



Department  
for Education

# **School census 2015**

**COLLECT guide for LAs**

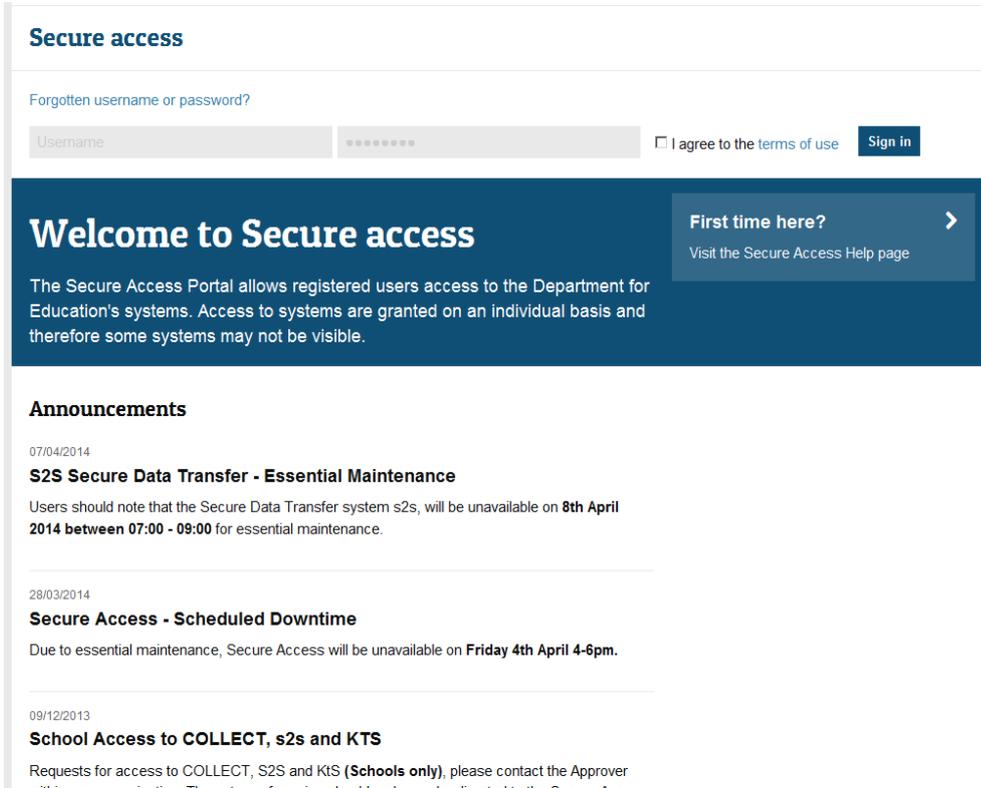
**January 2015**

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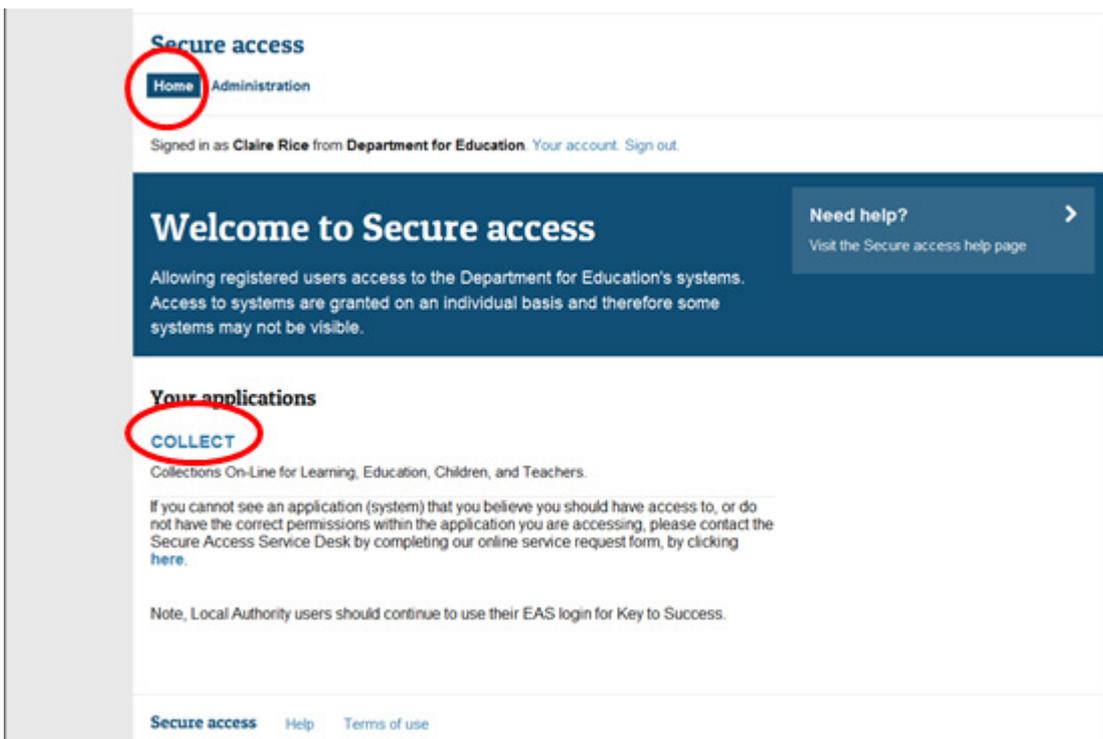
# COLLECT and secure access

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



Full Secure Access guides are published on the [Secure Access Website](#).

Once successfully registered, click on to 'Home' and then click on 'COLLECT' to enter COLLECT as below

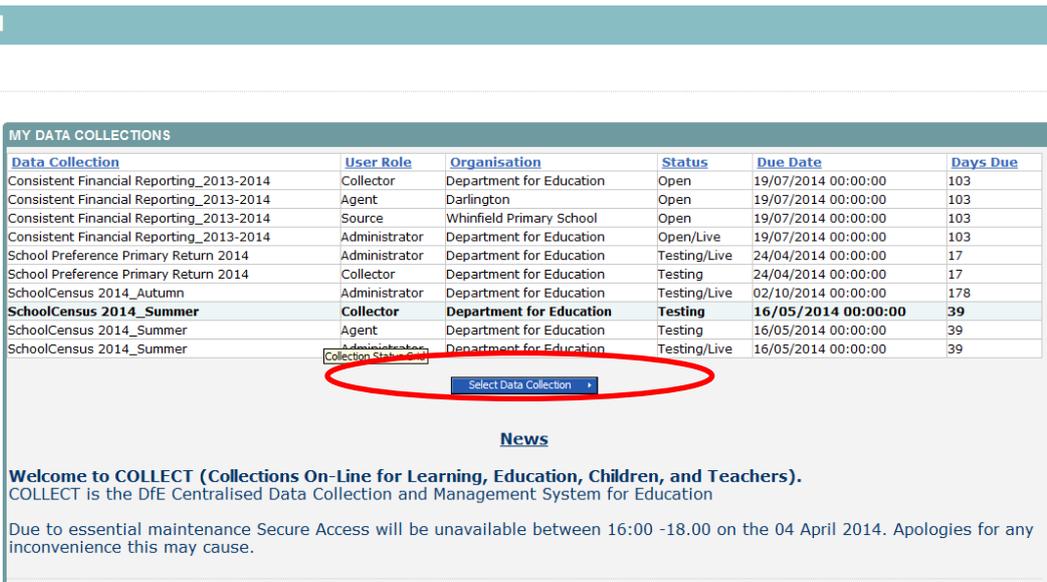


Then click on to 'Continue' to enter COLLECT as below.



