



Department  
for Education

# **School census 2015**

**COLLECT guide – maintained schools**

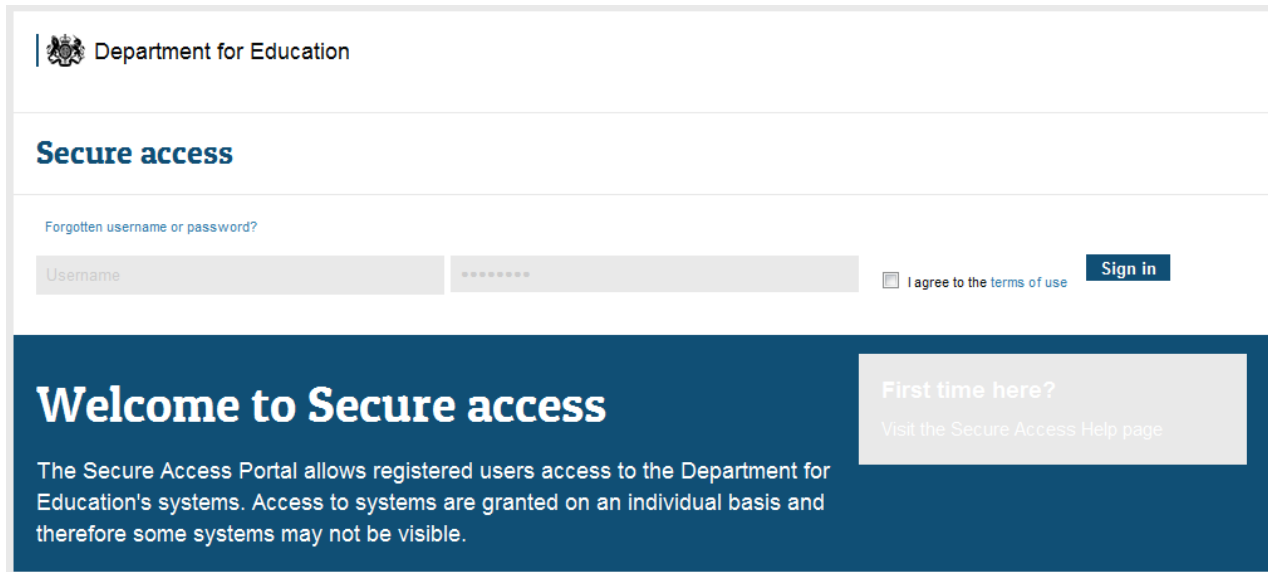
**October 2015**

# Contents

COLLECT and secure access	3
Source	5
Loading a return	6
Viewing the return details	8
New: Editing data within the return	9
Errors	10
Total return errors	10
Return level errors	10
To view all errors and queries on the return	11
Correcting errors	11
Providing clarification/ supplementary information	12
Submitting the return	14
Reports	15
Exporting a return	17
Screen functionality	19
Screen navigation	19
Navigation controls	19
Mode buttons	19
Help	21

