## Uploading single XML files

As you are loading your data on behalf of your schools, please follow the instructions below.

The school file must be suffixed with .XML but can be named anything. Usually this can be extracted from the Management Information System (MIS) or for some collections a spreadsheet or XML convertor is provided by the Department.

You may upload your schools files in two ways: individually or multiply in a zipped file

## Individual upload of XML files

First, highlight the school in the list of schools on the Main Agent screen. Then Click on the 'Upload return for selected source...' button in the Return Management section.

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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Buttons: Open Return..., Approve..., Approve All..., Unapprove..., Reject..., Delete..., Export Selected..., Export Multiple..., Export All...

Buttons: Upload Return for selected Source..., Upload Multiple Returns (zip file)..., Agent Administration...

## Uploading Multiple XMLs (in a zipped file)

LAs have the option to upload multiple returns in one zipped file. Each return within the .ZIP file should be a separate .xml file.

From the main screen below, select the 'Upload Multiple Returns (zip file)' button. The next screen is the same as uploading a single return. Just select the appropriate zipped file from the browser then select the 'Upload Multiple Returns (zip file)...' button. All the files will be uploaded and their status set to submitted.

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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The upload screen will be displayed:

**ZIP FILE SELECTION**

Click on the Browse button below to locate your zip file containing the return files to upload then click on the Upload button to begin the process. You will be taken to a results page on completion to view the upload result for each file contained in the zip file.

Please note that re-submitting existing Data Returns will delete all notes other than return-level notes. If you wish to preserve any data-item or validation error level notes you must enter them as return-level notes before re-submitting the Data Returns.

Use the browse button to locate the file you wish to upload. Highlight the file name and click on Open to select it. Then click on the Upload button to load the file.

**ZIP FILE SELECTION**

Click on the Browse button below to locate your zip file containing the return files to upload then click on the Upload button to begin the process. You will be taken to a results page on completion to view the upload result for each file contained in the zip file.

Please note that re-submitting existing Data Returns will delete all notes other than return-level notes. If you wish to preserve any data-item or validation error level notes you must enter them as return-level notes before re-submitting the Data Returns.

f:\\_Desktop\PhonicsTestFile\_001\_Pass.xml

A progress message will be displayed while the upload is taking place.

**FILE UPLOAD PROGRESS ...**

Data return upload in progress, please wait....

Deleting existing data return

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Once the upload has completed, the source main page will be re-displayed and the return status section will updated to “Submitted” for the school/s you have loaded. The total number of ‘outstanding’ and ‘submitted’ returns for your LA will also be updated.

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
101	100	1	0	0	1	0	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
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8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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Please Note - There are more highlighted buttons available after a return has been loaded.

The return status will change depending on whether the school or LA has loaded/edited the return:

- No Data – the return has not been loaded into the system.
- Import in Progress – A return is currently being loaded for the source.
- Waiting for Validation – The return is currently in a queue and is waiting to be validated by COLLECT.
- Validation in Progress – the system is currently running validation checks against your return. The system will usually run validation checks on loading of the return or after data within the return has been changed.
- Submitted – the return has been submitted by the Source.
- Rejected by Agent – the return has been rejected by the Local Authority. A return is only rejected if there is a fundamental issue with it e.g. a data return for the wrong year has been loaded.
- Amended by Agent – the return has been submitted by the Source and it has been amended on line by the Agent(Local Authority). A Local Authority should only amend data submitted by the Source after seeking permission from the Source to do so

- Approved – the return has been Approved by the LA after all data checks have been carried out and they are happy for the DfE to take that version as final (changes can still be made).
- Amended by Collector – the return has been approved by the Agent, then it has been amended on line by the Collector (DfE). The DfE will only amend data Approved by the Agent, after agreeing changes with the Agent or to un-authorise a return if needed.
- Rejected by Collector – the return has been rejected by the Collector(DfE).
- Authorised – the return has been checked and authorised by the Collector(DfE).

# Viewing Returns

Once you have loaded the returns you will need to go into the schools to check the data is correct and also to ensure notes have been entered against any queries or errors that can not be corrected.

