School workforce census 2015: COLLECT guide for academies

Instructions for academies, CTCs and free schools on how to use COLLECT to submit their data

September 2015

Contents

Introduction

The COLLECT (Collections Online for Learning, Education, Children and Teachers) Portal is used by schools, academies, local authorities and the Department for Education (DfE) for processing data collection returns. Major benefits of the portal include real time data collection monitoring and progress reporting, the ability of a local authority to view exactly the same information as DfE when queries arise and being a website there are no installation issues.

This document is designed to guide users through the various aspects of COLLECT as related to the school workforce census data return from initial submission, data validation and final approval by DfE.

The department now collects data from a wide range of users; generic terminology must be used within COLLECT. A provider of data is known as a 'source', and a 'collector' is the final destination of the information.

Secure Access (SA) and the COLLECT Portal

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

Secure access

Forgotten username or password?

| Username | Password | ☐ I agree to the terms of use | **Sign in** |

Welcome to Secure access

The Secure Access Portal allows registered users access to the Department for Education's systems. Access to systems are granted on an individual basis and therefore some systems may not be visible.

First time here? >
Visit the Secure Access Help page

Announcements

12/08/2015
Essential Maintenance Work

Due to essential maintenance required on the Secure Access servers, the system will be unavailable on **Friday 21st August at 5pm** for one hour to allow Eduserv to complete the work.

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

Welcome to Secure access

Allowing registered users access to the Department for Education's systems. Access to systems are granted on an individual basis and therefore some systems may not be visible.

Need help? >
Visit the Secure access help page

Your applications

COLLECT
Collections On-Line for Learning, Education, Children, and Teachers.

Once you have logged in you will see the link for COLLECT, click on this link highlighted below.

Click the continue button.

Then click on to **'Continue'** to enter COLLECT

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

Important notice for users of Internet Explorer older than version 6.0.
The Department is performing necessary maintenance work on its IT servers on the 25th July. As a result of this work customers using browsers older than IE 6.0 will no longer be able to access Departmental systems and should upgrade their browser to a more recent version. We apologise for any inconvenience this may cause.

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.

Scheduled Downtime
Please note: COLLECT will be unavailable from 17:00 to 17:30 on Tuesday 18th August for scheduled maintenance

PROCEED INTO COLLECT
Continue...
Code of Conduct

If you are bounced back to your homepage at this point please check that you are not trying to access the site from a link within an e-mail. Please copy and paste the address into the address bar then save it to your favourites.

Please follow the steps below to add the web addresses to your trusted sites

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**', Then select '**Add**' and type the following into the text box:

https://collectdata.education.gov.uk

Then select ok and ok. Please check that the secure access site is also in the trusted sites
The addresses should appear in the large box
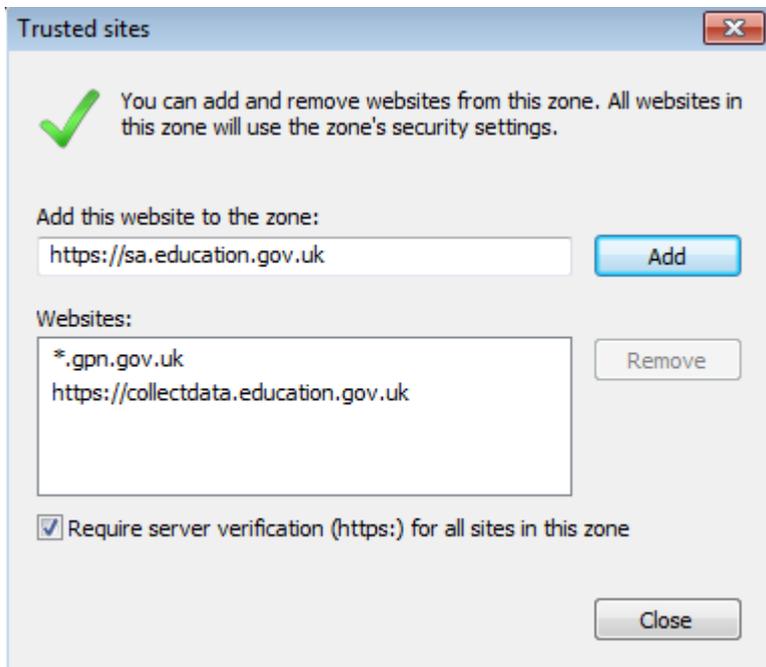
Source Page Screen

