



Department
for Education

School census 2015

COLLECT guide for maintained schools

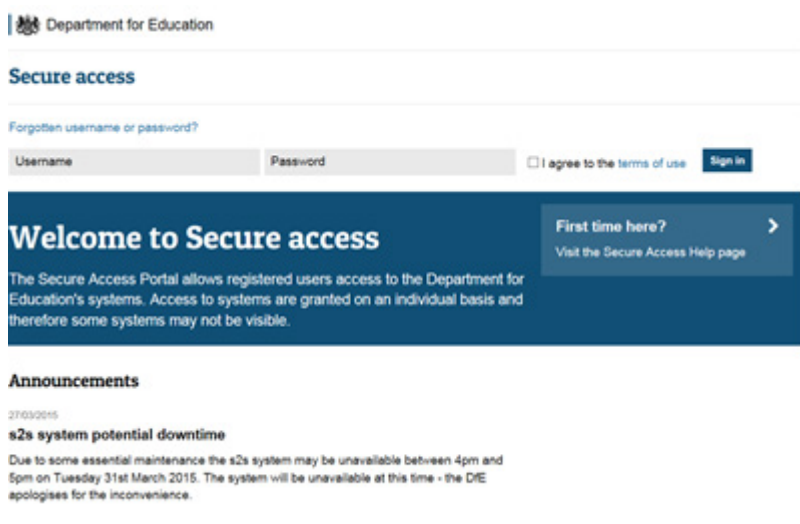
May 2015

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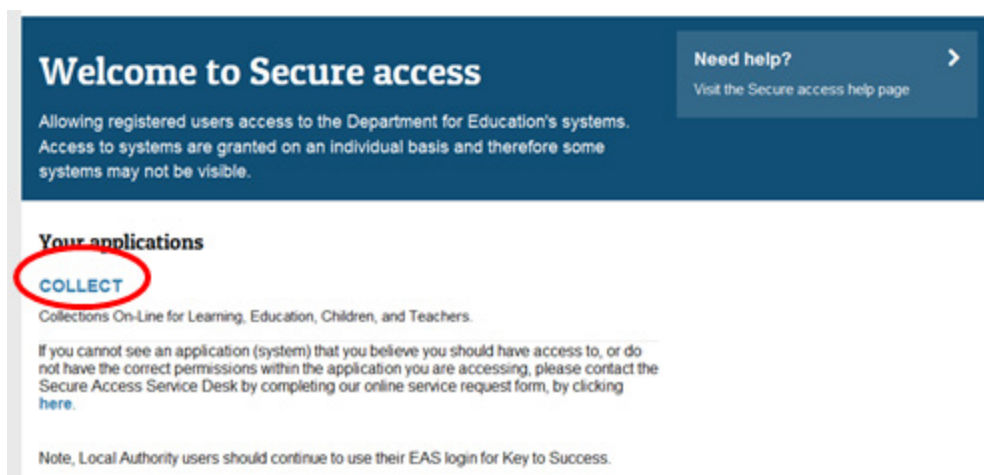
COLLECT and secure access

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.

COLLECT Portal

Collect Welcome

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

PROCEED INTO COLLECT
Continue...

Complete Conduct
Show Code of Conduct Text...

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

MY DATA COLLECTIONS

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?

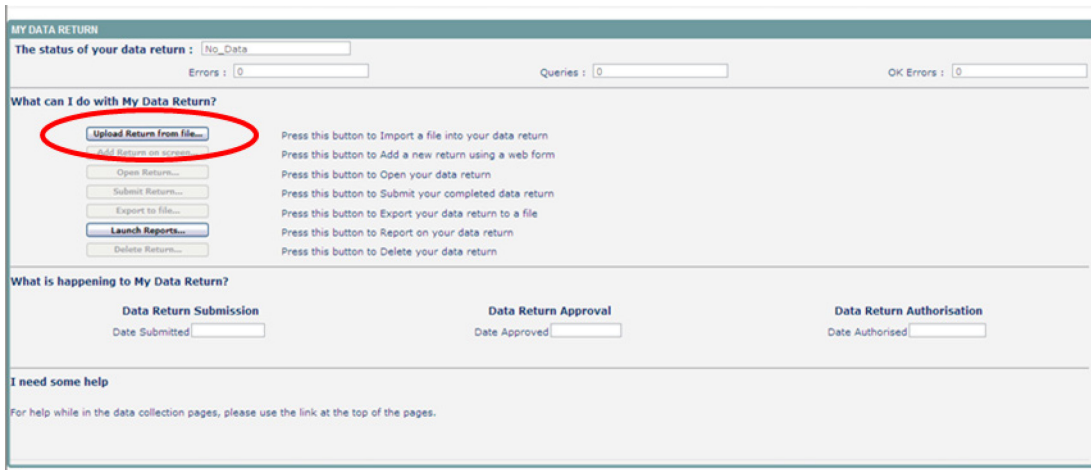
Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

