



Department
for Education

School census 2015

**COLLECT guide for academies, free
schools, studio schools, UTCs and NMSS**

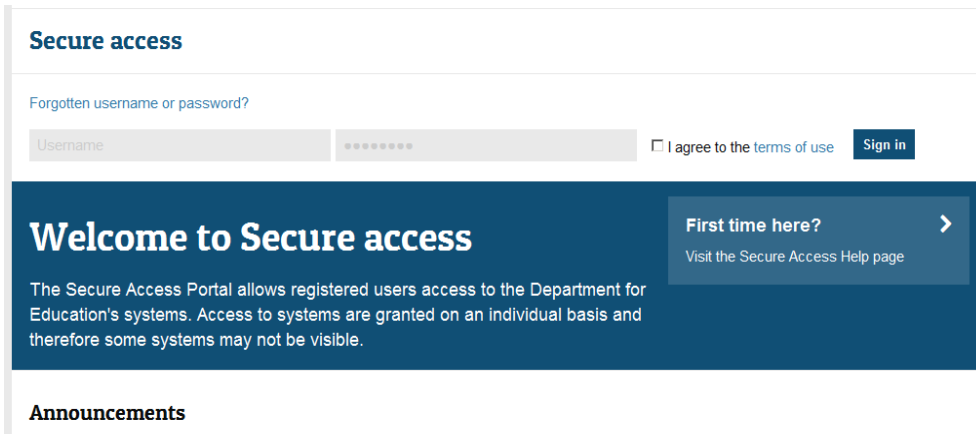
May 2015

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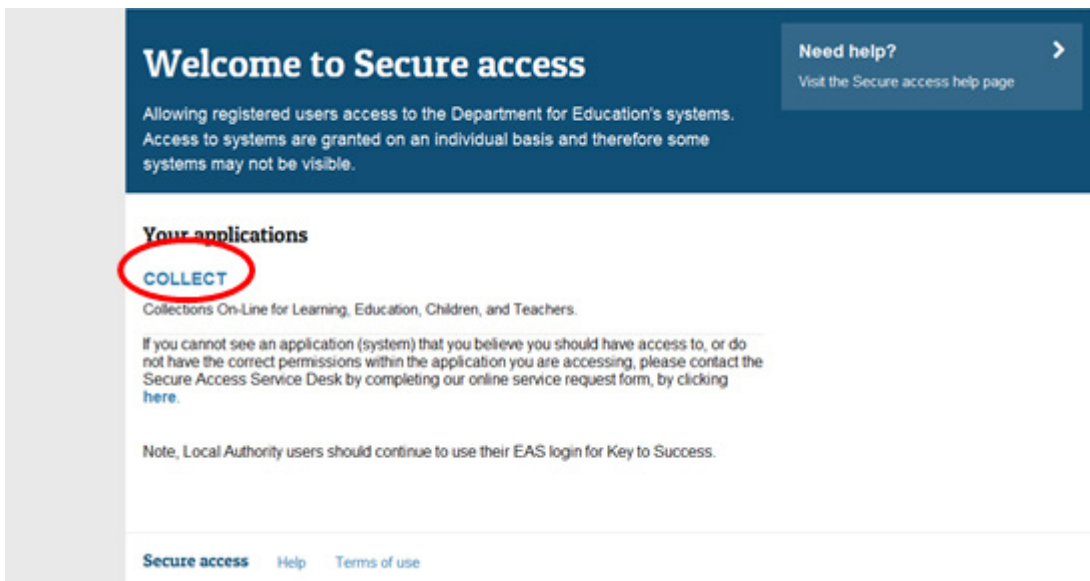
COLLECT and secure access

Access to COLLECT is through the department's secure access system (SA)

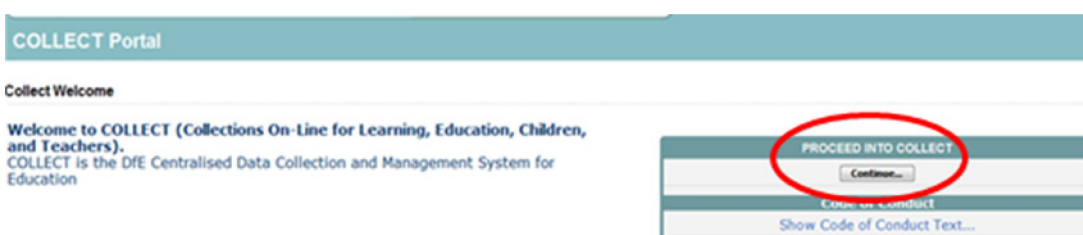


Full secure access guides are published on the [secure access website](#).