The Source main screen will be displayed

MY DATA COLLECTIONS					
Data Collection	**User Role**	**Organisation**	**Status**	**Due Date**	**Days Due**
SchoolWorkforceCensus2015	Source	Name of school	Open	Date census is due	

Select Data Collection ▶

Select the collection by clicking on the collection name to highlight it (if there is only one it will be automatically highlighted) and then click on the '**Select Data Collection'** button to open it.

The Source data return screen will be displayed

MY DATA RETURN

The status of your data return : No_Data

Errors : 0   Queries : 0   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 Return...	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
Run Matching	Press this button to match records from different souorces in your return
Resolve Matching	Press this button to manually match records from different sources in your return
Run Reconciliation	Press this button to automatically reconcile matched records
Resolve Reconciliation	Press this button to manually reconcile matched records
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	Date Approved	Date Authorised

The screen is divided into three main sections:

• Return Status;

• Return Management;

• Return Progress.

Return Status

The status of your data return : No_Data

Errors : 0   Queries : 0   OK Errors : 0

This shows the current status of the return and a breakdown of the errors within it. All information is read only. In the example above no return data has been uploaded so status reads 'No_Data'

Return Management

What can I do with My Data Return?   8

Button	Description
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 Return...	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 Return...	Press this button to Delete your data return

Provides a set of functions that can be used to manage the return. Those with bold text and highlighted borders are available. The availability of the functions is dictated by the status of the return.

Return Progress

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted	Date Approved	Date Authorised
View submitted data return...	View approved data return...	View authorised data return...
Export submitted data return...	Export approved data return...	Export authorised data return...

This shows the dates on which the return completed the three process milestones. This section is completed automatically as the return progresses through the workflow process.

Uploading a Return

Click on the **Upload return from file** button

Use the browse button to locate the file you wish to upload.

Highlight the file name and click on Open to select it. Then click on the Upload button to load the file.

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

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. 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.

Once the return has been validated, the return status section on main page will display "Loaded_and_Validated" and the total number of errors and queries found in the return will be displayed.

Viewing the Data Return

Opening the Return

Open the return by clicking on the **Open Return** button.

The header information for the return will be displayed.

Screen Functionality

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

Screen Navigation

To return to the previous page, press the **'Drill Up'** button
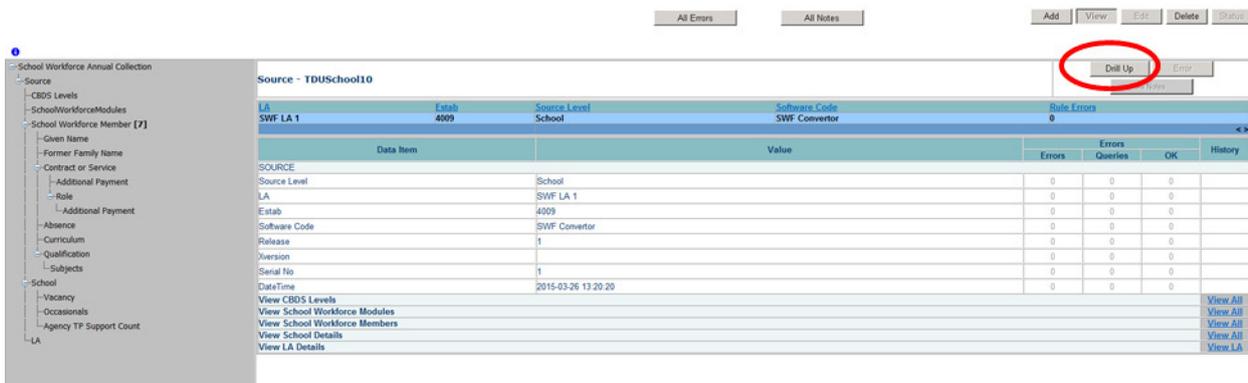
Don't use the browser buttons! When in the data collection, unpredictable behaviour may be experienced if you use the back/forward buttons on your web browser's toolbar.