I need some help

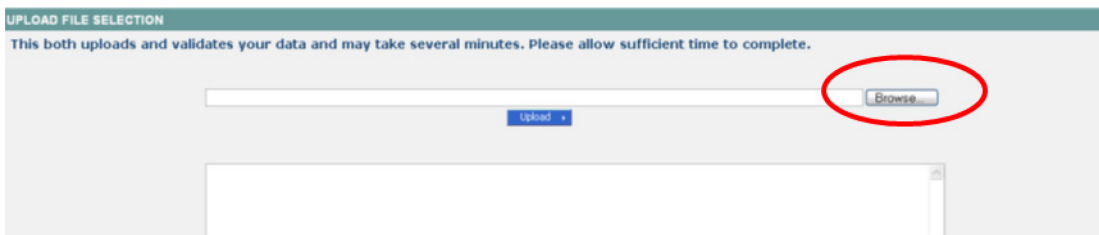
For help while in the data collection pages, please use the link at the top of the pages.

Loading a return

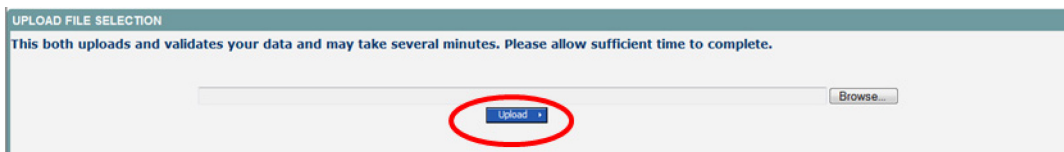
1) Click on 'Upload return from file'



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.

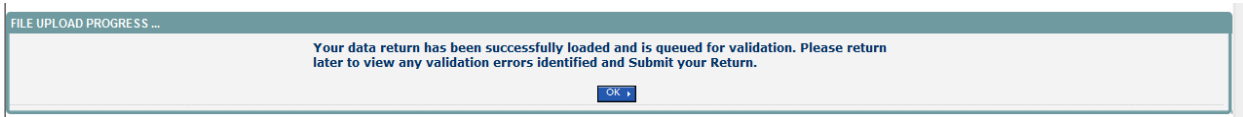


A progress message may be displayed while the upload is taking place.