Once secure access has been successful, click on to '**Home**' and then click on '**COLLECT**' to enter COLLECT as below.



To proceed into COLLECT please click on the '**Continue**' button as below.



Select the collection you wish to open 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 screenshot displays the 'MY DATA COLLECTIONS' section of the COLLECT system. It features a table with columns for Data Collection, User Role, Organisation, Status, Due Date, and Days Due. The first row, 'SchoolCensus 2015_Summer', is highlighted in red. Below the table, a 'Select Data Collection' button is circled in red. The interface also includes a 'NEWS' section and a welcome message for the COLLECT system.

Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2015_Summer	Collector	Department for Education	Familiarisation	17/06/2015 00:00:00	47
SchoolCensus 2015_Summer	Agent	SA Test LA Open	Familiarisation	17/06/2015 00:00:00	47
SchoolCensus 2015_Summer	Source	TDU Test Primary 2	Familiarisation	17/06/2015 00:00:00	47
SchoolCensus 2015_Summer	Administrator	Department for Education	Familiarisation/Live	17/06/2015 00:00:00	47
SchoolCensus 2015_Spring	Administrator	Department for Education	Open/Live	15/01/2015 00:00:00	-106
SchoolCensus 2015_Spring	Agent	Department for Education	Open	15/01/2015 00:00:00	-106
SchoolCensus 2015_Spring	Collector	Department for Education	Open	15/01/2015 00:00:00	-106
SchoolCensus 2015_Autumn	Administrator	Department for Education	Testing/Live	01/10/2015 00:00:00	353
SchoolCensus 2014_Summer	Agent	Department for Education	Testing	15/05/2014 00:00:00	-351
SchoolCensus 2014_Summer	Collector	Department for Education	Testing	15/05/2014 00:00:00	-351

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[Select Data Collection](#)

NEWS

Welcome to COLLECT (Collections On-Line for Learning, Education, Children, and Teachers).
COLLECT is the DfE Centralised Data Collection and Management System for Education

COLLECT Exports
We are aware of a technical issue affecting some users attempting to export files from COLLECT when using Internet Explorer 11 software. This is being urgently investigated by our service partners. Customers experiencing problems can revert to an earlier version of Internet Explorer or use alternative web browser software. We apologise for any inconvenience caused.

Source

The source (school) main screen will now be displayed.

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

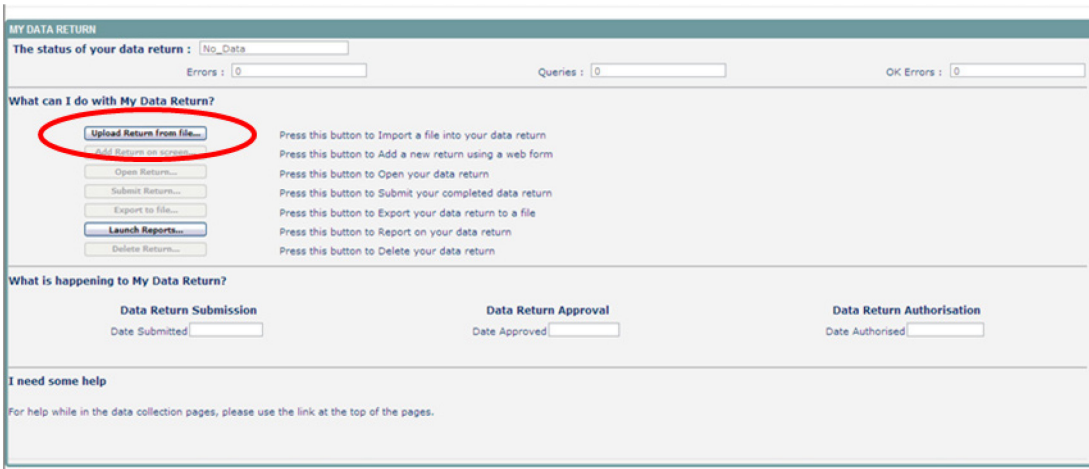
Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