**\*Please note: some screen shots refer to 2013 however the process is the same for all 2015 census collections.\***

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.



## Agent page

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

The screenshot shows the 'MY SOURCES' interface. At the top, there is a 'Filter By:' section with dropdown menus for Name, Native ID, Status, Org Group, and Queue, along with 'Go' and 'Reset' buttons. Below this is a 'Performance summary' table with columns for Expected, Outstanding, Submitted, Approved, Authorised, and Errors (E, Q, OK). The data shows 3042 Expected, 3040 Outstanding, 2 Submitted, 0 Approved, 0 Authorised, 74 Errors (E), 118 Errors (Q), and 0 Errors (OK). Below the summary is a 'Sources' table with columns for Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queeries, and OK Errors. The first row is highlighted in blue and shows Source ID 8734603, Source Name 'Abbey College, Ramsey', Status 'No\_Data', and Queue 'Academies'. Other sources listed include Abbey Grange Church of England Academy, Abbey Infants' School, Abbey Junior School, Abbeyfield School, Abbeywood Community School, Abbs Cross School and Arts College, Abington High School, Abington Vale Primary School, and Abraham Darby Academy. At the bottom, there are various action buttons like 'Approve All...', 'Export Multiple...', and 'Agent Administration...'. The page number 'Page 1 of 305' is visible at the bottom left.

The Agent screen comprises four main sections:

1. Filter by
2. Performance Summary
3. Sources
4. Agent Functions

## Filter by

This is a close-up of the 'Filter By:' section from the screenshot above. It shows five dropdown menus: Name, Native ID, Status, Org Group, and Queue. To the right of the Queue dropdown are 'Go' and 'Reset' buttons.

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							
Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					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

5. The total number of schools that a return is expected from;
6. The total number of schools who have yet to submit their return;
7. The total number of schools who have submitted their return;
8. The total number of school returns approved by the Local authority;
9. The total number of school returns authorised by the DfE;
10. 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	N[Source Status Grid]				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
3115401	Abbe Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
8948906	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).

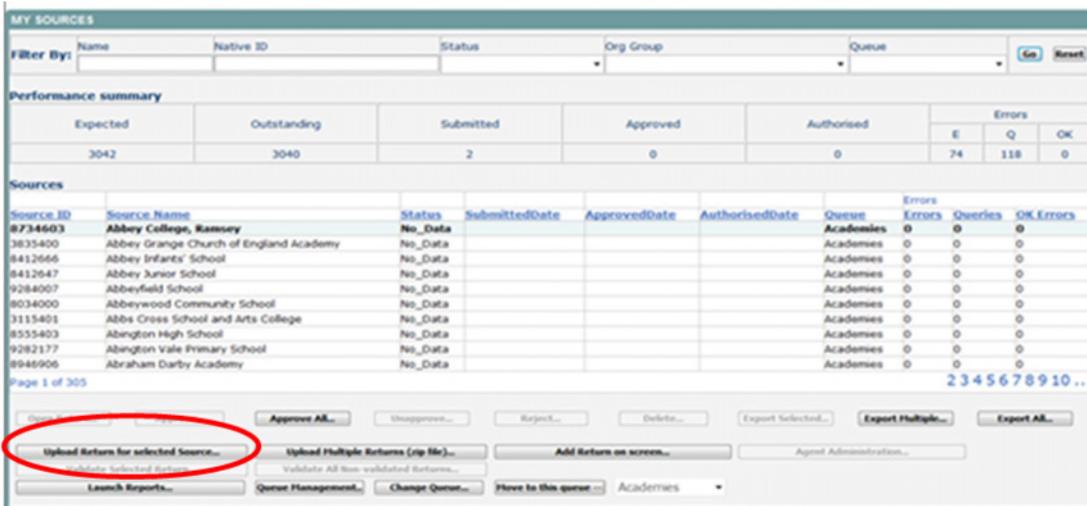
## Agent functions



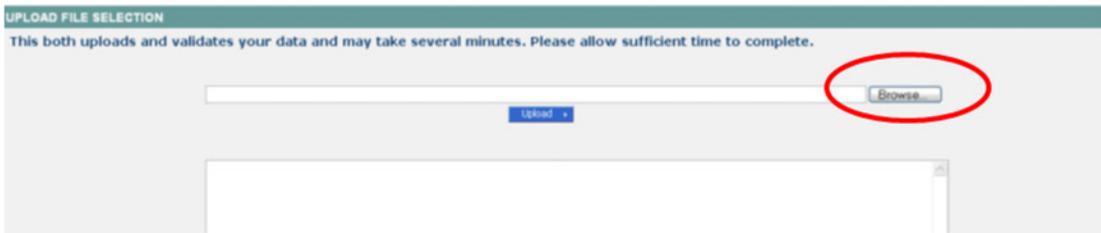
This section contains the functions that an Agent (LA) can use to manage the returns it is responsible for.

# Loading a return for a single school

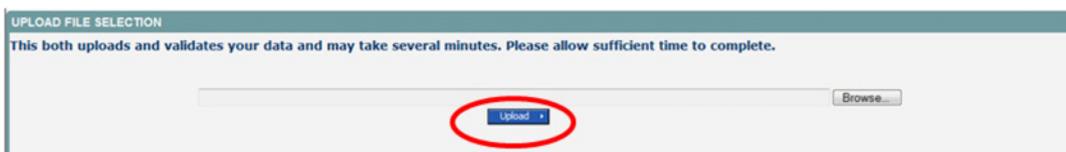
1) Click on the school you wish to load data for and click on the **Upload return for selected source** button.



2) Use the **browse** button to locate the XML file. Highlight the file name and click on **Open** to select the return.



3) Click on the **Upload** button to load the return.



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

Uploading School1.xml



Once the return has been loaded, the following message will be displayed on screen.



This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

4) Press the OK button to return to the agent main page.

*During periods of heavy demand, there may be a delay before the return is validated. Whilst the return has a status of "Waiting\_for\_validation" then the return cannot be viewed or edited.*

5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

*The only difference being that when an LA uploads a return then the status will be set to 'Submitted'. When a School uploads a return the status will be set to 'Loaded & Validated'.*

Once the return has been validated, the return status section on the source main page will display "Submitted" and the date. The total number of errors and queries found in the return will also be displayed. Additional function buttons will also be available in the Return Management section.