Uploading School1.xml



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



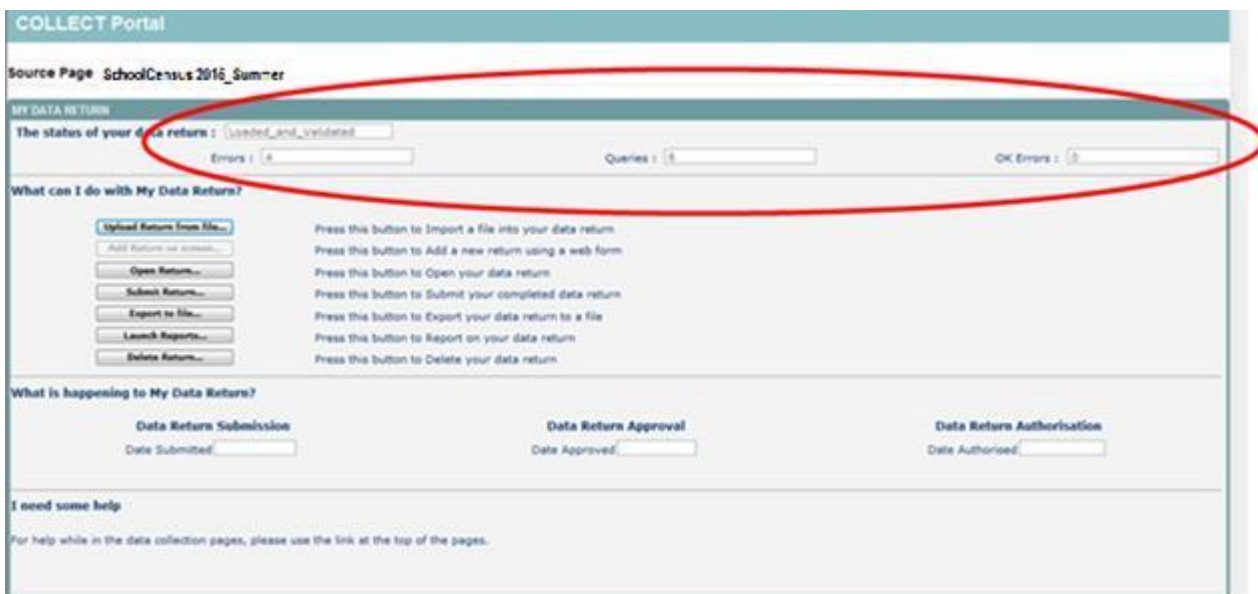
This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

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.

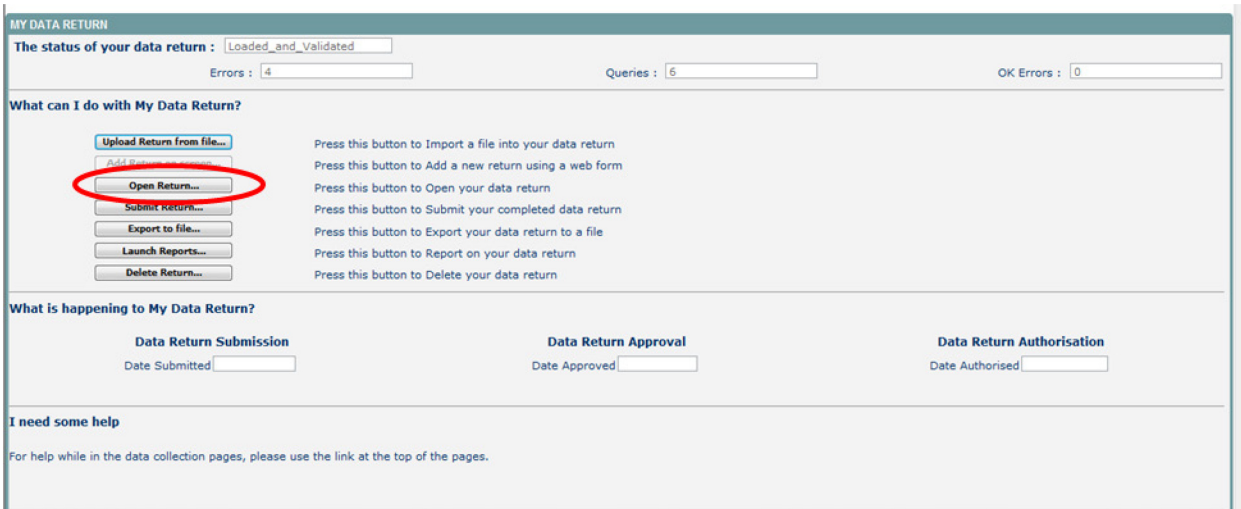
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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.