Mode Buttons

Those buttons determine which operation mode the on-screen data form is in, and which operations are available
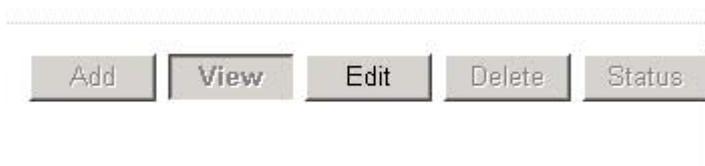
Dark Grey text on sunken button with light border = Active Mode
Black Text on button and highlighted border = Available Mode
Light Grey text on button with light border = Unavailable Mode

Filter Left Hand Menu

Please avoid using the left hand filter menu **(grey panel on the left hand side of the page)** to navigate through the return as it does not always display sections of the return in the correct format and functions such as Add or Edit are not always available

School Workforce Annual Collection
  Source
    CBDS Levels
    SchoolWorkforceModules
    School Workforce Member [7]
      Given Name
      Former Family Name
      Contract or Service
        Additional Payment
        Role
          Additional Payment
      Absence
      Curriculum
      Qualification
        Subjects
    School
      Vacancy
      Occasionals
      Agency TP Support Count
    LA

Source - TDUSchool10

LA	Estab	Source Level	Software Code
SWF LA 1	4009	School	SWF Convertor

Data Item	Value
SOURCE	
Source Level	School
LA	SWF LA 1
Estab	4009
Software Code	SWF Convertor
Release	1
Xversion	
Serial No	1
DateTime	2015-03-26 13:20:20

View CBDS Levels
View School Workforce Modules
View School Workforce Members
View School Details
View LA Details

Viewing the Return Details

Access the source details by clicking on the **View All** button in the 'View Source Details' row on the original screen displaying the header details for the return.
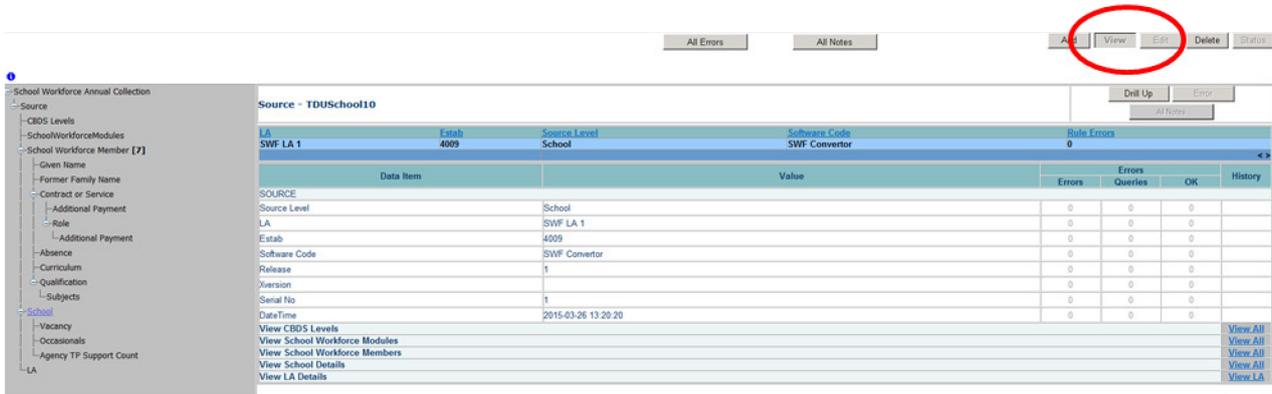
Now access the workforce member details by clicking on the **View All** button in the 'View School Workforce Members' row

This displays the 'Records List' section, with all members of staff visible

Record List

Clicking on one of the blue column headers e.g. 'Date of Birth' will order all the records in date of birth. The record list can be sorted ascending or descending by clicking once or twice on the header of any of the columns.