**COLLECT Portal**  
Agent Page SchoolCensus 2013\_Autumn

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	2	0	0	6	22	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	0	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
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary 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
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

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Academies

## Uploading multiple files

LAs can load multiple return files in a single transaction, rather than having to load each file individually. Before the facility can be used all files to be loaded must be placed in a zip file.

To access the facility, click on the **Upload Multiple Returns (zip file)** button.

The screenshot shows the 'MY SOURCES' interface. At the top, there is a filter 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					
3042	3040	2	0	0	74	118	0

Below the summary is a table of sources with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Output, Errors, Queries, and OK Errors. The first row is highlighted in blue. Below the table is a navigation bar with buttons: 'Open Returns...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. The 'Upload Multiple Returns (zip file)' button is circled in red. Other buttons include 'Upload Returns for selected Sources...', 'Add Returns on screen...', 'Agent Administration...', 'Validate Selected Returns...', 'Validate All Non-validated Returns...', 'Launch Reports...', 'Queue History...', 'Filter Returns...', and 'Move to this queue...'. The 'Academies' dropdown is also visible.

Click on the **Browse** button to navigate to the zip file in Explorer (ExampleZipFile.zip) that you want to upload.

The screenshot shows the 'UPLOAD FILE SELECTION' interface. It includes a message: 'This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.' Below this is a file input field with a 'Upload' button. The 'Browse' button is circled in red.

Once found, click on the **Upload** button to load the data into COLLECT. After the upload has been initiated a progress screen may be displayed, which will show details of the files as they are being loaded.

The screenshot shows the 'FILE UPLOAD PROGRESS' interface. It includes a message: 'Data return upload in progress, please wait....' and a loading spinner. Below this is a message: 'Loading raw return data, 132 elements processed'. At the bottom is a table with columns: File Name, Level Tag, Level Value, Organisation Type, Native ID Tags, Native ID, Source Organisation, and Upload Result.

Once a file is validated a results screen will show whether the file was successfully loaded.

# Viewing the return details

Select a return from the 'Agent' screen by clicking on school row and click on 'Open Return' to view it.

**COLLECT Portal**  
Agent Page SchoolCensus 2013\_Autumn

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue [Go] [Reset]

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	2	0	0	6	22	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	6	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
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary 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
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

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Buttons: Open Return... (circled in red), Approve..., Approve All..., Unapprove..., Reject..., Delete..., Export Selected..., Export Multiple..., Export All..., Upload Return for selected Source..., Upload Multiple Returns (zip file)..., Validate Selected Returns..., Validate All Non-validated Returns..., Launch Reports..., Queue Management..., Change Queue..., Move to this queue ->, Academies

You can view the return details by clicking on the various 'View All' links at the bottom of the screen.

School	<a href="#">View All</a>
Pupils on Roll	<a href="#">View All</a>
Pupils No Longer on Roll	<a href="#">View All</a>

When you click on the 'View All' for Pupils on Roll this takes you into the pupil section. This displays the 'Records List', with all pupils visible. You can use the filter bar to identify a particular pupil. Or click on the headers to sort alphabetically.

UPN	SurnameForename	DOB	Pupil Enrolment Status	Pupil Errors	Address	Termly Sessions	Summer Sessions	Annual Sessions	Exclusions	Post 16	FSM
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## Editing data within the return

The default view when a screen is displayed is 'View' mode. To edit the details click on the 'Edit' button.



The screenshot shows the COLLECT Portal interface for 'SC13 Autumn' at 'Abbey College, Ramsey'. The 'Edit' button is circled in red. The main content area displays a table of data items for 'School Census Autumn 2013'.

Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	SC	0	0	0		
Term	AUT	0	0	0		
Year	2013	0	0	0		
Reference Date	2013-10-03	0	0	0		
Source Level	S	0	0	0		
LA	873 - CAMBRIDGESHIRE	0	0	0		
Estab	4603	0	0	0		
Software Code	xmlTemplate	0	0	0		
Release	1.00 SC-AUT	0	0	0		
Xversion	2013	0	0	0		
Serial No	1	0	0	0		
Datetime	2013-08-23 11:27:57	0	0	0		

This enables data fields to be manually edited within COLLECT.

**Please Note:** Any changes made within COLLECT should always reflect the schools MIS.

Please see separate guide on Editing School Census Data for full instructions on how to change data.

## Errors

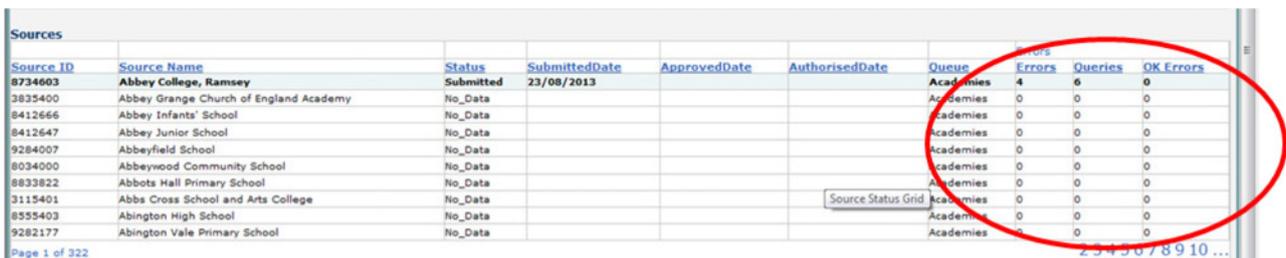
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

All errors and queries are highlighted in red against the relevant data item.

There are two levels of errors, 'Return Level' and 'Data Item Level'

## Total Return Errors

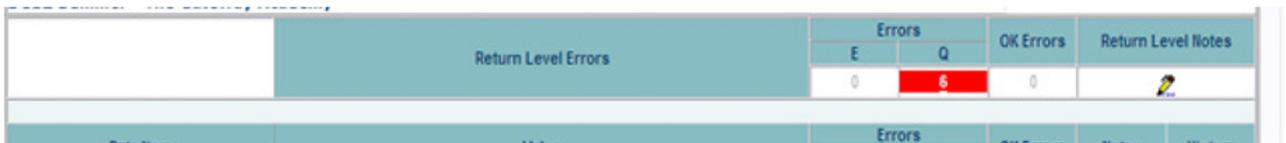
The breakdown of errors for a school return is shown in the Return Status section of the school's main screen.



Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queries	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	6	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
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary 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
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

## Return Level Errors

Return level errors relate to a validation rule that applies to the return as a whole rather than an individual data item within the return.



Return Level Errors	Errors		OK Errors	Return Level Notes
	E	Q		
	0	6	0	

## To view all errors and queries on the return

1) Click on 'All Errors' at the top of the screen.



2) You will then be shown a list of all errors and queries relating to your return. Click on the details button to see which data items the validation is checking, these will show to the right of the screen. If you click on one of the underlined fields you will be directed to the corresponding data item in the return.