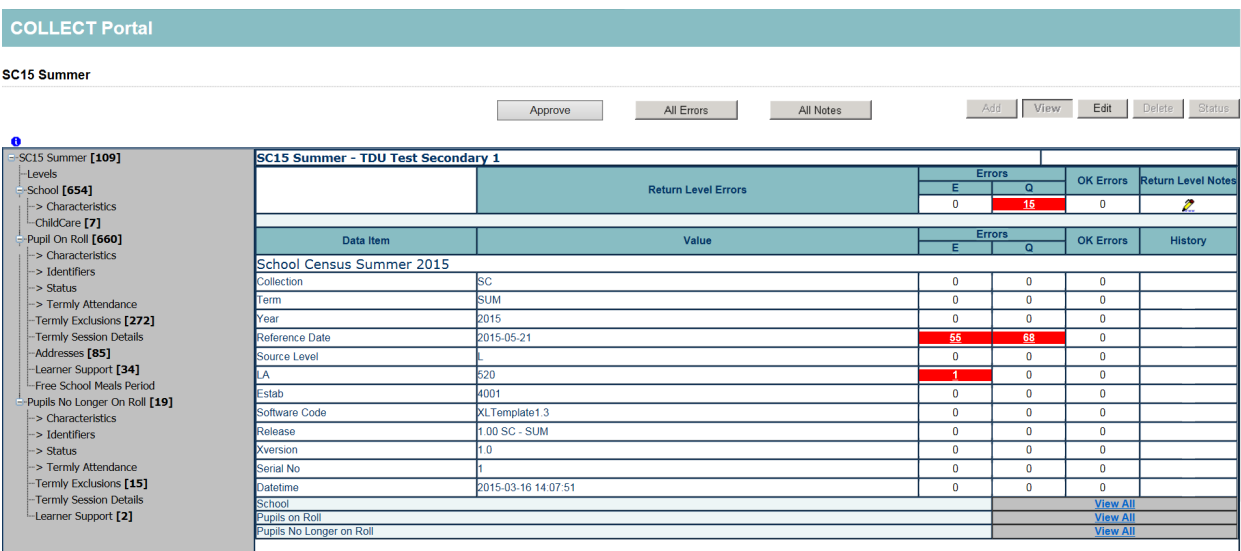


Viewing the return details

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



Your return will then be displayed



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



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.



New: Editing data within the return

The default view when a screen is displayed is 'View' mode. We have enabled editing at school level for all school census returns.

Please consult with your local authority regarding editing of your return to agree local responsibilities and/or processes for amending data directly in COLLECT.

To edit the details click on the 'Edit' button

COLLECT Portal

SC15 Summer

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

SC15 Summer [109]

- Levels
 - School [654]
 - Characteristics
 - ChildCare [7]
 - Pupil On Roll [660]
 - Characteristics
 - Identifiers
 - Status
 - Termly Attendance
 - Termly Exclusions [272]
 - Termly Session Details
 - Addresses [85]
 - Learner Support [34]
 - Free School Meals Period
 - 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	Q		
		0	15	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Summer 2015					
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-05-21	65	68	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

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

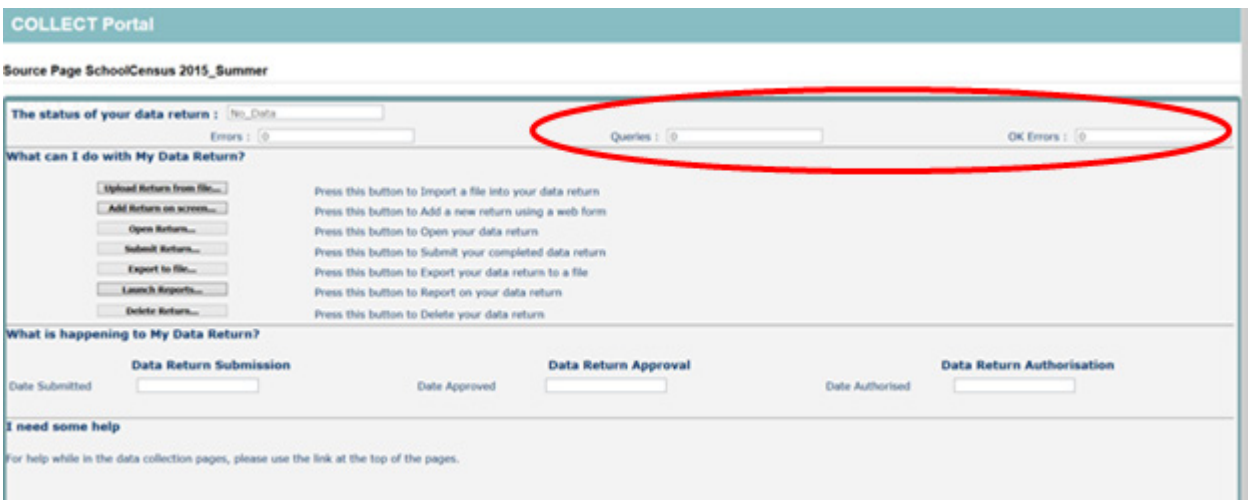
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