To view returns, select the school you want by clicking on its name (You can search for a school using the Filter by tool bar) and click on 'Open Return'.

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
101	100	1	0	0	1	0	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
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8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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Dan ▼

## Navigating through the screens

This screen shows the 'header' information from the XML file. It also allows you to view the errors and queries associated with that return and the notes associated with that return. (Please note any errors or queries showing on the 'header' screen will only relate to the data on that screen and not the whole return).

You can use 'View All' buttons in order to navigate through the return or the Grey menu on the left hand side.

Phonics is shown as an example – the same navigation process should be followed for Keystage1 and other source level collections.

The screenshot shows the 'Phonics' screen for 'Allenton Community Primary School'. It features a navigation menu on the left with 'Phonics', 'Pupils [1]', and 'Assessments'. The main area contains a table with columns for 'Data Item', 'Value', 'Errors', 'Queries', 'OK', 'Notes', and 'History'. A 'View All' button is circled in red at the bottom right of the table.

Data Item	Value	Errors	Queries	OK	Notes	History
Collection	Y1 Phonics Transfer File	0	0	0		
Date Time	2012-06-23 15:30:47	0	0	0		
Year	2012	0	0	0		
LEA	831 - DERBY	0	0	0		
Software Code	Version 3	0	0	0		
Establishment Number	2400	0	0	0		
Pupils Overview					<a href="#">View All</a>	

The Pupils screen shows the pupils who have taken part in the Phonics Screening and allows access to the Assessments screen. To access these screens just select the relevant pupil and click 'View All' or navigate using the grey menu.

Errors will be displayed in red in the 'E' column; queries will be displayed in red in the 'Q' column.

The screenshot shows the 'Pupils' screen for 'Allenton Community Primary School'. It features a navigation menu on the left with 'Phonics', 'Pupils [1]', and 'Assessments'. The main area contains a table with columns for 'UPN', 'Surname', 'Forename', 'DOB', 'Mark', 'Outcome', and 'Rule Errors'. A red circle highlights the 'Errors' column in the table below, which shows a red '1' in the first row. A 'View All' button is circled in red at the bottom right of the table.

UPN	Surname	Forename	DOB	Mark	Outcome	Rule Errors
A123456789012	Child1	Child1	2006-02-02	39	Wa	1

Data Item	Value	Errors	Queries	OK	Notes	History
UPN	A123456789012	1	0	0		
Surname	Child1	0	0	0		
Forename	Child1	0	0	0		
Date of Birth	2006-02-02	0	0	0		
Gender	M - Male	0	0	0		
Assessments Overview					<a href="#">View All</a>	

# Assessments

**Assessments**

**Assessments - Allenton Community Primary School**

Subject	Method	Component	Result Qualifier	Result	Rule Errors
PHO	TT	CHK	NY	Wa	0
PHO	TT	CHK	NM	39	0

**1**

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
Subject	PHO	0	0	0		
Method	TT	0	0	0		
Component	CHK	0	0	0		
Result Qualifier	NY	0	0	0		
Result	Wa	0	0	0		

## Viewing the Query/Errors Screen

You will need to try and correct any errors on your return and enter notes against queries.

To view errors and queries on the return please select the 'All Errors' button and a screen will be displayed containing a list of all the errors on that return. Please see below.

Phonics

Approve **All Errors** All Notes Add View Edit Delete Status

Phonics - Allenton Community Primary School

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

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
Collection	Y1 Phonics Transfer File	0	0	0		
Date Time	2012-06-23 15:30:47	0	0	0		
Year	2012	0	0	0		
LEA	831 - DERBY	0	0	0		
Software Code	Version 3	0	0	0		
Establishment Number	2400	0	0	0		
Pupils Overview					<a href="#">View All</a>	

Clicking on the 'Details' button will display the data item that is in error.