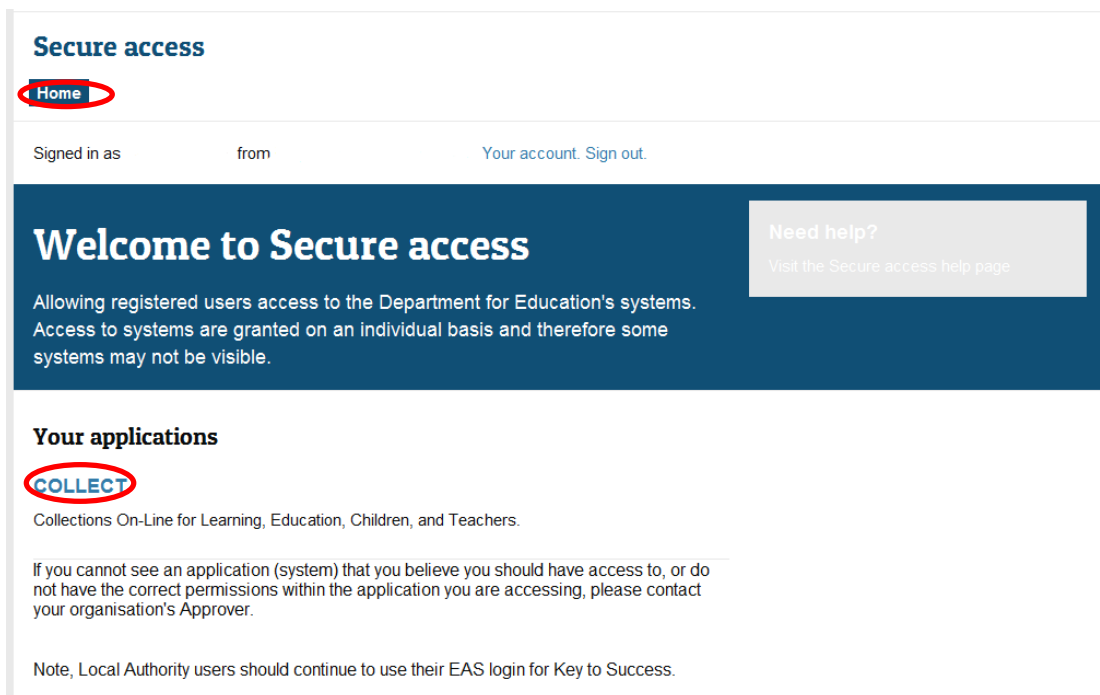
# COLLECT and secure access

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.



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

PROCEED INTO COLLECT

Continue...

Code of 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.

Home Page

MY DATA COLLECTIONS

<a href="#">Data Collection</a>	<a href="#">User Role</a>	<a href="#">Organisation</a>	<a href="#">Status</a>	<a href="#">Due Date</a>	<a href="#">Days Due</a>
SchoolCensus 2015_Autumn	Agent	XXX	Testing	01/10/2015 00:00:00	36

Select Data Collection

# 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?**

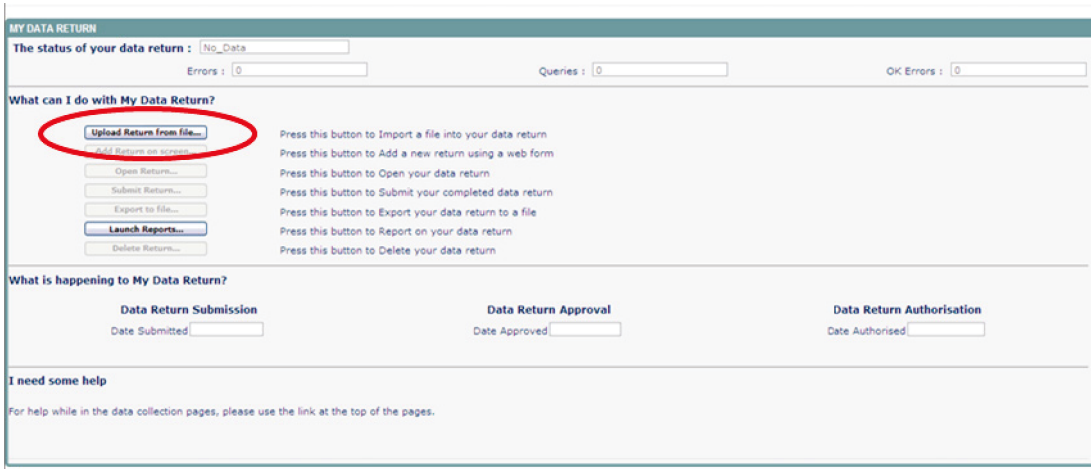
<b>Data Return Submission</b>	<b>Data Return Approval</b>	<b>Data Return Authorisation</b>
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

**I need some help**

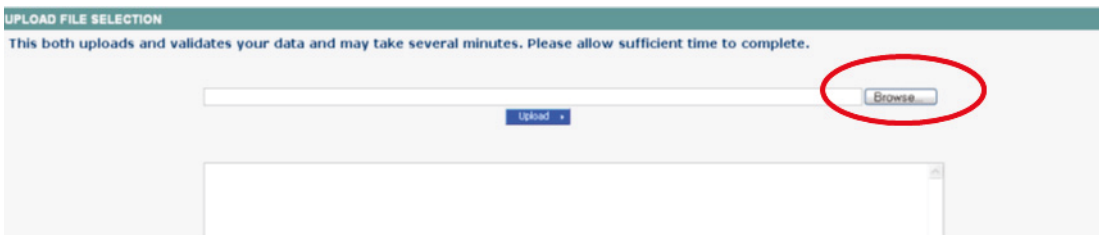
For help while in the data collection pages, please use the link at the top of the pages.