Blade Error Report - SchoolCensus 2013\_Autumn

Abbey College, Ramsey Error report on 23/08/2013 at 14:20

Rate No.	Refers Level	Error Message	Priority (OK)	Count	Both	Field	Value
1510		UPN invalid (wrong check letter at character 1)	Errors	1			
2720		Qualification Accreditation Number is not a recognised value	Errors	1			
2724		Discount Code is not a recognised value	Queries	1			
1510		UPN invalid (wrong check letter at character 1)	Errors	1			
1510		UPN invalid (wrong check letter at character 1)	Errors	1			
1760Q	Y	Please check: No pupils in the school eligible for free school meals during the period since the last Census	Queries	1			
1870Q	Y	Please check: Percentage of pupils with sole registrations at the school is less than 95%	Queries	1			
2010Q	Y	Please check: 10%+ pupils' yr group differing from their age	Queries	1			
2200Q	Y	Please check: There are no pupils in the school with SEN provision	Queries	1			
TotT1C	Y	There are significantly fewer solely registered pupils than last term. (Last term = 1281.00, current term = 1.00)	Queries	1			

Return Details	
Field	Value
Governance	CA - Academies
Intake	COMP - Comprehensive
Phase	SS - Secondary (including CTCs and Academies)
UPN	<u>H873547854112</u>

## Correcting Errors

Identify which of the fields contains the incorrect value and return to the screen that contains it by clicking on the field value in the details section.

Either:

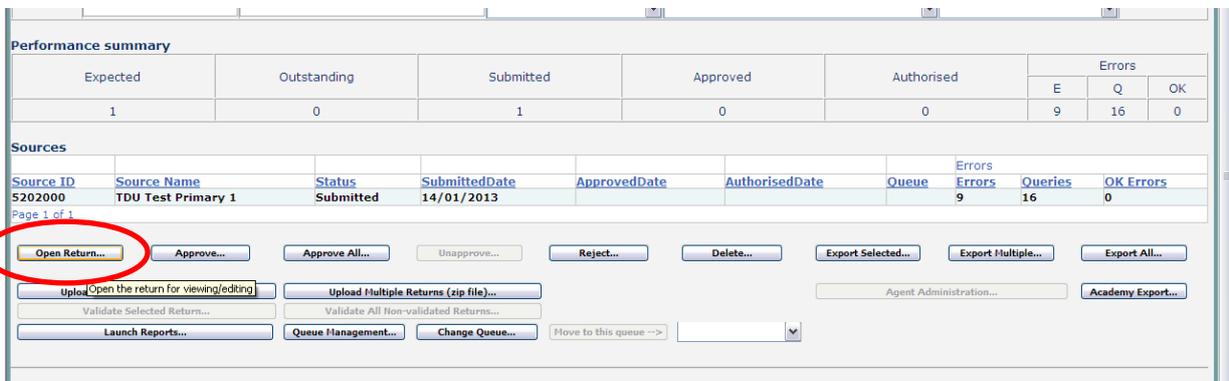
- 1) Contact the relevant school – advise they need to correct in their MIS and re-load their School census file to COLLECT, overwriting the incorrect one.
- 2) Change the mode of the form to 'Edit' and then click on the data item that needs to be changed and update it – ensuring the school reflect this change in their MIS
- 3) As schools can now edit their own data the third option is - Contact the relevant school and ask them to 'Edit' the data, reflecting in their MIS, ensuring they re-submit their data on COLLECT.

# Updating class information

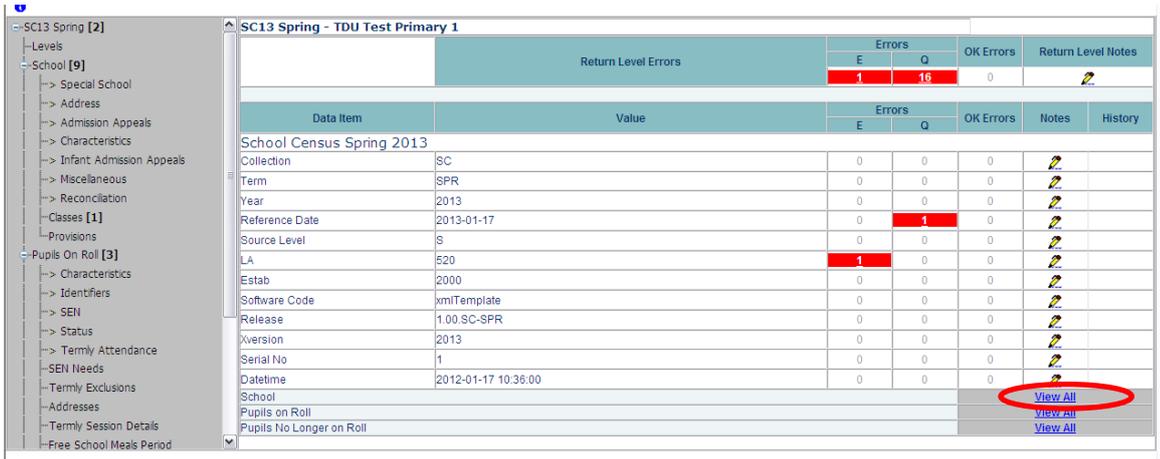
The Census collects information regarding all classes running at the selected time on Census day. The Infant class guidance states that the school standards and framework act limit the size of an infant class during an ordinary teaching session to 30 pupils per teacher. The calculation is based on the pupil:teacher ratio not pupil:adult ratio, therefore regardless as to how many teaching assistants there are, the class will be treated as unlawful if there are over 30 pupils with 1 teacher.

There are certain exceptions to the limit as specified in the school census guidance. These exceptions need to be manually entered into COLLECT once double checked it is correct. Please follow the steps below to do this.

- 1) Once logged into COLLECT, select the correct school and 'Open Return'



- 2) Click on the school 'View All' link



Now click on the classes 'View All'

School - Characteristics - TDU Test Primary 1

School Characteristics		Errors	OK Errors	Notes	History
Data Item	Value	E	Q		
School Name	TDU Test	0	0	0	
School Phase	PS - Primary	6	3	0	
School Type	17 - Junior school, 7/8-11	0	1	0	
Maximum Year Group	5 - Year 5	0	0	0	
Minimum Year Group	1 - Year 1	0	0	0	
Intake Type	comp	6	3	0	
Governance	FO - Foundation	6	3	0	
School Email Address	M@M.COM	0	0	0	
School Telephone Number	01325 39262	0	0	0	
Classes		0	0	0	<a href="#">View All</a>

3) Select the class with the unlawful size by clicking on it, then click 'Edit'

Classes - TDU Test Primary 1

Class Reference Name	Class Key Stage	Class Year Group	Number of Pupils from the host school in class	Rule Errors
A	1 - Key Stage 1	2 - Year 2	0	0
B	1 - Key Stage 1	1 - Year 1	31	1

Classes		Errors	OK Errors	Notes	History
Data Item	Value	E	Q		
Class Reference Name	B	0	0	0	
Number of Teachers in Class	1	0	1	0	
Number of Adult Non Teachers in Class	0	0	0	0	
Class Year Group	1 - Year 1	0	1	0	
Class Type	O - Not a nursery class	0	0	0	
Class Key Stage	1 - Key Stage 1	0	1	0	
Class Activity	MA - Mathematics or Numeracy	0	0	0	
Number of Pupils from the host school in class	31	0	1	0	
Number of Pupils from other schools in the class	0	0	1	0	
The number of teachers on PPA time		0	1	0	
The number of pupils who are on exception A		0	1	0	
The number of pupils who are on exception B		0	1	0	
The number of pupils who are on exception C		0	1	0	
The number of pupils who are on exception D		0	1	0	
The number of pupils who are on exception E		0	1	0	

Enter either, an increase in teachers or the amount of teachers on Planning and Preparation time (PPA) also known as Learning Manager Time (LMT) or the amount of pupils admitted under each exception. Please note it is important that 'exceptions' are reported correctly for example 'Fair Access' does not come under any of the exceptions categories therefore please liase with LA colleagues in School Admissions. Then click 'View' to save.