I need some help

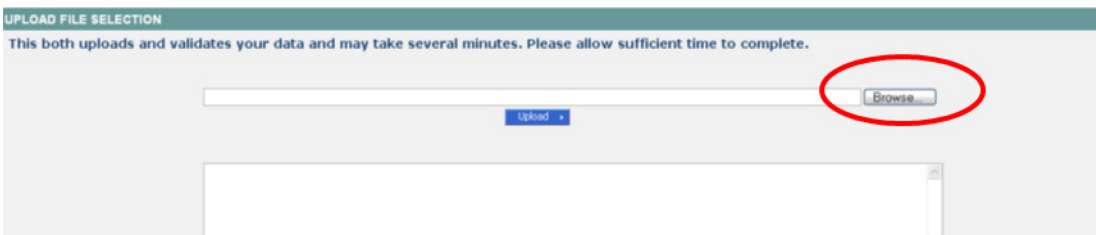
For help while in the data collection pages, please use the link at the top of the pages.

Loading a return

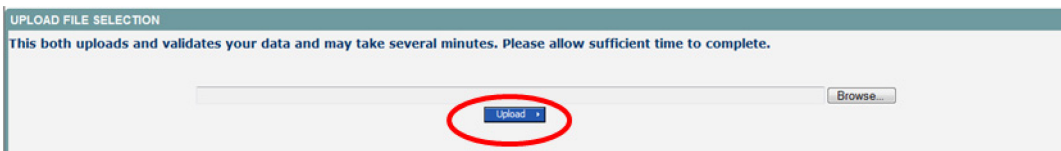
1) Click on **upload return from file**



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

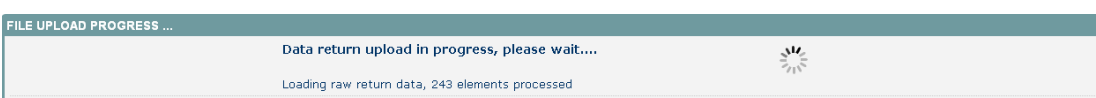


3) Click on the **upload** button to load the return.

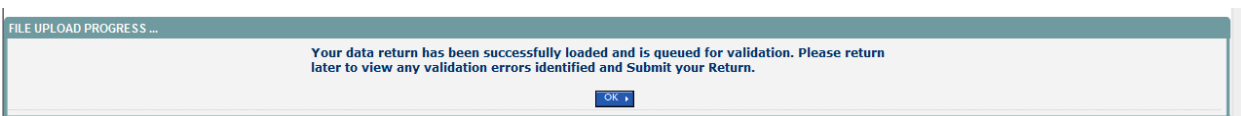


A progress message may be displayed while the upload is taking place.

Uploading School1.xml



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



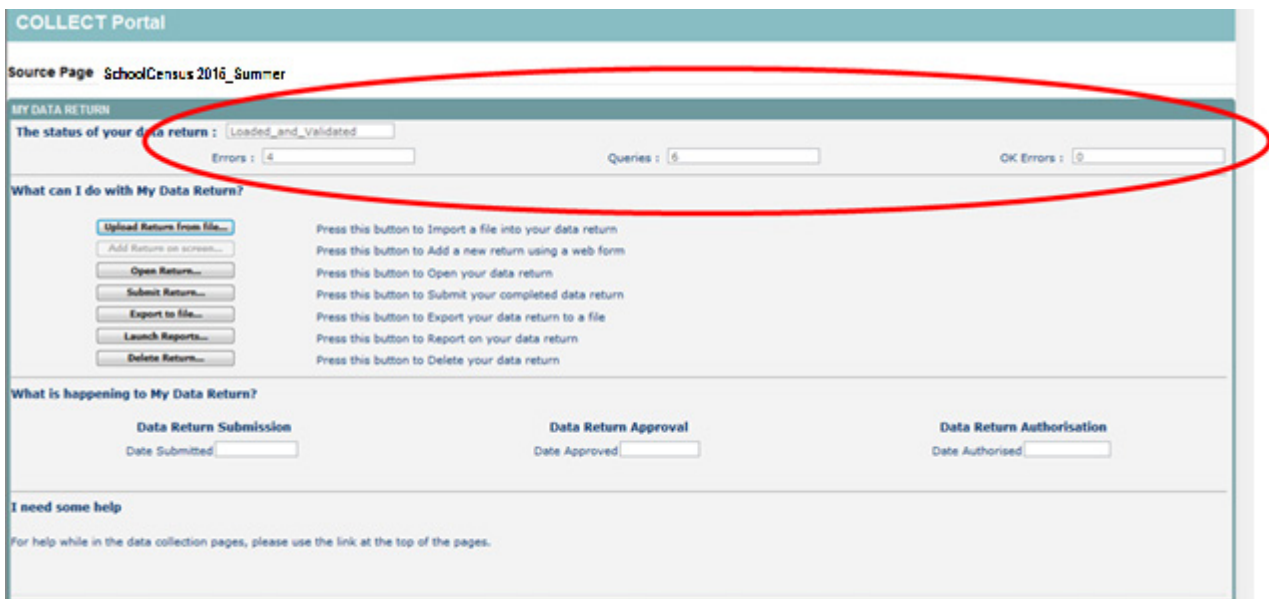
This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