The lower part of the screen will show the record details of the record highlighted in the top half of the screen

You can sort the record set by given name by clicking on the 'Name' column in the 'Record List' section

You can also filter the record set by typing the surname in the 'Family Name' box in the 'Filter Section' and then click on the **Go** button. The record details for that staff member should be displayed on screen.

Editing within the Data Return

Where possible data should be amended within the Schools Management Information System and a new return re-uploaded.

The default view when a screen is displayed is 'View' mode. To edit the details click on the 'Edit' button. The details for the workforce member will now be available to edit
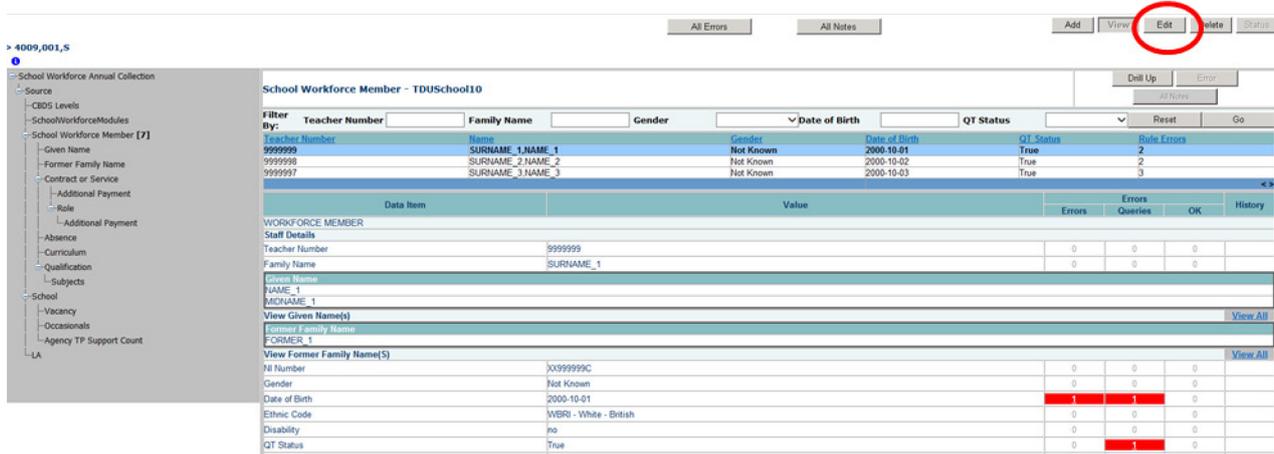
Click on the 'QTS Route' cell in the 'Value' column: a drop down list of selectable values will be displayed.
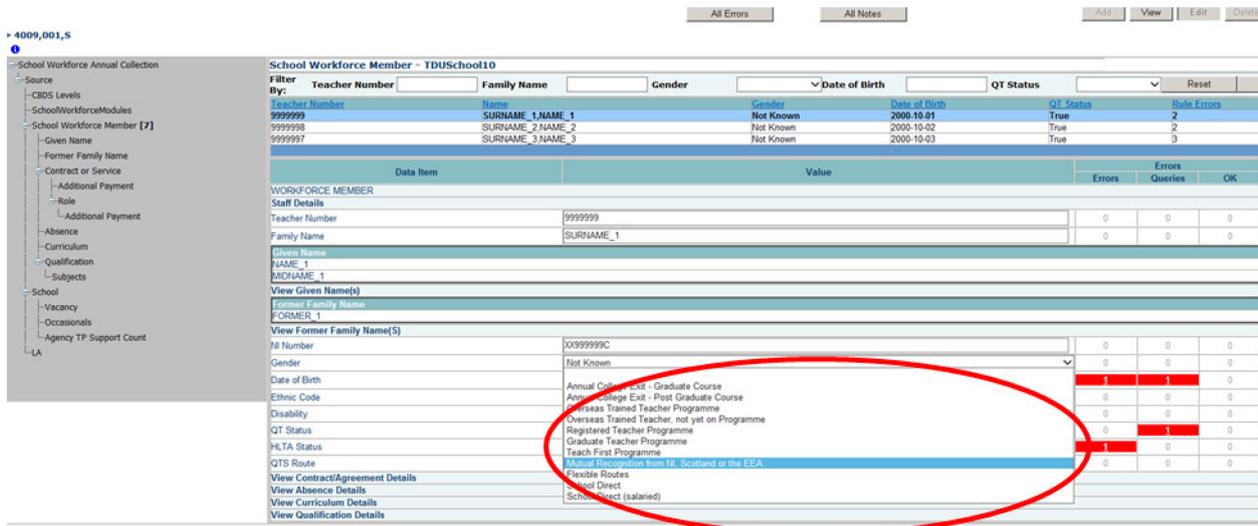
Selecting Annual College Exit – Graduate Course from the list. The selected value will be displayed and the details will be saved. If data is entered rather than selected from a list, navigating to another field or hitting the return/enter key will save the data