The screenshot shows a software interface for managing school data. At the top, there are buttons for 'Approve', 'All Errors', 'All Notes', 'Add', 'View' (circled in red), 'Edit', 'Delete', and 'Status'. Below this is a tree view on the left showing 'SC13 Spring [2]' and 'School [9]'. The main area displays 'Classes - TDU Test Primary 1' with a table of class data. The table has columns for 'Class Reference Name', 'Class Key Stage', 'Class Year Group', 'Number of Pupils from the host school in class', and 'Rule Errors'. Below this is a detailed view of the 'Classes' data item, showing fields like 'Class Reference Name', 'Number of Teachers in Class' (with a red circle around the value '1'), 'Class Year Group', 'Class Type', 'Class Key Stage', 'Class Activity', and various 'Number of Pupils' and 'The number of teachers on PPA time' fields. The 'Number of Pupils from the host school in class' is 31. The 'Number of Pupils from other schools in the class' is 0. The 'The number of teachers on PPA time' is 0. The 'The number of pupils who are on exception D' is 1 (circled in red). Other exceptions (A, B, C, E, F, G, H) have 0 pupils. The 'Rule Errors' column shows 1 error for the 'Number of Teachers in Class' and 1 error for 'The number of pupils who are on exception D'.

The query will now have cleared from the return for that class.

The screenshot shows the same software interface, but the 'View' button is no longer visible. The 'Classes - TDU Test Primary 1' table now shows two classes: 'A' and 'B'. Class 'A' has 'Class Key Stage' 1, 'Class Year Group' 2-Year 2, 'Number of Pupils from the host school in class' 1, and 'Rule Errors' 0. Class 'B' has 'Class Key Stage' 1, 'Class Year Group' 1-Year 1, 'Number of Pupils from the host school in class' 31, and 'Rule Errors' 0. The 'Number of Pupils from other schools in the class' is 0 for both classes. The 'The number of teachers on PPA time' is 0 for both classes. The 'The number of pupils who are on exception A' through 'H' are 0 for both classes. The 'Rule Errors' column shows 0 errors for both classes.

**This needs to be done for all unlawful classes in your school. Please refer to additional documentation 'infant class size validation' for further guidance: <https://www.gov.uk/school-census>**

## Providing clarification/ supplementary information

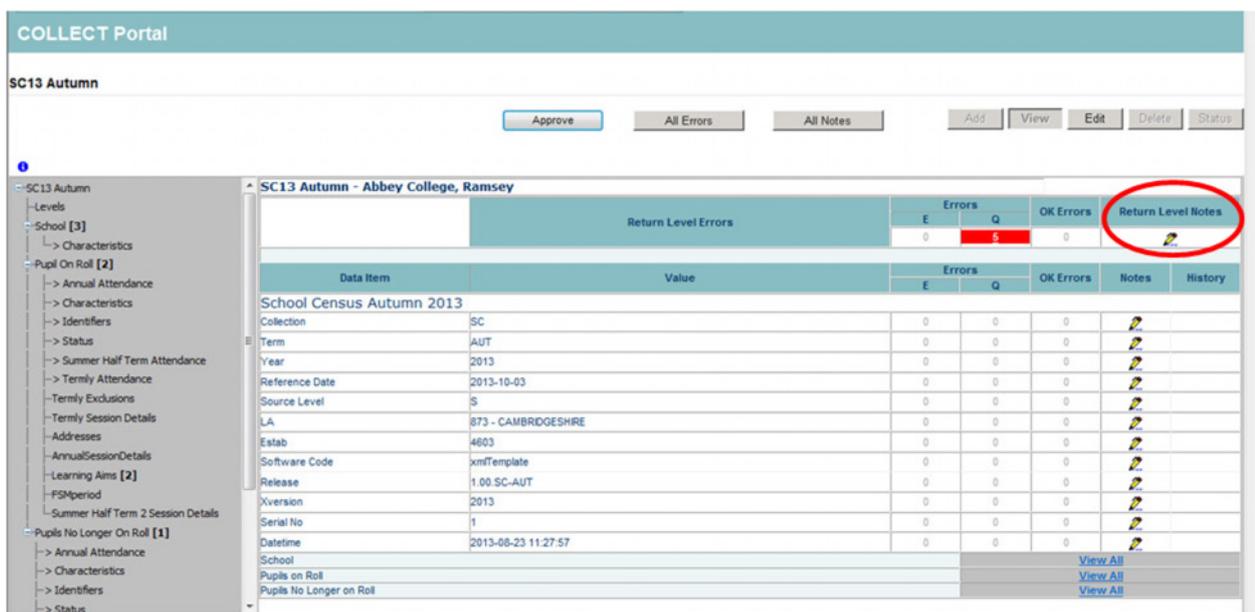
In some instances you will be requested to provide explanatory information (as part of email communications you will receive a document which will provide guidance on what notepad explanation would be expected for individual queries. This will also be made available on our web page [School Census 2015](#) ) about a data value when an item has an associated query against it.

If a notepad entry is not returned the EDD Helpdesk will have to contact the local authority for further information.

There are several levels where you can add Notes, return level, field level, Error level and in 'All Errors' against the query.

**Where possible DfE would recommend entering all notes at return level as this will avoid notes being lost in the event of a resubmission as unlike other notepad entries, the Return Level notes are not overwritten if a resubmission is made.**

- 1) To add a return level note double click on the pen icon in the return level notes section.



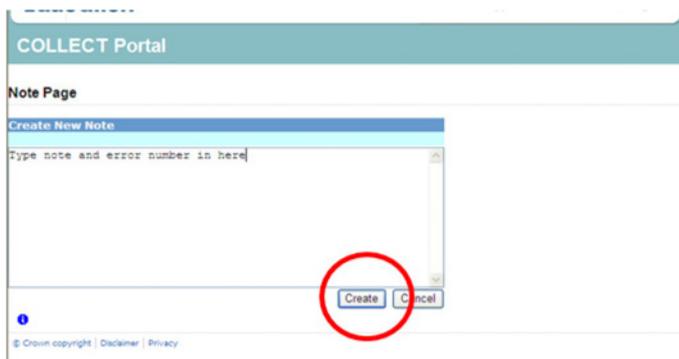
The screenshot shows the COLLECT Portal interface. The main content area displays a table for 'Return Level Errors' for 'SC13 Autumn - Abbey College, Ramsey'. The table has columns for 'Data Item', 'Value', 'Errors' (subdivided into 'E' and 'Q'), 'OK Errors', 'Notes', and 'History'. A red circle highlights the 'Return Level Notes' icon (a pen) in the top right corner of the table. The table lists various data items such as 'Collection', 'Term', 'Year', 'Reference Date', 'Source Level', 'LA', 'Estab', 'Software Code', 'Release', 'Xversion', 'Serial No', and 'Datetime'.