# Loading a return

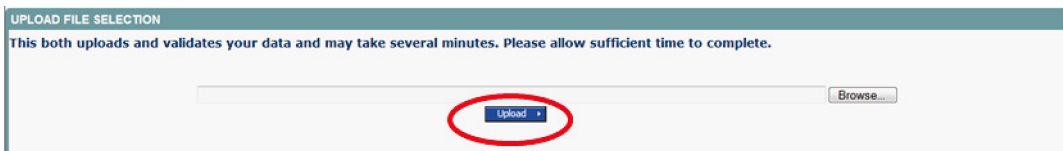
1) Click on 'Upload return from file'



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.

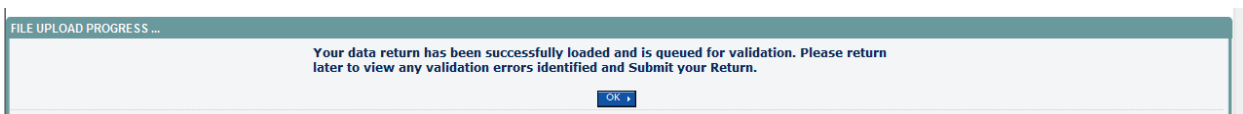


A progress message may be displayed while the upload is taking place.

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.

**COLLECT Portal**

Source Page SchoolCensus 2015\_Autumn

**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?

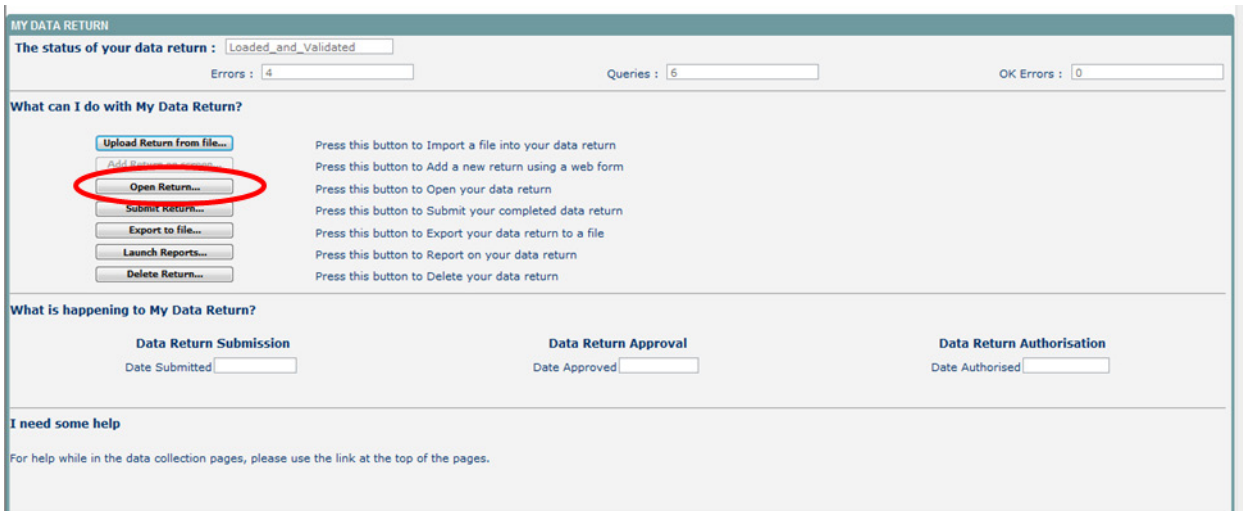
<b>Data Return Submission</b> Date Submitted: <input type="text"/>	<b>Data Return Approval</b> Date Approved: <input type="text"/>	<b>Data Return Authorisation</b> Date Authorised: <input type="text"/>
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**I need some help**

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

# Viewing the return details

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



Your return will then be displayed

The screenshot shows the 'SC15 Autumn' data return details page. At the top, there are buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. Below this is a table with the following columns: 'Data Item', 'Value', 'Errors', 'OK Errors', and 'Return Level Notes'. The 'Errors' column is further divided into 'E' and 'Q'. The table contains the following data:

Data Item	Value	Errors		OK Errors	Return Level Notes
		E	Q		
School Census Autumn 2015		0	0	0	
Collection	SC	0	0	0	
Term	AUT	1	0	0	
Year	2015	0	0	0	
Reference Date	2015-10-01	0	0	0	
Source Level	S	0	0	0	
LA	001	1	0	0	
Estab	4001	0	0	0	
Software Code	CCS-SIMS	0	0	0	
Release	7.159.3.62.172	0	0	0	
Xversion		0	0	0	
Serial No	4	0	0	0	
Datetime	2014-11-14 15:35:10	0	0	0	

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	Surname Forename	DOB	Pupil Enrolment Status	Pupil Errors	Address	Termly Sessions	Summer Sessions	Annual Sessions	Exclusions	Post 16	FSM
-----	------------------	-----	------------------------	--------------	---------	-----------------	-----------------	-----------------	------------	---------	-----



# 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.**

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

The screenshot shows the 'SC15 Autumn' return details in the COLLECT software. The 'Edit' button is circled in red. The interface includes a sidebar with a tree view of data categories, a main table of data items, and a summary table of errors.

Data Item	Value	Errors		OK Errors	Return Level Notes
		E	Q		
School Census Autumn 2015		0	0	0	
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-10-01	12	0	0	
Source Level	S	0	0	0	
LA	520	1	0	0	
Estab	1001	1	0	0	
Software Code	CCS-SIMS	0	0	0	
Release	7.159.3.62.172	0	0	0	
Version		0	0	0	
Serial No	5	0	0	0	
Datetime	2014-11-14 15:35:10	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.

The screenshot shows the 'COLLECT Portal' interface. Under the 'MY DATA RETURN' section, the status is 'Loaded\_and\_Validated'. A red oval highlights the summary area which includes: Errors: 6, Queries: 6, and OK Errors: 0. Below this, there are buttons for 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...', each with a brief description of its function. Further down, there are sections for 'Data Return Submission', 'Data Return Approval', and 'Data Return Authorisation', each with a date field. At the bottom, there is a 'I need some help' section with a link to help pages.

## 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\_Autumn

Test Organisation 70 Error report on 28/08/2015 at 09:25 Count 125

Blade No.	Return Level	Error Message	Priority	DKC	Details	Notes	Count	Field	Value
1880		Pupil's entry date to school missing or after Census date	Errors		<u>Details</u>		X	EntryDate	Null
1980		Pupil's entry date to school missing or after Census date	Errors		<u>Details</u>		X	ReferenceDate	Oct 1, 2015, 12:00AM
2795		For Pupils No Longer on Roll the Learning Aim Status must be 2 (Completed), 3 (Withdrawn) or 4 (Transferred)	Errors		<u>Details</u>		X		
1925Q		Pupil No Longer On Roll record should not be submitted if there is no attendance, exclusions, learner support dem or post-16 learning aims data for the required period.	Queries		<u>Details</u>		X		
		Invalid Code Value	Errors		<u>Details</u>		X		
2722		Discount Code is missing	Queries		<u>Details</u>		X		
2722		Discount Code is missing	Queries		<u>Details</u>		X		
2722		Discount Code is missing	Queries		<u>Details</u>		X		
2722		Discount Code is missing	Queries		<u>Details</u>		X		
150		School Type and Phase not consistent	Errors		<u>Details</u>		X		

Page 1 of 13 12345678910

## 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:

- 3) Correct in your MIS and re-load the school census file to COLLECT, overwriting the incorrect one.
- 4) **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 EDD helpdesk will have to contact your local authority for further information.

**It is only 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.

Return Level Errors		Errors		OK Errors		Return Level Notes	
E	Q	E	Q	E	Q		
0	12	0	0				

Data Item	Value	E	Q	OK Errors	History
School Census Autumn 2015					
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-10-01	0	0	0	
Source Level	S	0	0	0	
LA	520	1	0	0	
Estab	1001	1	0	0	
Software Code	CCS-SIMS	0	0	0	
Release	7.159.3.62.172	0	0	0	
Version		0	0	0	
Serial No	5	0	0	0	
Datetime	2014-11-14 15:35:10	0	0	0	