Editing existing information will create a history record for the item that has been changed/added

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Changed items are identified by an icon displayed in the 'History' column

Click on the 'History' icon for the 'QTS Route' item that we have just amended. Details of all changes made to the item are displayed (1 row per change), including the name of the user who made the change.

Errors

When a return has been uploaded a number of validation checks are run against the data in that return and all errors and queries are highlighted in red against the relevant data item. There are different levels of errors, 'Return Level' and 'Data Item Level'

Total Return Errors

MY DATA RETURN		
The status of your data return : Amended_by_source		
Errors : 2	Queries : 2	OK Errors : 0

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, eg the school return must contain details on occasional teachers and a return-level error is generated if this information is missing

Return level errors are displayed and are accessible from the 'Header Information' screen

Data Item Level Errors and Queries

Data item errors are highlighted against the item to which they relate. **All** data items that are part of a failed validation rule will contain an error marker, not only the item containing the potentially invalid value. Eg the rule that checks whether a person appears to be aged over 100 years compares the date of birth with the date of the census, so both items would be flagged if that validation failed, even though it is probably only the date of birth that is wrong.

From the Workforce Members screen, select the record, then click **View All** in the 'View Absence Details' row. Errors are displayed against the 'First Day' and 'Last Day' data items in the 'Errors' section of the screen.

Click on the red box in the row for 'Last Day'.

An error report will be displayed

The report shows that 'Last Day of absence' cannot be before the 'First Day of absence'. To see all the data items that are possibly affected by this validation click on the **Details** button next to the error message.

The information will be displayed as hyperlinks on the right

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. Change the mode of the form to 'Edit' and then click on the data item that needs to be changed

Viewing Errors and queries

To view all errors and queries on the return click on the 'All Errors' button

This will show you a list of all queries and errors. You can see the error number, message and also click on 'details' to see what data is not passing validation

You can click on the underlined data values to the right of the screen to be taken to that field in the return

Return Level notes

If a notepad entry is not returned the EDD helpdesk will have to contact you for further information.

Please note from November 2015 it will only be possible to complete 'return level' notes. Return level notes are not overwritten if a resubmission is made.

To add a return level note double click on the pen icon in the return level notes section.
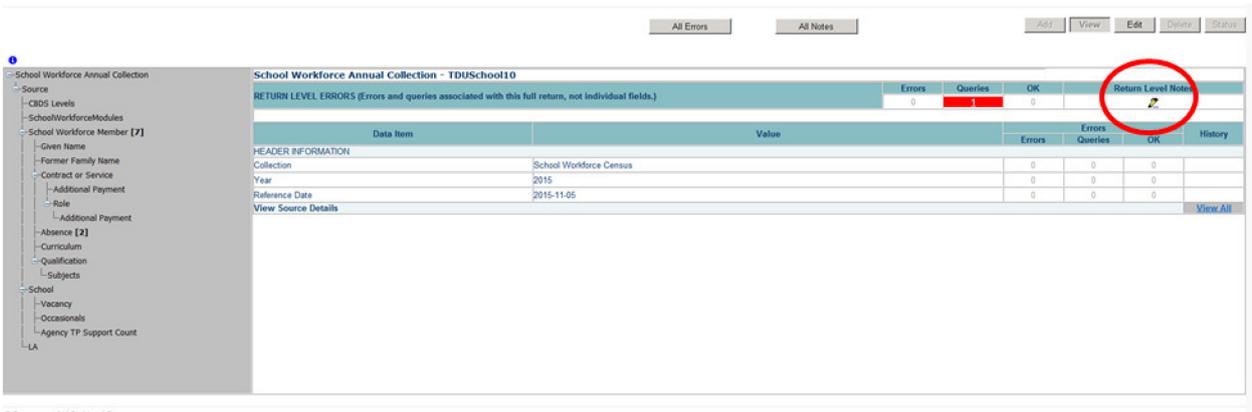
Click add new note and type your note and the error number in the box provided– Do this for all queries/errors you need to provide extra information for