- 2) Click add new note



The screenshot shows the 'Note Detail' form in the COLLECT Portal. The form has a large text area for entering notes. A red circle highlights the 'Add New Note' button in the top right corner. Below the main form, there is a section for 'Preserved notes deleted by resubmissions' with a table showing columns for 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. A 'Remove Preserved Note' button is also visible.

3) Type your note and the error number in the box provided and click create.

The image shows a screenshot of the COLLECT Portal interface. At the top, there is a teal header bar with the text 'COLLECT Portal'. Below this, the page is titled 'Note Page'. A sub-section titled 'Create New Note' contains a text input field with the placeholder text 'Type note and error number in here'. At the bottom of this section, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is circled in red. At the very bottom of the page, there is a small blue icon and the text '© Crown copyright | Disclaimer | Privacy'.

**Please ensure there is a note for all queries/errors remaining on your schools return.**

**You can enter one note to cover numerous queries.**

**E.g. – 3 x 2020Q – Confirmed correct, 1 x 1780Q – Confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in summer term**

## Approving the return

The LA is responsible for 'approving' the return once the school has 'submitted' it. The LA is expected to investigate and resolve any outstanding return errors before approving a return.

To 'Approve' a return:

- 1) Go to the 'agent main screen' and select the school by clicking on its name.

The screenshot shows the 'COLLECT Portal' interface. At the top, it says 'Agent Page SchoolCensus 2013\_Autumn'. Below this is a 'MY SOURCES' section with a filter table. The 'Performance summary' table shows 3214 Expected, 3212 Outstanding, 2 Submitted, 0 Approved, and 0 Authorised returns. The 'Sources' table lists various schools, with the first row 'Abbey College, Ramsey' highlighted in blue and its status 'Submitted' on 23/08/2013. Below the table are several action buttons: 'Open Return...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', 'Export All...', 'Upload Return for selected...', 'Validate Selected Returns...', 'Validate All Non-validated Returns...', 'Launch Reports...', 'Queue Management...', 'Change Queue...', and 'Move to this queue -->'. The 'Approve...' and 'Approve All...' buttons are circled in red.

Once selected, approve the return by clicking the **Approve** (Approve the highlighted single return) or **Approve All** (Approves all returns at Submitted stage) button.

Screen information will be updated:

The screenshot shows a 'Performance summary' table and a 'Sources' table. In the 'Performance summary' table, the 'Submitted' and 'Approved' columns are circled in red, showing values of 1 and 1 respectively. In the 'Sources' table, the first row for 'Abbey College, Ramsey' has its 'Status' (Approved) and 'ApprovedDate' (23/08/2013) circled in red. Below the tables is a control panel with buttons for 'Open Return...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. The 'Unapprove...' button is circled in red.

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
3214	3212	1	1	0	E	Q	OK
6	22	0					

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK	Errors
8734603	Abbey College, Ramsey	Approved	23/08/2013	23/08/2013		Academies	4	6	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	
8034000	Abbeywood Community School	No_Data				Academies	0	0	0	
8833822	Abbots Hall Primary 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	
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0	

- The status of the return will be set to 'Approved' and the 'Date Approved' will be completed
- The 'Approved' total in the performance summary will increase by 1 and the 'Submitted' count will decrease by 1
- The **Approve** button will now be disabled for this return
- The **Unapprove** button will now be enabled.

# Queues

When a number of people are working on Census files, the use of the 'Queue' facility can help effective working.

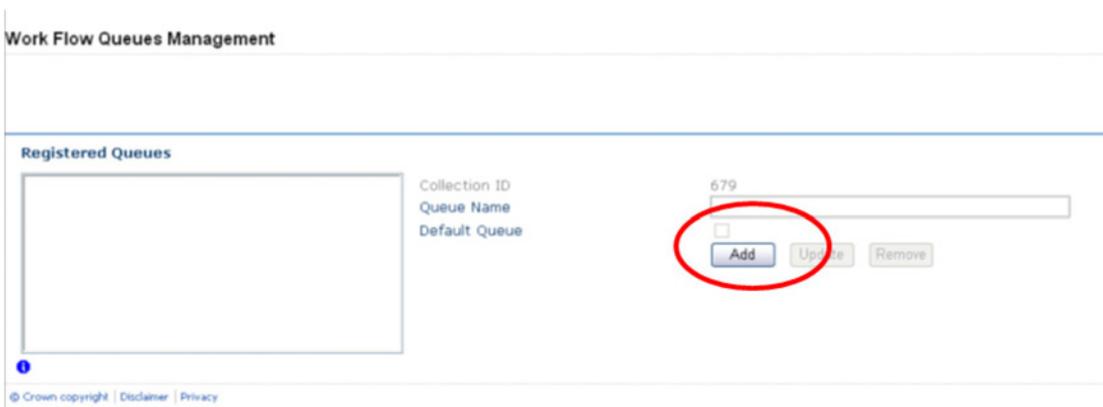
The use of 'Queues' helps in the allocation and identification of who is working on which files and therefore helps to ensure that two or more people don't try and work on the same file.

- 1) From the **Agent page** click the **Queue Management** button.



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

- 2) To add a name, click the **Add** button.



- 3) 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.

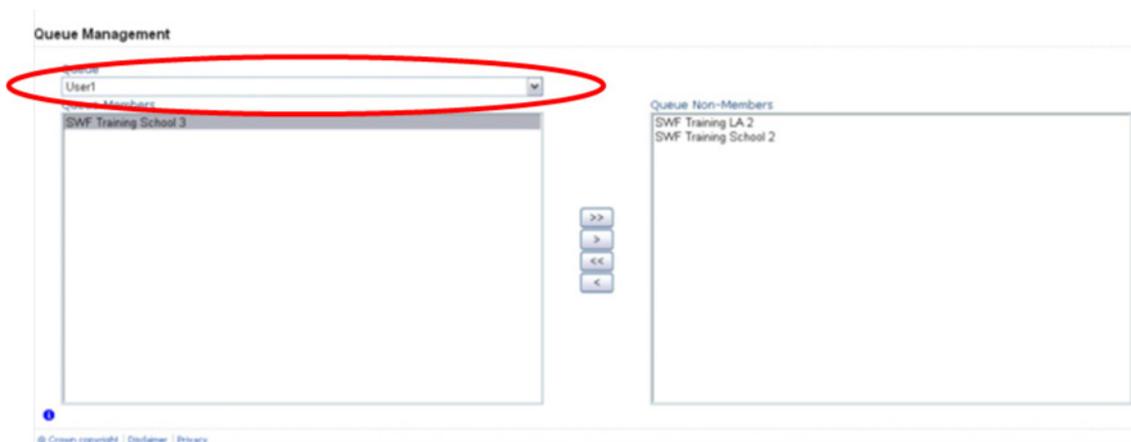
The **Remove** button allows you to remove a name/description from the 'Registered Queues' list. However, this can only be done if any schools linked with a particular name are removed first.