2) Click add new note

Note Detail

Preserved notes deleted by resubmissions

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

Preserved Note Detail

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.**

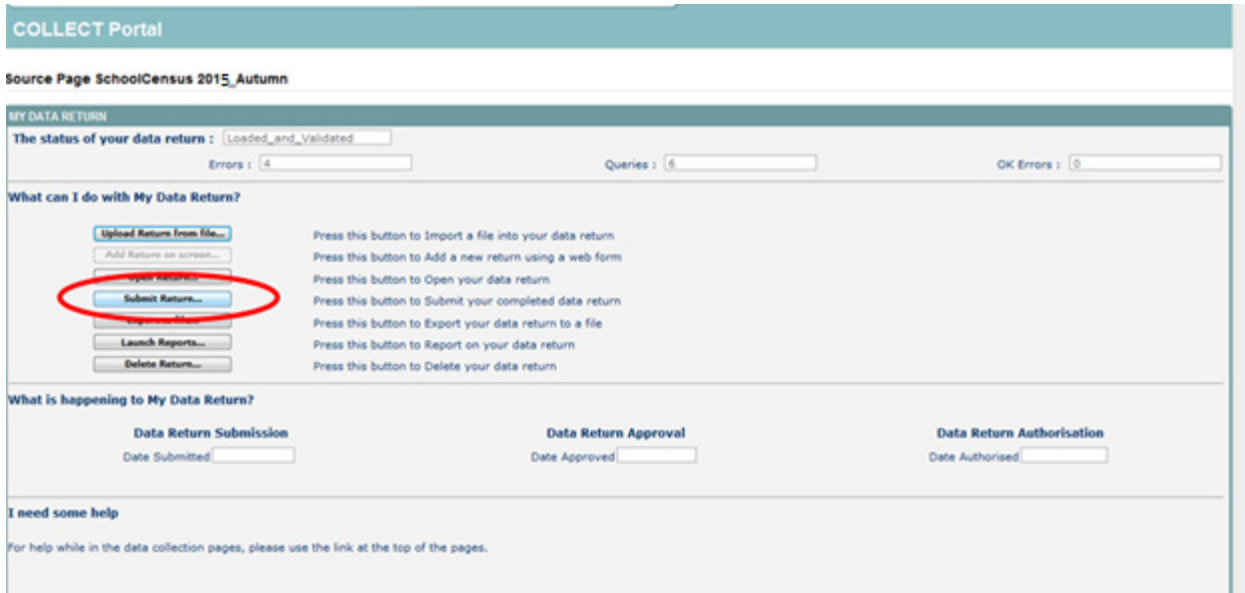
**E.g. – 3 x 2020Q – Confirmed correct, 1 x 1780Q – Confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in summer term**

# Submitting the return

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

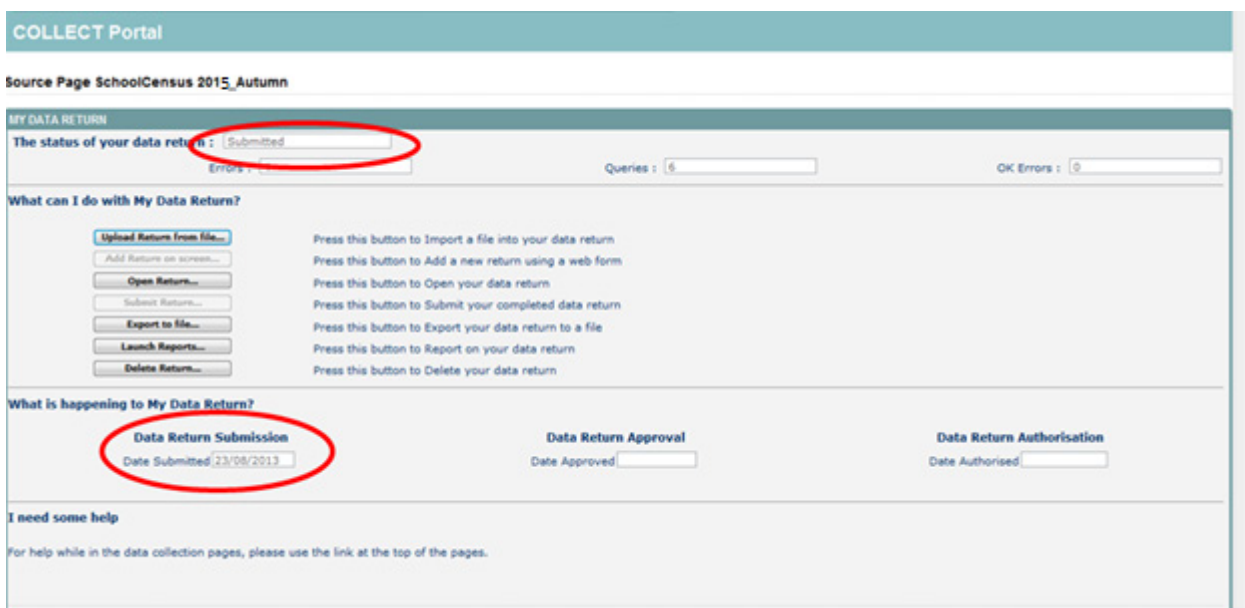
To 'Submit' your return:

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



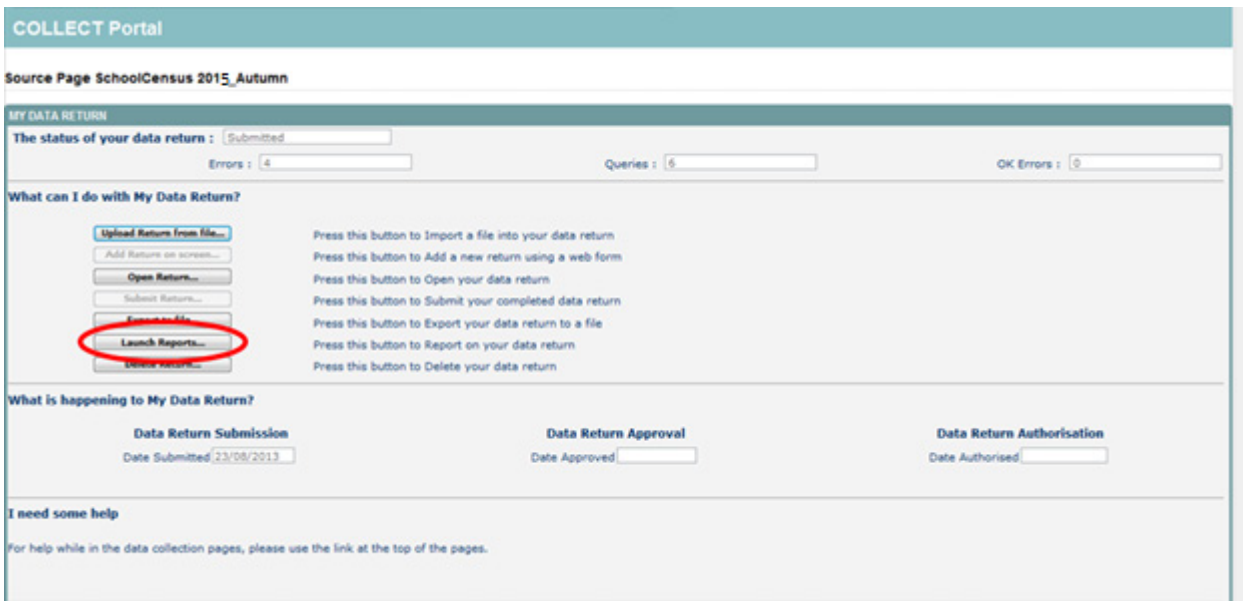
The screen will be updated

- 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



# 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

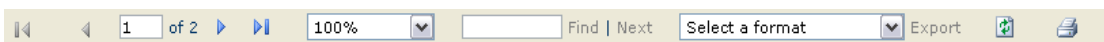
**Your local authority will usually run these reports and consult you on any queries they bring up.**

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

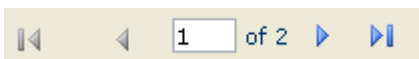
[school census 2015](#)

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

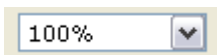
Along the top of the report you will see a toolbar with various functions.



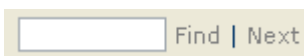
These are explained as follows.



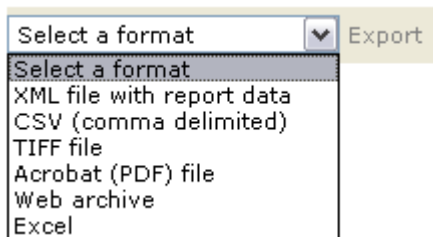
Allows you to navigate between pages of the report.