4) Press the 'OK' button to return to the source 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.

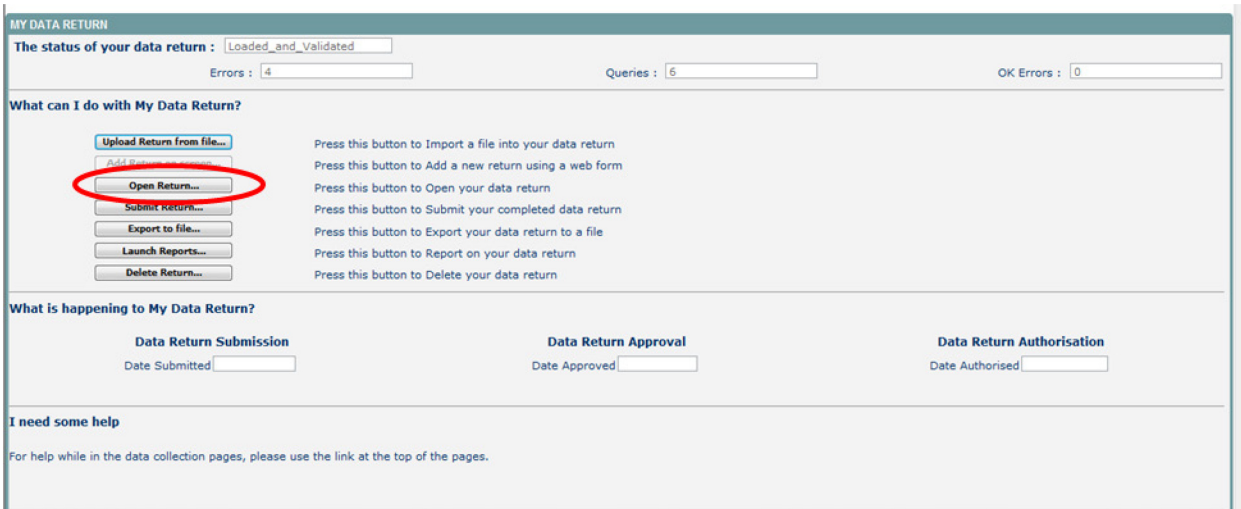
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

Once the return has been validated, the return status section on the source main page will display 'Loaded and Validated'. The total number of errors and queries found in the return will also be displayed.



Viewing the return details

1) To view your data return click on 'Open Return'.



Your return will then be displayed

SC15 Summer

[All Errors](#)
[All Notes](#)
[Add](#)
[View](#)
[Edit](#)
[Delete](#)
[Status](#)

SC15 Summer - TDU Test Secondary 1					
Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		0	13	0	
Data Item	Value	Errors		OK Errors	History
School Census Summer 2015					
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-05-21	34	40	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Estab	4001	0	0	0	
Software Code	XLTemplate1.3	0	0	0	
Release	1.00 SC - SUM	0	0	0	
Xversion	1.0	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-03-16 14:07:51	0	0	0	
School		View All			
Pupils on Roll		View All			
Pupils No Longer on Roll		View All			

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

School	View All
Pupils on Roll	View All
Pupils No Longer on Roll	View All

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)	Surname			OT Birth							
UPN	Surname	Forename	DOB	Pupil Enrolment Status	Pupil Errors	Address	Termly Sessions	Summer Sessions	Annual Sessions	Exclusions	Pos

Editing data within the return

- 1) To edit the details click on the 'Edit' button.