Allenton Community Primary School      Error report on 16/05/2012 at 10:37      Count 1      Return Details

Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Field	Value
1530		UPN invalid (characters 2-4 not a recognised LA code)	Errors			UPN	A123456789012

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## Adding Notes

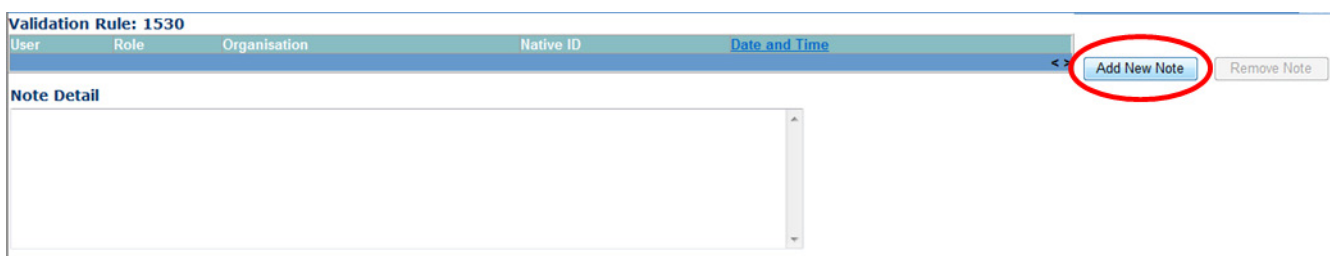
You can add your own notes to a query or error that cannot be resolved before submitting the data to the DfE if not already done by the school. Notes can be added to a return from within the 'All Errors' screen.



Rule No.	Return Level	Error Message	Priority OK'd	Notes	Field	Value
1530		UPN invalid (characters 2-4 not a recognised LA code)	Errors		UPN	A123456789012

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As you can see from the above there is a pencil icon at the end of each row. To add a note relating to each query please click on the pencil. You will then be presented with the screen below:



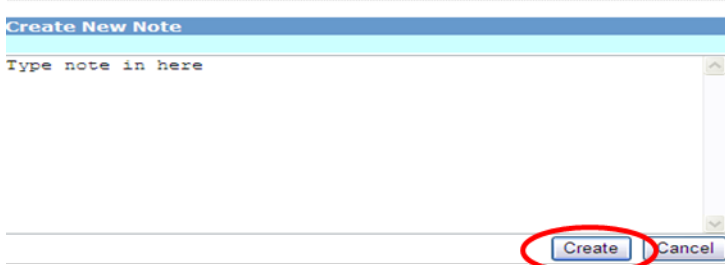
Validation Rule: 1530

User	Role	Organisation	Native ID	Date and Time
------	------	--------------	-----------	---------------

Note Detail

You need to click on Add New Note for you to be able to type in the notes box. To go back to the previous screen please select the back button.

### Note Page





Create New Note

Type note in here

Once you've typed in your explanation please click on Create Note. This will then save that note against the return.

You can tell if a note has been put beside a query as the pencil icon will change to a notepad, see below:



Rule No.	Return Level	Error Message	Priority OK'd	Notes	Field	Value
1530		UPN invalid (characters 2-4 not a recognised LA code)	Errors		UPN	A123456789012

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To view those notes just click on the notepad.

**Please note** even though you have entered an explanatory note against the errors and queries they will not disappear from COLLECT until they have been reviewed by the Department.

To get back to the previous screen please select the return button.

## Editing a return

First highlight the school where you wish to edit data in the list of schools on the main agent screen. Then Click on the 'Open Return' button in the Return Management section.

The screenshot displays the 'MY SOURCES' interface. At the top, there is a 'Filter By:' section with fields for Name, Native ID, Status, Org Group, and Queue, along with 'Go' and 'Reset' buttons. Below this is a 'Performance summary' table:

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
101	100	1	0	0	1	0	0

Below the performance summary is a table of 'Sources' with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The first row is highlighted with a red oval:

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

At the bottom of the interface, there is a 'Return Management' section with several buttons. The 'Open Return...' button is circled in red. Other buttons include 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. Below these are buttons for 'Upload Return for selected Source...', 'Upload Multiple Returns (zip file)...', 'Validate Selected Return...', 'Validate All Non-validated Returns...', and 'Launch Reports...'. There is also a 'Queue Management...' button and a 'Change Queue...' button. A dropdown menu is set to 'Dan'.