Click create.
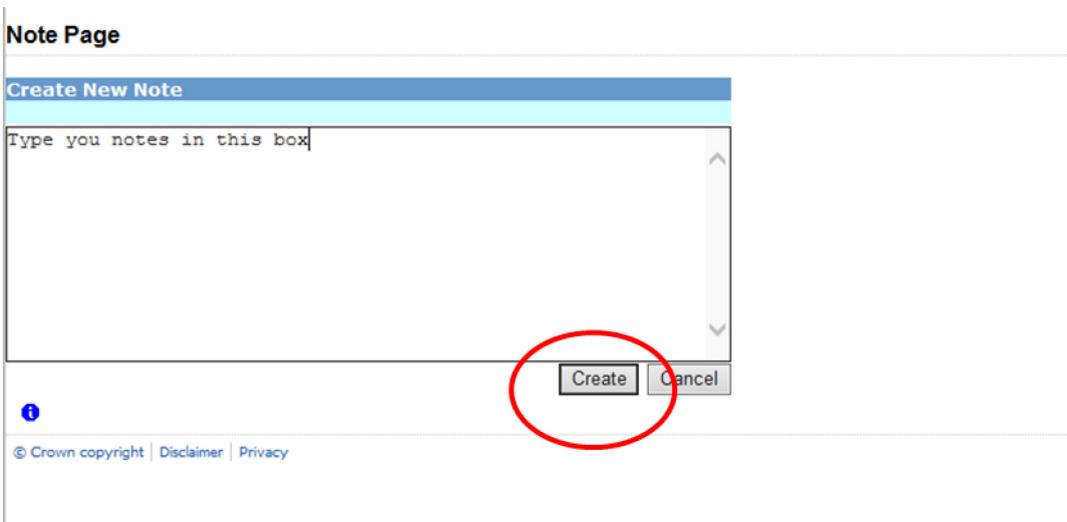
The note will be saved and a record row will be created showing who created the note and when.
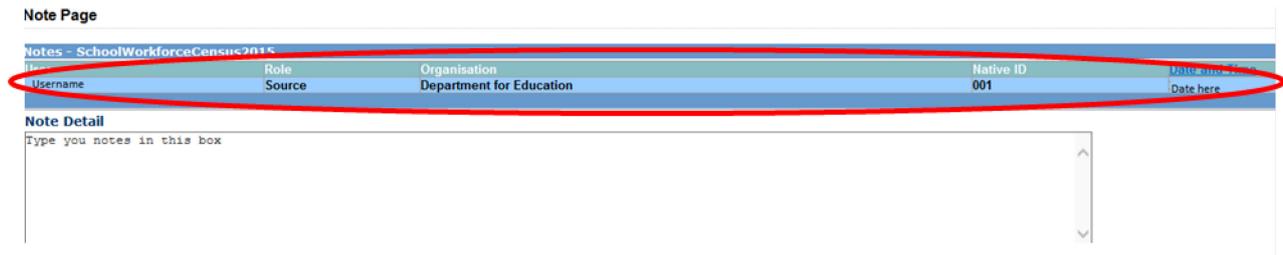
Return to the previous screen by clicking on 'back'