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	

The table shows a summary of errors. The 'Return Level Errors' section has 0 Errors (E) and 6 Queries (Q). The 'OK Errors' column shows 0. There is a help icon in the 'Return Level Notes' column.

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.

COLLECT Portal

Blade Error Report - SchoolCensus 2015_Summer

TDU Test Secondary 1 **Error report on 01/05/2015 at 09:59** **Count 2145** **Details**

Roll No.	Return Level	Error Message	Priority	OK'd	Notes	Count	Details
1540		Pupil aged 5 or over with language missing or invalid	Errors	Details		X	EntryDate: Jun 12 2015 12:00AM Governance: SOU - Community Intake: SCMP - Comprehensive Phase: SS - Secondary (including ILE's and Academies) ReferenceDate: May 21 2015 12:00AM SessionsPossible: 02
1540		Pupil aged 5 or over with language missing or invalid	Errors	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	
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.	Queries	Details		X	

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) **If your local authority agrees** - 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 data collection helpdesk will have to contact you for further information.

Return level notes are not overwritten if a resubmission is made.

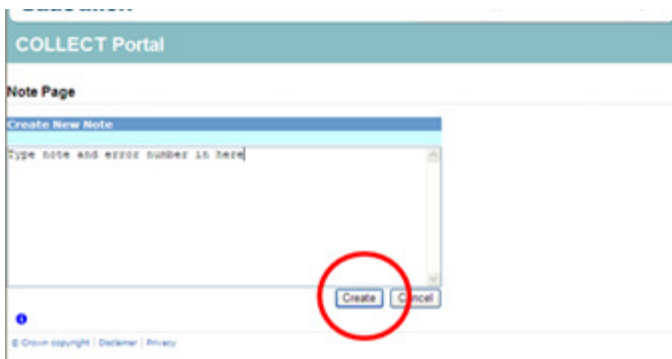
- 1) To add a return level note double click on the pen icon in the return level notes section.

The screenshot shows the COLLECT Portal interface for 'SC15 Summer'. It features a navigation menu on the left and a main data table. The table is titled 'Return Level Errors' and has columns for 'Data Item', 'Value', 'Errors' (subdivided into 'E' and 'Q'), and 'OK Errors'. A 'History' column is also present, containing a pen icon which is circled in red. 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'. The 'Errors' column shows values like 0, 1, 106, and 138.

- 2) Click add new note

The screenshot shows a dialog box for adding a new note. It has a title bar with 'Add New Note' and 'Remove Note' buttons. The 'Add New Note' button is circled in red. Below the title bar is a large text area for entering the note. At the bottom, there is a section for 'Preserved notes deleted by resubmissions' with 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.



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 : 4', 'Queries : 6', and 'OK Errors : 0'. 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 section titled 'I need some help' with a link to help pages.