*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.*

Return to the **Agent page** by selecting **Back to My Collect page** at the top of the page and click the **Change Queue** button to go to the screen entitled 'Queue Management'

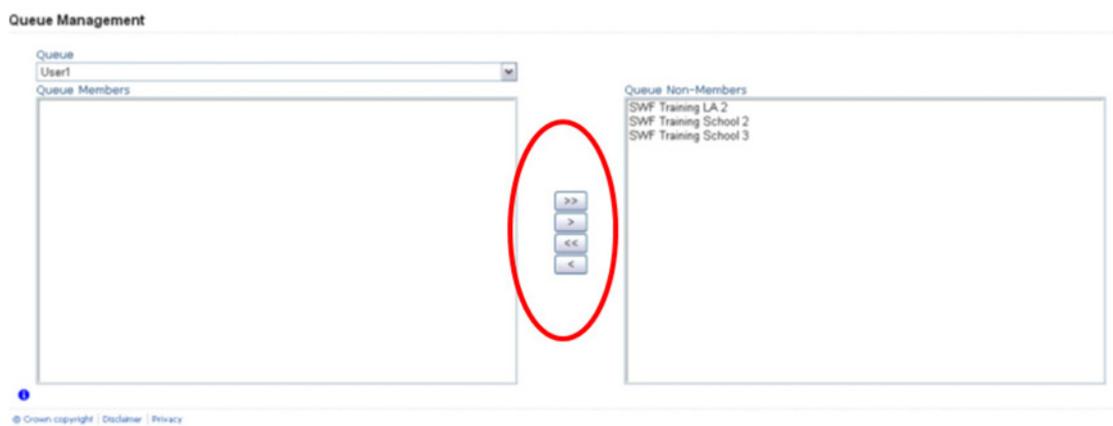


- 4) You can now select and add or remove schools to and from different Queues (click the right hand down arrow alongside the 'Queue' box to see a drop down list of names).



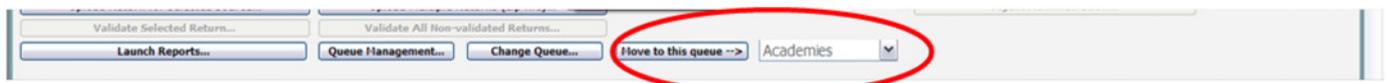
5) Highlight a school in the 'Queue Non-Members' box and press the < button. This school will now appear in the box of 'Queue Members'.

< 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).



Return to the **Agent page** by selecting **Back to My Collect page** at the top of the page and you will see that selected school has now been assigned to the selected queue.

\* 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 can be a safer way to allocate schools to queues because you can see if any schools are already allocated to another queue first).



# Reports

1) A number of reports are available on COLLECT, return to the **Agent page** and click on the **Launch Reports** button.

Agent Page SchoolCensus 2013\_Autumn

MY SOURCES

Filter By: Name Native ID Status Org Group Queue Go Reset

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	1	1	0	6	22	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Approved	23/08/2013	23/08/2013		Academies	4	6	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
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary 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
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

Page 1 of 322 2 3 4 5 6 7 8 9 10 ...

Open Returns... Approve... Approve All... Unapprove... Reject... Delete... Export Selected... Export Multiple... Export All...

Upload Return for selected Source... Upload Multiple Returns (zip file)... Agent Administration... Academy Export...

Launch Reports... Queue Management... Change Queue... Move to this queue --> Academies

11. A drop down menu will be display and a report can be selected from that drop down list

**It is extremely important that you run these reports especially the Duplicate Reports.**

Duplicate Reports will indicate pupils who are registered at more than one school and therefore would indicate if the pupil should remain on roll or whether the registration status has been recorded incorrectly.

**In Spring and Autumn School Census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your LA/Schools as each pupil is funded only once.**

**There will be individual user guides for reports available on the education website.**

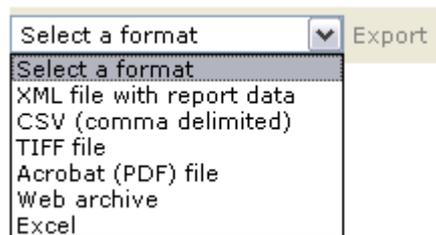
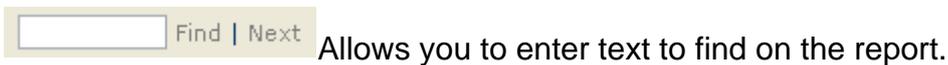
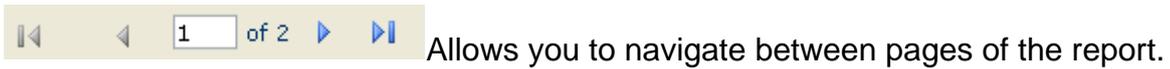
## School Census 2015

2) Select the report you wish to run and click launch report.

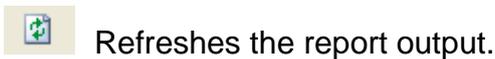
Along the top of the report you will see a toolbar with various functions.



These are explained as follows.



Clicking the drop-down menu, results in the display of a list-box showing various formats in which you can export the report. Select one of the formats, click the **Export** button and you will then be prompted to 'Open' or 'Save' the output file. Click on the 'Save' button to save the report file.



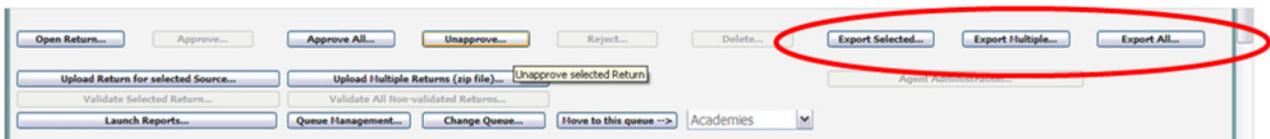
## Exporting a return

A return can be exported in xml or csv format

### Exporting a return (Current state)

On the **Agent page** there are three export options.