COLLECT Portal

IC15 Summer

All Errors All Notes [Print] [View] **Edit** [Cancel] [Refresh]

SC15 Summer [67]

- Levels
- School [395]
 - Characteristics
 - ChildCare [7]
 - Pupil On Roll [391]
 - Characteristics
 - Identifiers
 - Status
 - Termly Attendance
 - Termly Exclusions [160]
 - Termly Session Details
 - Addresses [50]
 - Learner Support [20]
 - Free School Meals Period [110]
 - Pupils No Longer On Roll [19]
 - Characteristics
 - Identifiers
 - Status
 - Termly Attendance
 - Termly Exclusions [15]
 - Termly Session Details
 - Learner Support [2]

SC15 Summer - TDU Test Secondary 1

Return Level Errors		Errors		OK Errors	Return Level Notes
		E	G		
		0	13	0	

Data Item	Value	Errors		OK Errors	History
		E	G		
School Census Summer 2015					
Collectors	SC	0	0	0	
Term	SCM	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-05-21	04	02	0	
Source Level	3	0	0	0	
LA	520	1	0	0	
Estab	6501	0	0	0	
Software Code	NL Template 1.3	0	0	0	
Release	1.00 SC - SUM	0	0	0	
Version	1.0	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-05-16 14:07:51	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

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

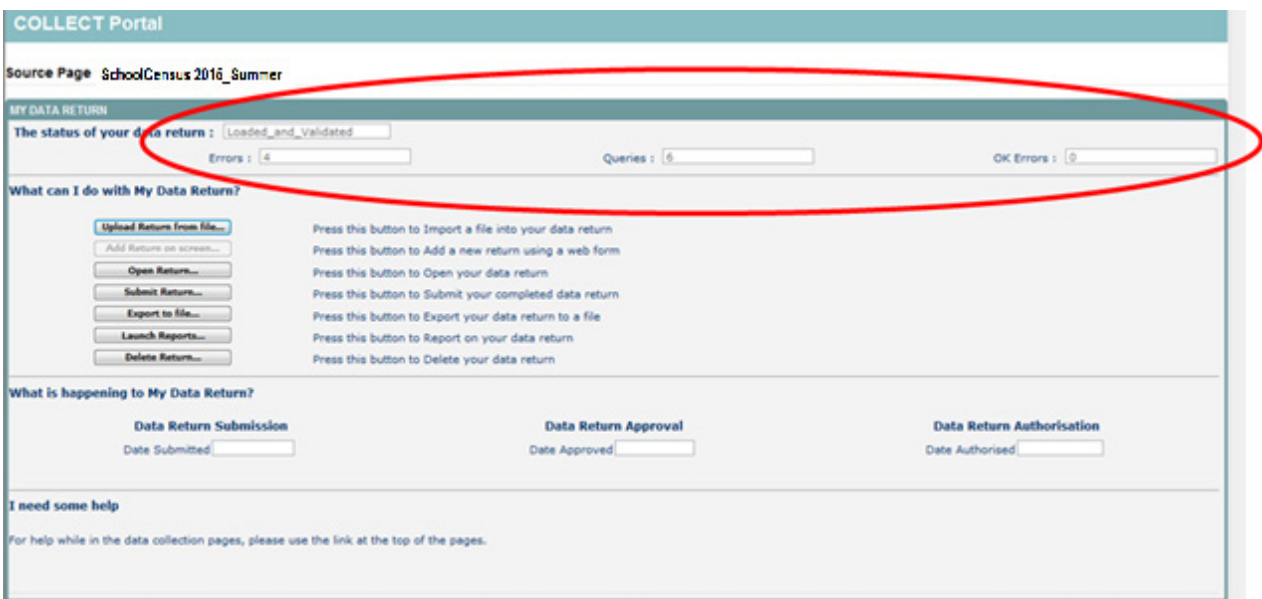
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

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.