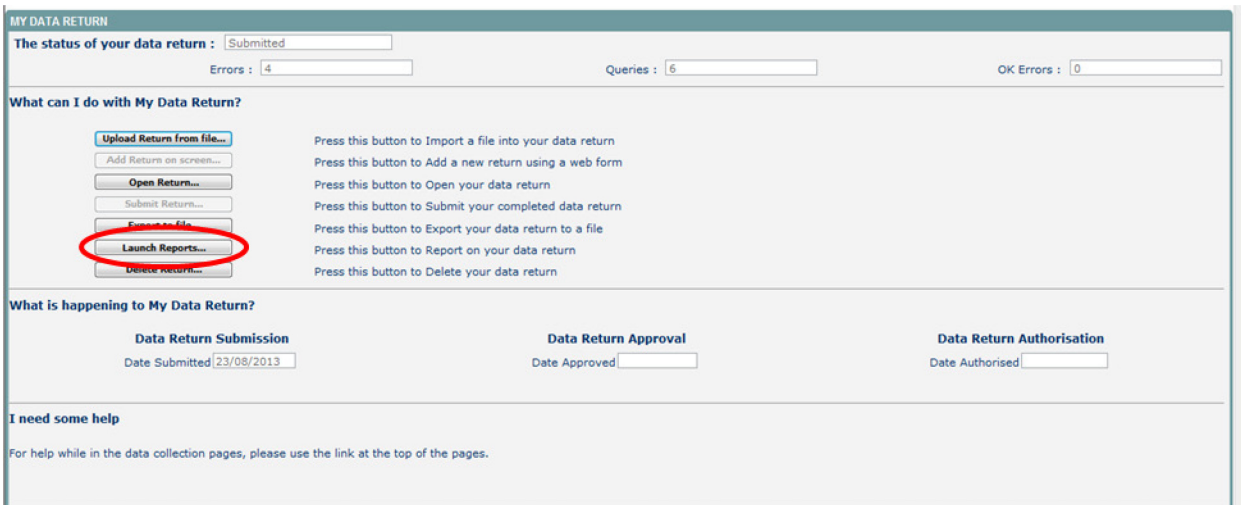
The screen will be updated

- 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 'Data Return Submission' section now shows 'Date Submitted' as '23/08/2013', which is also highlighted with a red circle. The other 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.



A drop down menu will be display and a report can be selected from that drop down list
Your local authority will usually run these reports and consult you on any queries they bring up.

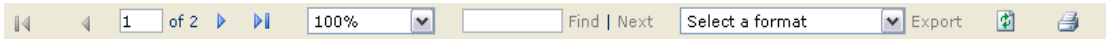
There will be individual user guides for reports available on the education website.

[School Census 2015](#)

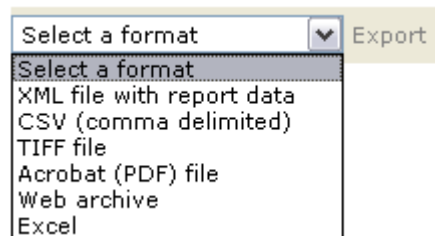
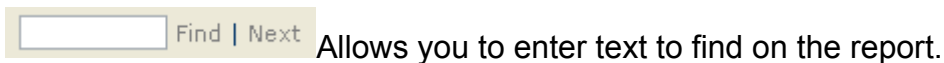
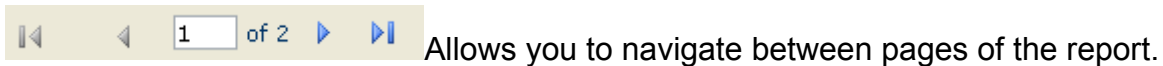
2) Select the report you wish to run and click launch report.

Viewing your report

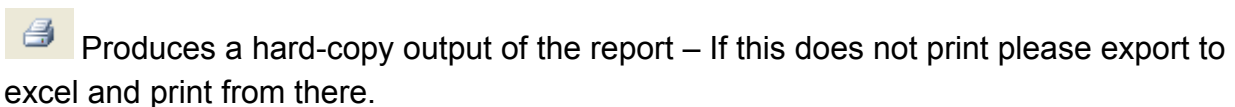
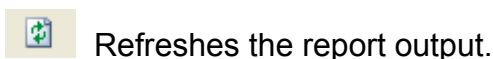
Once you have launched your report you will be able to view on screen. Along the top of the report you will see a toolbar with various functions.



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.