.
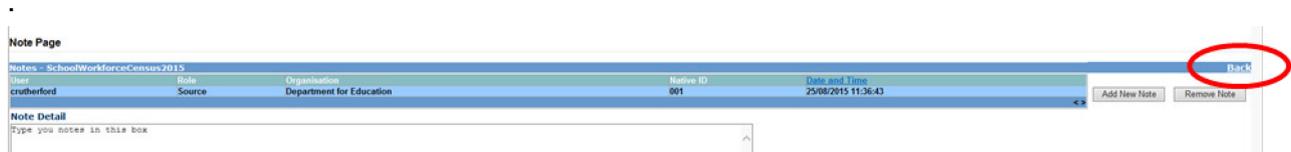
The pen icon will have changed to a notepad icon, which shows that the item has one or more notes attached to it. You are able to record notes in both **Edit** and **View** modes.
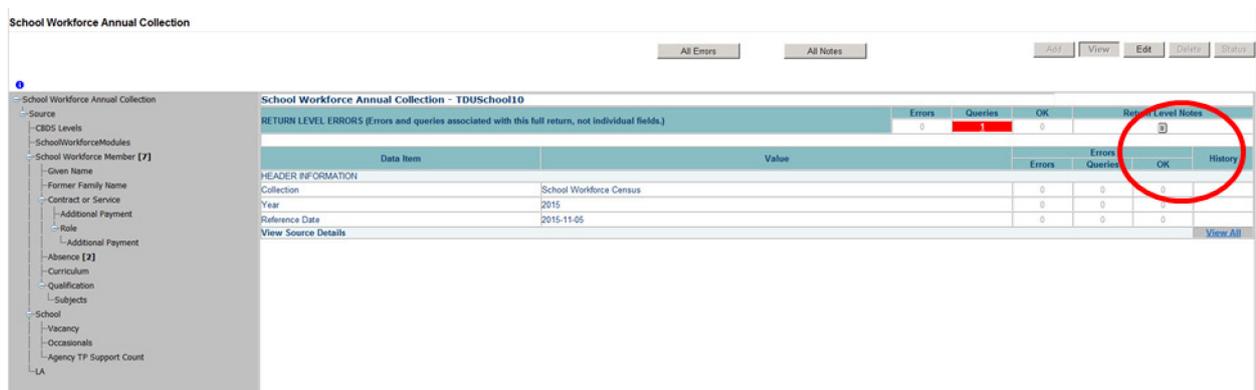
Within the return level notes page is the preserved notes. If you need to upload the return at any time the notes already added will appear in this box.
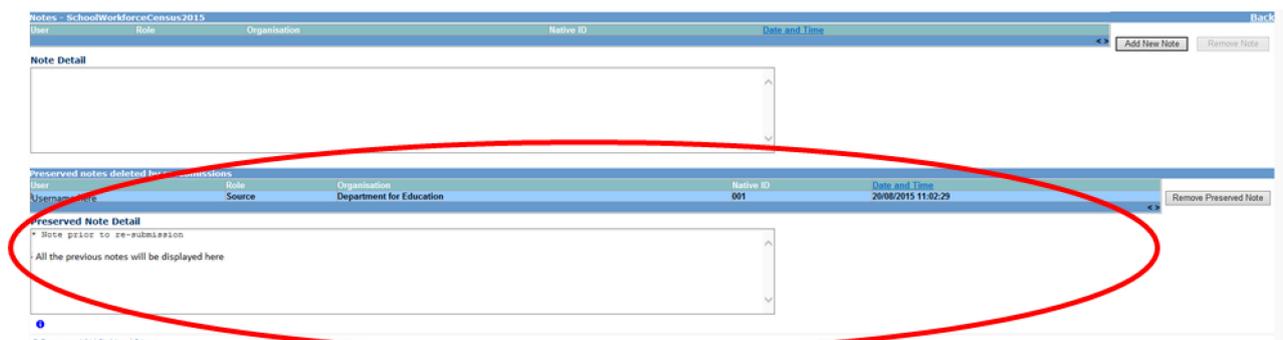
Submitting your return

Once the school is happy with their return they will need to submit it. Until the return has been submitted the Department for Education will not be able to approve the return; prior to submission they will only be able to view it **so it is important that the School, having corrected the errors remembers to go in and 'Submit' the return in order the Department can approve and authorise the return.**

To submit the return, navigate to the school main screen by clicking on **Back to MyCOLLECT page** and click on the **Submit Return** button in the 'Return Management' section. The status of the return will change to 'Submitted'.