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 2015_Summer

TDU Test Secondary 1 Error report on 30/04/2015 at 14:03

Rule No.	Error Message	Details	Notes	Field	Value
1840	Pupil aged 5 or over with Language missing or invalid	Details		DOB	Aug 31 2000 12:00AM
1840	Pupil aged 5 or over with Language missing or invalid	Details		Governance	CO - Community
1840	Pupil aged 5 or over with Language missing or invalid	Details		Intake	COMP - Comprehensive
1840	Pupil aged 5 or over with Language missing or invalid	Details		language	null
1840	Pupil aged 5 or over with Language missing or invalid	Details		Phase	SS - Secondary (including CTCs and Academies)
1840	Pupil aged 5 or over with Language missing or invalid	Details		ReferenceDate	May 21 2015 12:00AM

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Rule No.	Error Message	Details	Notes
1881Q	Please check entry date. Sessions possible indicate the pupil attended school during the term prior to this date.If the pupil left & was subsequently readmitted,the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Details	
1881Q	Please check entry date. Sessions possible indicate the pupil attended school during the term prior to this date.If the pupil left & was subsequently readmitted,the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Details	
1881Q	Please check entry date. Sessions possible indicate the pupil attended school during the term prior to this date.If the pupil left & was subsequently readmitted,the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Details	
1881Q	Please check entry date. Sessions possible indicate the pupil attended school during the term prior to this date.If the pupil left & was subsequently readmitted,the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Details	

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

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) Correct in your MIS and re-load the 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 you reflect this change in the MIS**

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 you for further information.

Please note from summer 2015 it will only be possible to complete 'return level' notes. 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 'SC15 Summer' interface. At the top, there are buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. Below this is a navigation tree on the left with categories like 'Levels', 'School [395]', 'Pupil On Roll [392]', and 'Pupils No Longer On Roll [19]'. The main area displays a table titled 'SC15 Summer - TDU Test Secondary 1'. The table has columns for 'Data Item', 'Value', 'Errors' (subdivided into 'E' and 'Q'), 'OK Errors', and 'Return Level Notes'. A red circle highlights the pen icon in the 'Return Level Notes' column for the 'Reference Date' row. Below the table, there are links for 'View All' for 'Pupils on Roll' and 'Pupils No Longer on Roll'.

Data Item	Value	Errors		OK Errors	Return Level Notes
		E	Q		
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-05-21	34	40	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Estab	4001	0	0	0	
Software Code	XLTemplate1.3	0	0	0	
Release	1.00 SC - SUM	0	0	0	
Xversion	1.0	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-03-16 14:07:51	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

Click add new note

The screenshot shows a dialog box titled 'Add New Note'. It has a 'Note Detail' section with a text area. Below this is a section for 'Preserved notes deleted by resubmissions' with a table header: 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. There is a 'Remove Preserved Note' button. A red circle highlights the 'Add New Note' button.

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



Please ensure there is a note for all queries/errors remaining on your 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

Submitting the return

The school is responsible for 'submitting' the return once the data has been checked and any explanatory notes have been added.

To 'Submit' your return:

- 1) Go to the 'source main screen' and click on 'Submit Return'.

The screenshot shows the 'MY DATA RETURN' interface. At the top, the status is 'Loaded_and_Validated'. Below this, there are fields for 'Errors', 'Queries', and 'OK Errors'. The main section is titled 'What can I do with My Data Return?' and contains several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...'. The 'Submit Return...' button is highlighted with a red circle. Below this section, there are three columns: 'Data Return Submission' with a 'Date Submitted' field, 'Data Return Approval' with a 'Date Approved' field, and 'Data Return Authorisation' with a 'Date Authorised' field. At the bottom, there is a 'I need some help' section with a link to help pages.

The screen will be updated

- The status of the return will be set to '**Submitted**' and the '**Date submitted**' will be completed
- The **submit** button will now be disabled for this return

The screenshot shows the 'MY DATA RETURN' interface after the return has been submitted. The status is now 'Submitted', which is highlighted with a red circle. The 'Submit Return...' button is now disabled. The 'Date Submitted' field is filled with '23/08/2013', which is also highlighted with a red circle. The other fields and sections remain the same as in the previous screenshot.