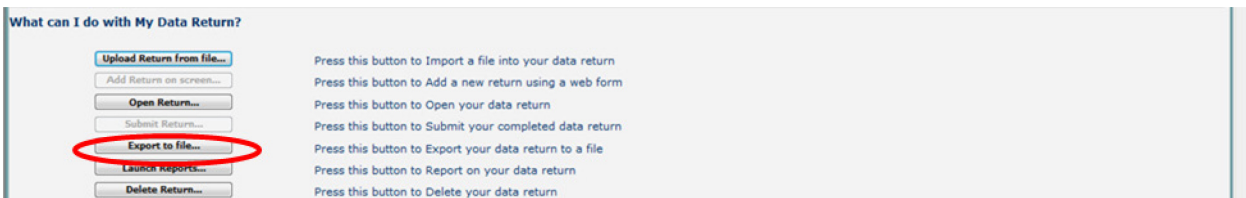
Exporting a return

A return can be exported in XML or CSV format

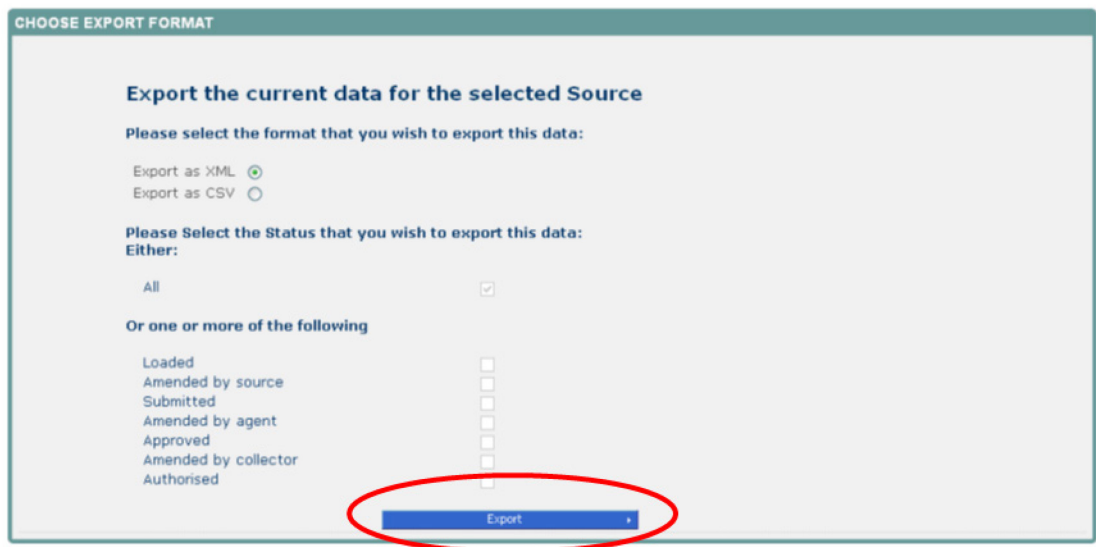
Exporting a return (current state)

On the **source page**

- 1) Click on 'Export to file'



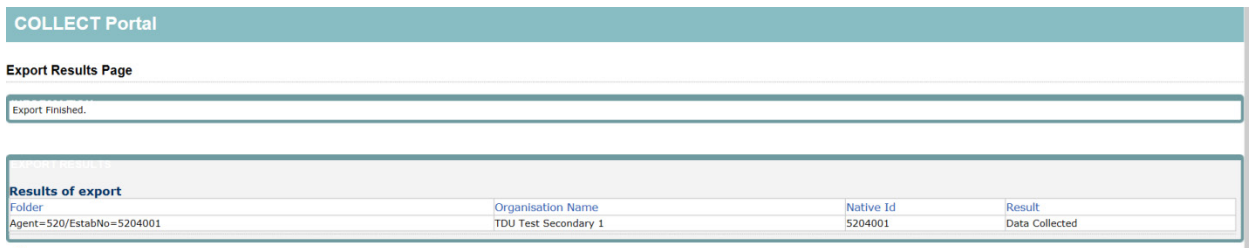
- 2) Choose to export in either XML or CSV format, then click on the 'Export' button.



- 3) A progress message will be displayed



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.



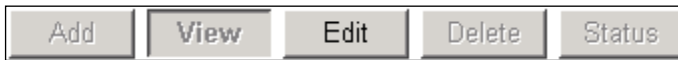
Navigation controls

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

Help

If you have any queries regarding school census in the first instance please contact your local authority.



Department
for Education

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