- 1 Export selected – One school
- 2 Export Multiple – Up to 10 schools
- 3 Export All – All schools

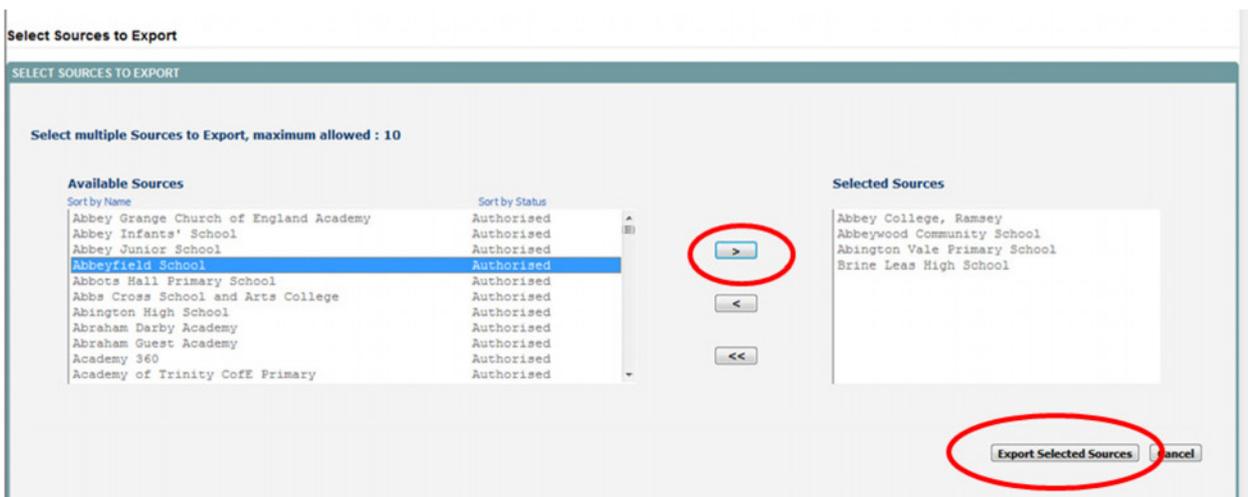


### Export selected

- 1) Click on the school you wish to export – highlighting it
- 2) Click on Export Selected button

### Export multiple

- 1) Click on Export Multiple button
- 2) Select schools you wish to export by moving over to the right hand box
- 3) Click Export selected sources



### Export all

- 1) Click on Export all

## Academy export

Local Authorities have a function within COLLECT to export all 'Authorised' academy data. The export contains a sub-set of data agreed by the Academies Team, anything not contained within the export the DfE are unable to share.

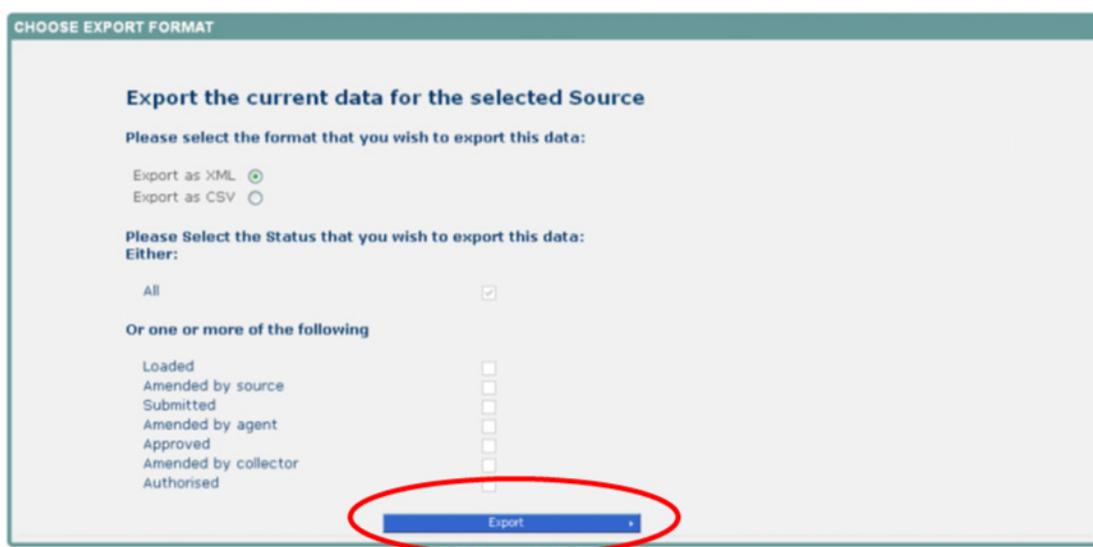
- 1) Click on academy export



## Selecting format

Once you have clicked one of the three options above and followed any instructions the following screen will be displayed.

- 1) Choose to export in either XML or CSV format, then click on the **Export** button.

A screenshot of a dialog box titled 'CHOOSE EXPORT FORMAT'. The dialog contains the following text: 'Export the current data for the selected Source', 'Please select the format that you wish to export this data:', 'Export as XML' (selected with a radio button), 'Export as CSV', 'Please Select the Status that you wish to export this data: Either:', 'All' (checked with a checkbox), 'Or one or more of the following', 'Loaded', 'Amended by source', 'Submitted', 'Amended by agent', 'Approved', 'Amended by collector', 'Authorised'. At the bottom of the dialog, there is a blue 'Export' button, which is circled in red.

- 2) A progress message will be displayed



- 3) When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.

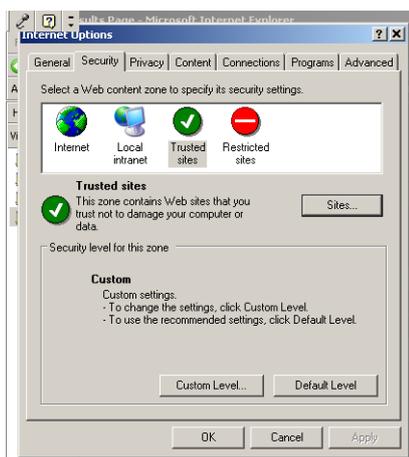
Export Results Page			
INFORMATION			
Export Finished.			
EXPORT RESULTS			
Results of export			
Folder	Organisation Name	Native Id	Result
/EstabNo=8734603	Abbey College, Ramsey	8734603	Data Collected

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**Important Note:** If the export process fails, with a message stating that Internet Explorer has blocked download of a file, you might succeed if you try again. On the second attempt, hold down the **Ctrl** key down continuously from before you click on **Export** until after you see the resulting files displayed in Windows Explorer. If this is still not successful, you will have to adjust the security settings on your internet browser.

## Adjusting security settings

The security settings on your pc may prevent the '**File Download**' appearing. If this is the case then go into the '**Tools**' menu option at the top of the screen.



Select '**Internet Options**' from the drop down menu.

Select '**Security**' from the option buttons

Selected '**Trusted Sites**'

Select '**Sites**'

The select '**Add**' and type the following into the text box in turn:

<https://collectdata.education.gov.uk/CollectPortalLive/MainPage.aspx>

<https://sa.education.gov.uk/idp/Authn/UserPassword>

Then select ok and ok. Then try producing the export again and this time the Open/Save/Cancel dialog box should appear.

## Screen functionality

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

### Screen navigation

**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 controls

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.	Takes you to the sub module level details

## Mode buttons

Those buttons determine which operation mode the on-screen data form 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

## Help

If you do not have access to Collect for school census you will need to complete the service request form, also If you have any queries regarding School Census or have a change to your contact details please could you complete [Service Request form](#).



Department  
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