Reports

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

MY DATA RETURN

The status of your data return : Submitted

Errors : 4 Queries : 5 OK Errors : 0

What can I do with My Data Return?

- Upload Return from file... Press this button to Import a file into your data return
- Add Return on screen... Press this button to Add a new return using a web form
- Open Return... Press this button to Open your data return
- Submit Returns... Press this button to Submit your completed data return
- Export to file... Press this button to Export your data return to a file
- Launch Reports...** Press this button to Report on your data return
- Delete returns... Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted: 23/05/2013	Date Approved:	Date Authorised:

I need some help

For help while in the data collection pages, please use the link at the top of the pages.

2) 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 school as each pupil is funded only once.

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

[school census 2015](#)

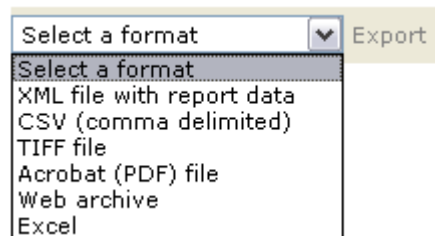
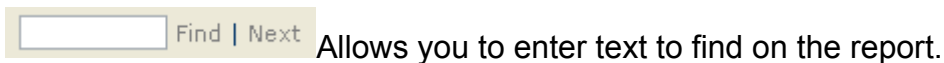
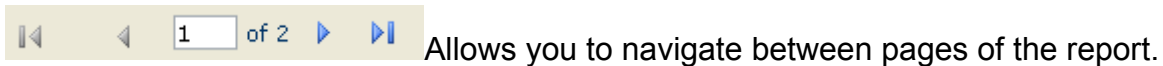
2) Select the report you wish to run and click launch report.

Viewing your report

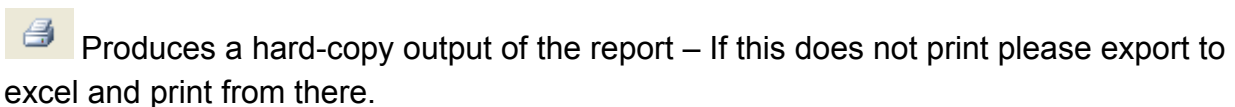
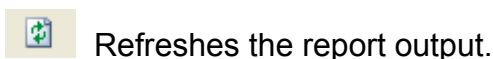
Once you have launched your report you will be able to view on screen. Along the top of the report you will see a toolbar with various functions



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.