Zoom control for viewing the report at various zoom levels.



Allows you to enter text to find on the report.



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.



Refreshes the report output.



Produces a hard-copy output of the report – If this does not print please export to Excel and print from there.



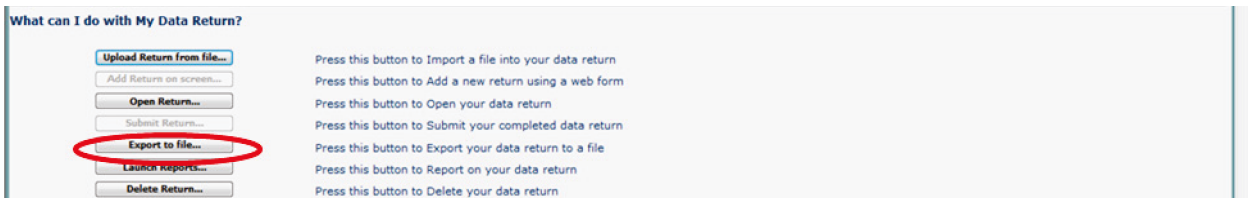
# Exporting a return

A return can be exported in xml or csv format

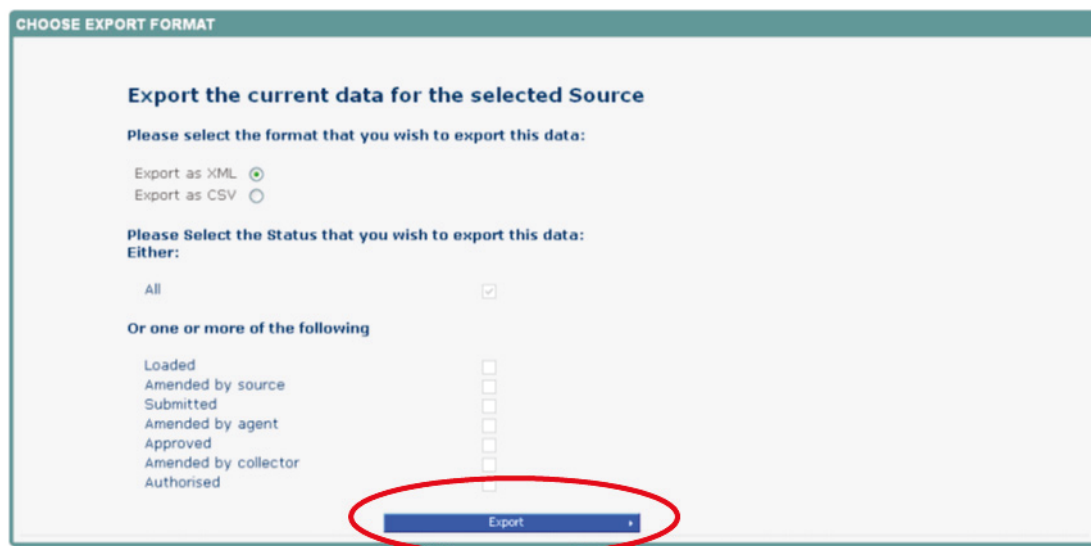
## Exporting a return (current state)

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



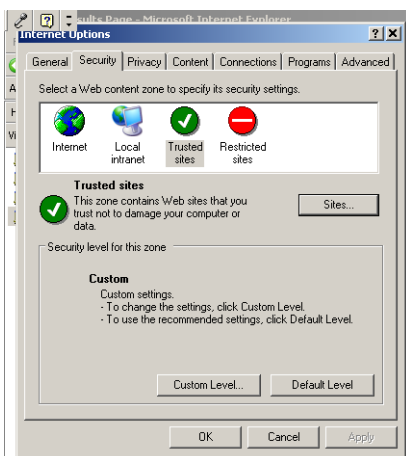
- 4) When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



**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

**Do not 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.



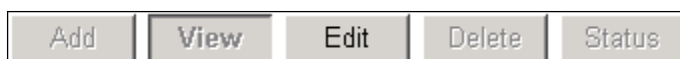
### Navigation controls

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



Department  
for Education

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