This will bring up all the same screens as described in the school section.

Once a return has been uploaded, an LA may go in and edit the data if necessary. The recommended approach is that if there are errors on the data when it is uploaded into COLLECT that the corrections should be made in the school MIS and a new output file generated and uploaded into COLLECT. This will ensure that the data in the MIS system is kept in line with the data being provided in the data collection return to the DfE, however there may be circumstances when it is necessary for data to be edited rather than a new file uploaded.

The first screen that can be edited is the Source School screen. When you first enter the screen it will be in view mode. To go into edit mode select the 'Edit' button at the top of the screen. All the fields can be updated. You'll need to click elsewhere on the screen for the field to update. If this results in error corrections then the errors will disappear.

To save any changes made, select the 'View' button.

Phonics

Approve All Errors All Notes Add **View** Edit Delete Status

Phonics - Allenton Community Primary School

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

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
Collection	Y1 Phonics Transfer File	0	0	0		
Date Time	2012-06-23 15:30:47	0	0	0		
Year	2012	0	0	0		
LEA	831 - DERBY	0	0	0		
Software Code	Version 2	0	0	0		
Establishment Number	2400	0	0	0		

Pupils Overview [View All](#)

# Approving a return

Once you have checked the schools and ensured you have added relevant notes to queries, please approve all your returns, by pressing the 'Approve All' button you are submitting the data to the Department. The Department can see the data as soon as it's loaded but cannot access it until you have approved it.

Users should highlight the return for approval and press the 'Approve' button. See below.

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
101	100	1	0	0	1	0	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
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8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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## Deleting a Return

This function allows the LA user to delete a selected school return. First highlight the school on the screen then select the 'Delete' button. This will delete the return and that school status will reset to 'No-Data'

## Rejecting a Return

This function allows the LA user to reject a selected school return. First highlight the school on the screen then select the 'Reject' button. This will change the status of the return to 'Rejected' and the return will have to either be re-submitted by the school or uploaded again by the school.

# Exporting a Return

Once the data has been submitted you can produce an export. An export will show all data submitted in either XML format or CSV (spreadsheet). You can then save a hard copy of the submitted data for reference.

To export the data, choose one of the three export options by clicking the button from the front screen.

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
101	100	1	0	0	1	0	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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Dan



Select the format for the export, CSV or XML then select the 'Export' button. You will be prompted to save or open the export file. Once this has run you will get an option to open or save the export.

**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

Export

If exporting multiple returns you will be presented with the following 'Select sources to Export' screen.

**Select Sources to Export**

**SELECT SOURCES TO EXPORT**

Select multiple Sources to Export, maximum allowed : 10

Available Sources	Sort by Status	Selected Sources
Sort by Name	Approved	
Allenton Community Primary School	Approved	
Alvaston Infant and Nursery School	Approved	
Arboretum Primary School	Approved	
Ash Croft Primary School	Approved	

>

<

<<

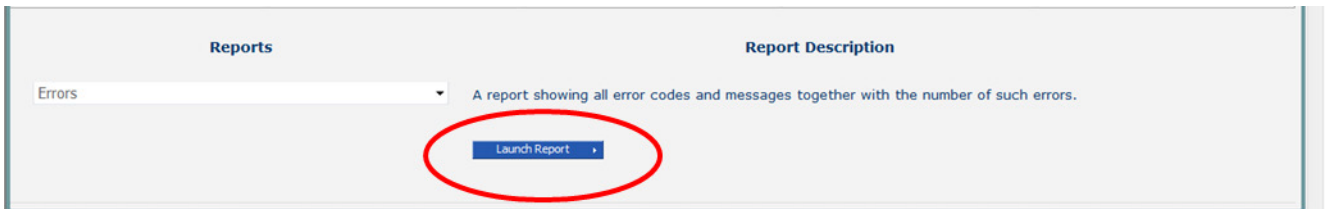
Export Selected Sources Cancel

Select 'Available Sources' and use the arrow keys to move them into/out of the 'Selected Sources'. Once you are happy with your selection, use the 'Export Selected Sources' button.