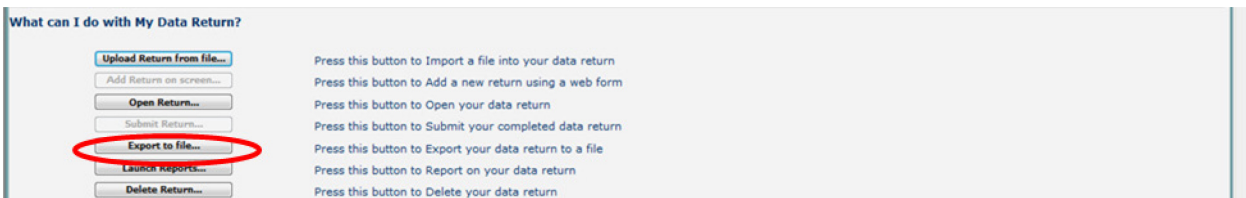
Exporting a return

A return can be exported in XML or CSV format

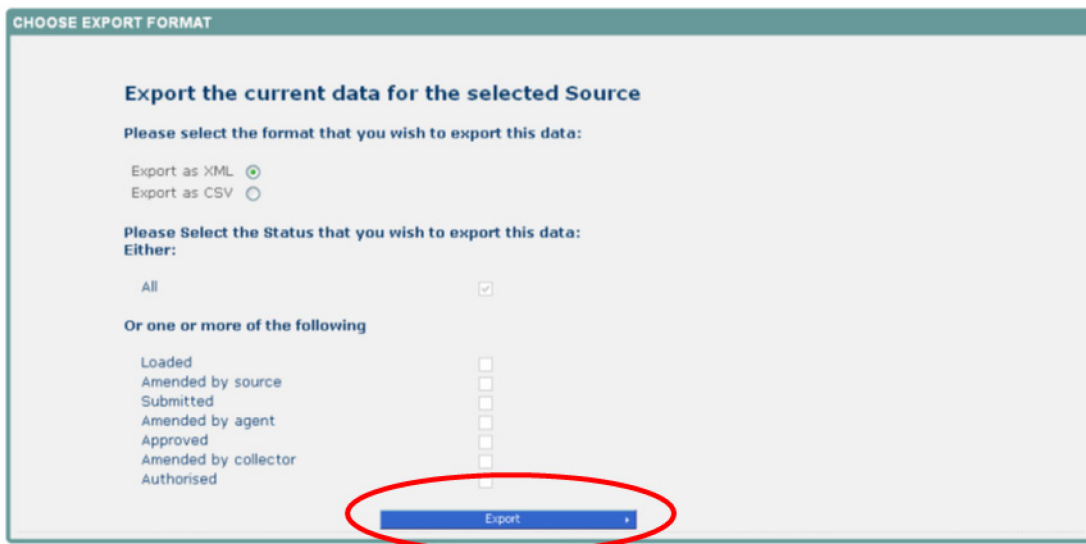
Exporting a return (current state)

On the **source page**

- 1) Click on 'Export to file'

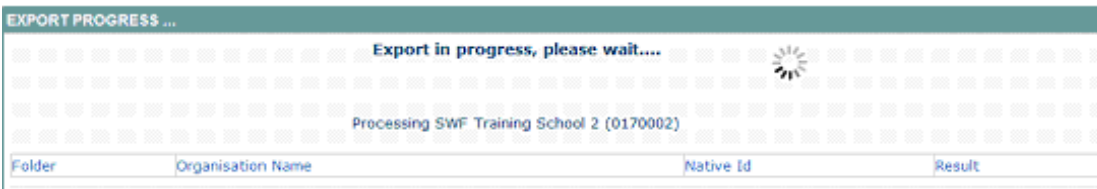


- 2) Choose to export in either XML or CSV format, then click on the **export** button.

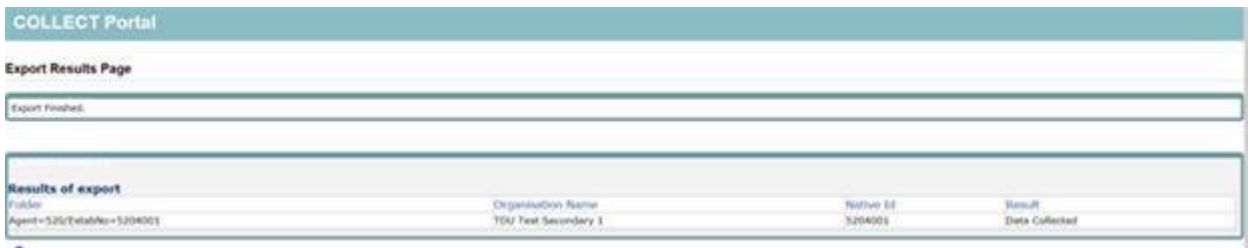


- 3) A progress message will be displayed

Exporting (Processed 0 of 1)



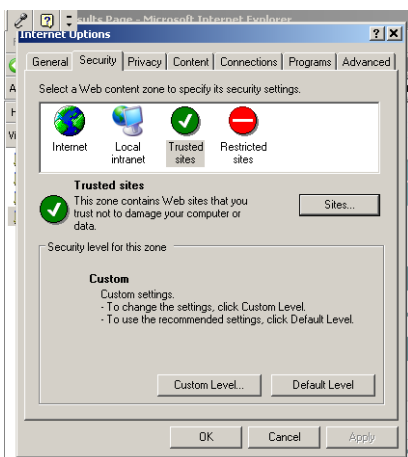
- 4) When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



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' dialogue 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.



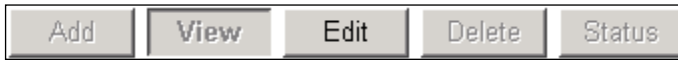
Navigation controls

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, eg 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 have any queries regarding school census or have a change to your contact details please could you complete a [Service Request form](#)



Department
for Education

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