## Launching Reports

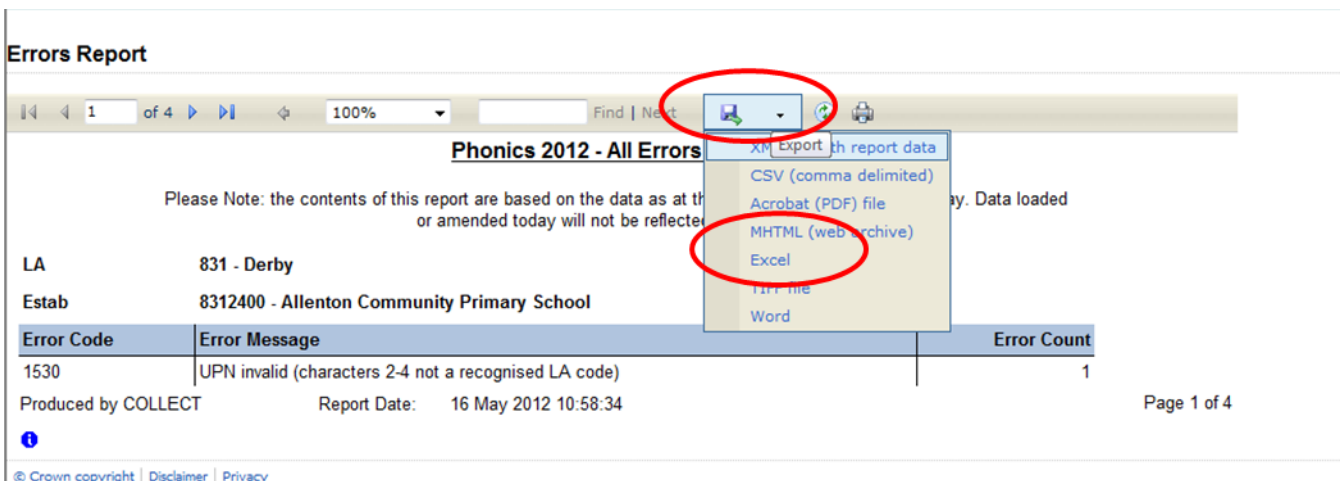
The Launch Reports option is available for each collection. This is where you can run various reports such as expected lists, error reports and school status reports amongst others.

Select the report you require from the drop down list and select 'Launch Report' button



The report will show on screen. Selecting the Export button will bring up a drop down list of export options. Selecting one will allow you to export the report to Excel, CSV etc.

You cannot print or sort the data in the report from COLLECT you need to export into Excel to be able to sort or Print the data



The screenshot shows the 'Errors Report' interface. At the top, there is a navigation bar with a search box and a 'Find | Next' button. Below this, the report title is 'Phonics 2012 - All Errors'. A note states: 'Please Note: the contents of this report are based on the data as at the time of the report or amended today will not be reflected'. The report details include: LA: 831 - Derby, Estab: 8312400 - Allenton Community Primary School. Below this is a table with columns 'Error Code', 'Error Message', and 'Error Count'. The table contains one row: Error Code 1530, Error Message 'UPN invalid (characters 2-4 not a recognised LA code)', Error Count 1. At the bottom, it says 'Produced by COLLECT' and 'Report Date: 16 May 2012 10:58:34'. The footer includes '© Crown copyright | Disclaimer | Privacy'. In the top right corner, there is an 'Export' button circled in red, which has opened a dropdown menu with options: 'XML Export (for report data)', 'CSV (comma delimited)', 'Acrobat (PDF) file', 'MHTML (web archive)', 'Excel', 'HTML file', and 'Word'. The 'Excel' option is also circled in red.

Error Code	Error Message	Error Count
1530	UPN invalid (characters 2-4 not a recognised LA code)	1

# Queues

When a number of people are working on a data collection within the LA, the use of the 'Queue' facility can help effective working. The use of queues helps in the allocation and identification of who is working on which schools and therefore helps to ensure that two or more people don't try and work on the same one.

Return to the Agent page and click the Queue Management button.

The screenshot shows a table of sources with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. Below the table is a control panel with various buttons. The 'Queue Management...' button is circled in red.

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

This will take you to the page entitled 'Work Flow Queues Management'

## Work Flow Queues Management

The screenshot shows the 'Registered Queues' section. On the left is a list box containing 'Shiela' and 'Test'. On the right, there are labels for 'Collection ID' (724), 'Queue Name' (Shiela), and 'Default Queue'. Below these is a form with an 'Add' button circled in red, along with 'Update' and 'Remove' buttons.

To add a name, click the Add button.

Type your name (or the name of a colleague) into the 'Queue Name' box then click OK. (Instead of a name you may wish to apportion schools by a day of week or by some other description depending on your LA's validation procedures).

The name/description will now be displayed in alphabetical order in the Registered Queues box.

Use the 'Update' button to modify a selected name/description.

The 'Remove' button allows you to remove a name/description from the 'Registered Queues' list. However, this can only be done if any schools linked with a particular name are removed first.

NB: The check-box used to set the 'Default Queue' was originally intended to allow a default queue to be allocated for a workflow stage, however the emerging requirement for the use of queues is for LAs to assign their own, as they work in different ways. It is therefore not applicable and has no effect on Queues.

To add schools to the newly created queues return to the agent page and click the 'Change Queue' button to go to the screen entitled 'Queue Management'

The screenshot shows a table with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The first row is highlighted. Below the table are various control buttons, with 'Change Queue...' circled in red.

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Amended_by_agent	14/05/2012			Dan	1	0	0
8312443	Alvaston Infant and Nursery School	No_Data				Dan	0	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	No_Data					0	0	0
8312509	Ash Croft Primary School	No_Data					0	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

You can now select and add or remove schools to and from different queues (click the right hand down arrow alongside the queue box to see a drop down list of names).

The screenshot shows the 'Queue Management' interface. On the left is a 'Queue Members' list containing: Allenton Community Primary School, Alvaston Infant and Nursery School, Becket Primary School, and Brackensdale Infant School. On the right is a 'Queue Non-Members' list containing 20 schools. Between the lists are navigation buttons: >>, >, <<, and <.

< or > will move individual schools or a group of schools selected in the direction of arrow. << or >> will move all schools in direction of arrows (although you will first be prompted to confirm this global move).

Highlight a School in the Queue Non-Members box and press the '<' button. This school will now appear in the box of Queue Members.

Return to the Agent page and you will see that the selected School has now been assigned to the selected queue.

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Approved	16/05/2012	16/05/2012		Dan	1	0	0
8312443	Alvaston Infant and Nursery School	Approved	16/05/2012	16/05/2012		Dan	1	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	Approved	16/05/2012	16/05/2012		Dan	1	0	0

An alternative way to attach a school to a particular person is to highlight the school under source name then click the 'Move to this Queue' button. This is a safer way to allocate schools to queues because you can see if any schools are already allocated to another queue first.

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8312400	Allenton Community Primary School	Approved	16/05/2012	16/05/2012		Dan	1	0	0
8312443	Alvaston Infant and Nursery School	Approved	16/05/2012	16/05/2012		Dan	1	0	0
8312442	Alvaston Junior Community School	No_Data					0	0	0
8312629	Arboretum Primary School	Approved	16/05/2012	16/05/2012		Dan	1	0	0
8312509	Ash Croft Primary School	Approved	16/05/2012	16/05/2012		Dan	1	0	0
8311014	Ashgate Nursery School	No_Data					0	0	0
8312005	Ashgate Primary School	No_Data					0	0	0
8312464	Asterdale Primary School	No_Data					0	0	0
8312004	Beaufort Community Primary School	No_Data					0	0	0
8312405	Becket Primary School	No_Data				Dan	0	0	0

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Dan

Using the 'Queue' facility as indicated above should enable a number of individuals to work on a data collection without running the risk of duplicating effort.

## 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 my COLLECT 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

## Filter Bars

<b>UPN</b>		<b>Surname</b>		<b>Forename</b>	
------------	--	----------------	--	-----------------	--

Only available on screens that could have a large record set record list. These allow you to sort the records on the screen.

## Left Hand Menu

The left hand menu can also be used to migrate to different screens.

- Phonics
- └ Pupils **[1]**
- └ Assessments

**Phonics - Allenton Community Primary School**

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)

Data Item	Value
Collection	Y1 Phonics Transfer File
Date Time	2012-06-23 15:30:47
Year	2012
LEA	831 - DERBY
Software Code	Version 3
Establishment Number	2400

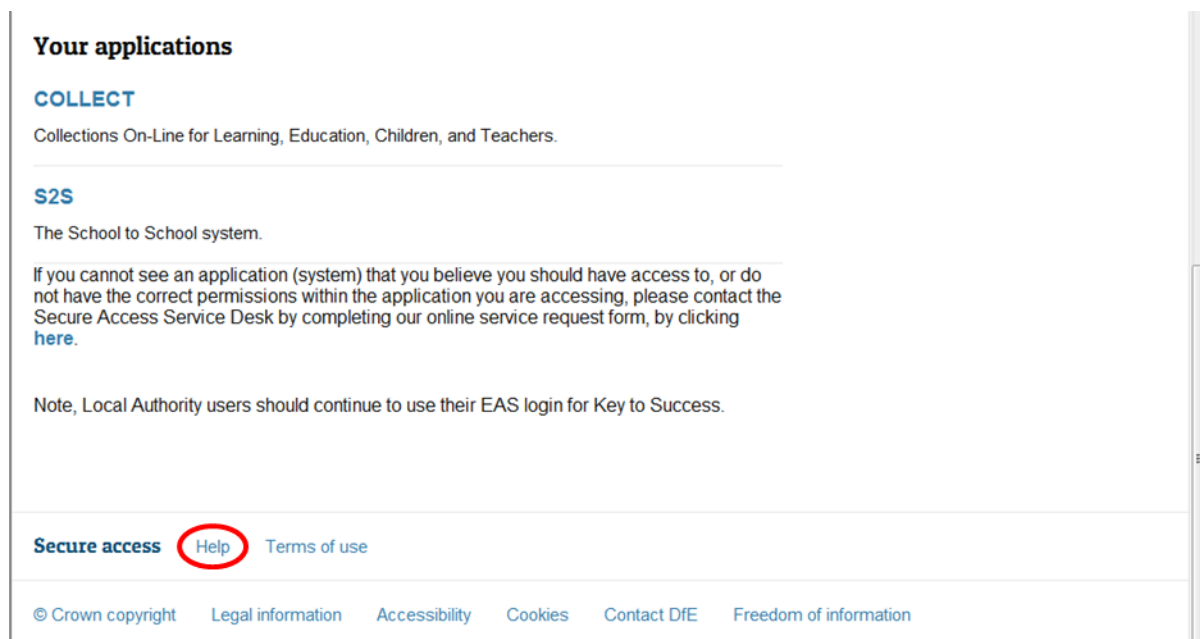
**Pupils Overview**

# 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



The screenshot shows a web page titled "Your applications" with two main sections: "COLLECT" and "S2S". The "COLLECT" section describes it as "Collections On-Line for Learning, Education, Children, and Teachers." The "S2S" section describes it as "The School to School system." Below the "S2S" section, there is a paragraph of text: "If you cannot see an application (system) that you believe you should have access to, or do not have the correct permissions within the application you are accessing, please contact the Secure Access Service Desk by completing our online service request form, by clicking [here](#)." A note follows: "Note, Local Authority users should continue to use their EAS login for Key to Success." At the bottom of the page, there is a navigation bar with links for "Secure access", "Help", and "Terms of use". The "Help" link is circled in red. Below the navigation bar, there is a footer with links for "© Crown copyright", "Legal information", "Accessibility", "Cookies", "Contact DfE", and "Freedom of information".

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.





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