You will be asked to confirm this function,

Once you have submitted the button will be greyed out and the box "The status of your data return" will show as "Submitted" & the date will appear in the data submitted box in the "what is happening to my data return" section of the screen.

The Department will then approve and look at the data and authorise the return. Once these have been completed the subsequent dates will appear.

Launching Reports

A number of reports are available on COLLECT, return to the **Source page** by selecting **Back to My Collect page** at the top of the page and click on the **Launch Reports** button
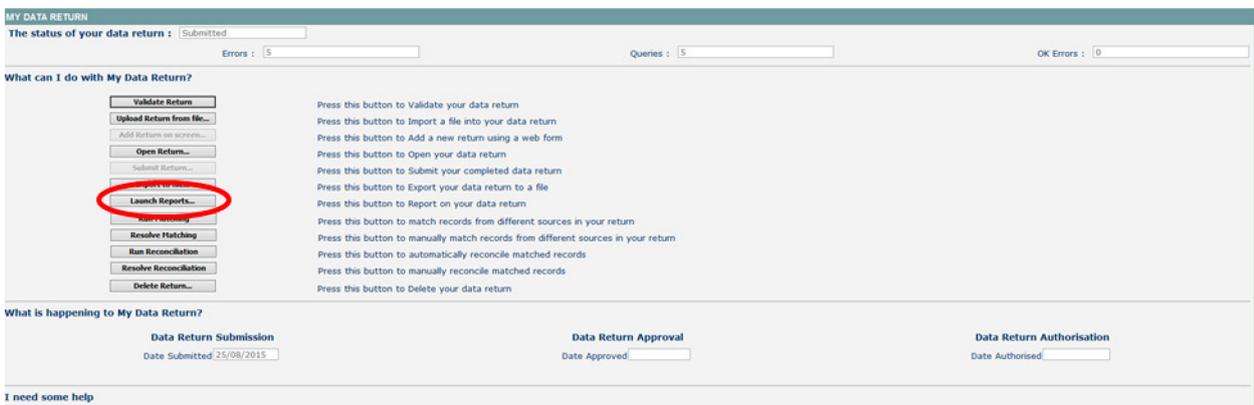
A drop down menu will be displayed and a report can be selected from that drop down list.
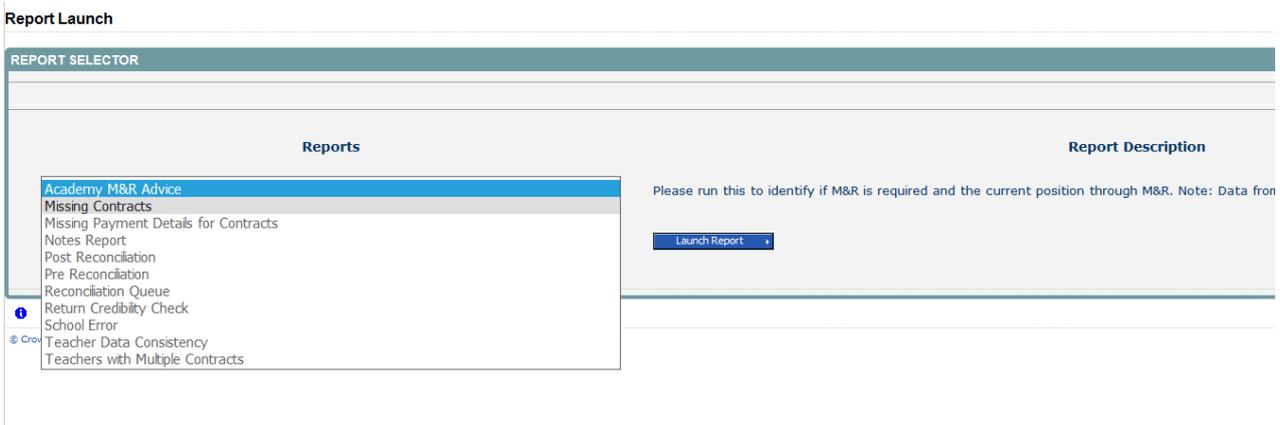
Exporting reports

Once you have clicked on the report you would like to run you will need to click on the Launch report button. This may take a while to run depending upon the amount of data.
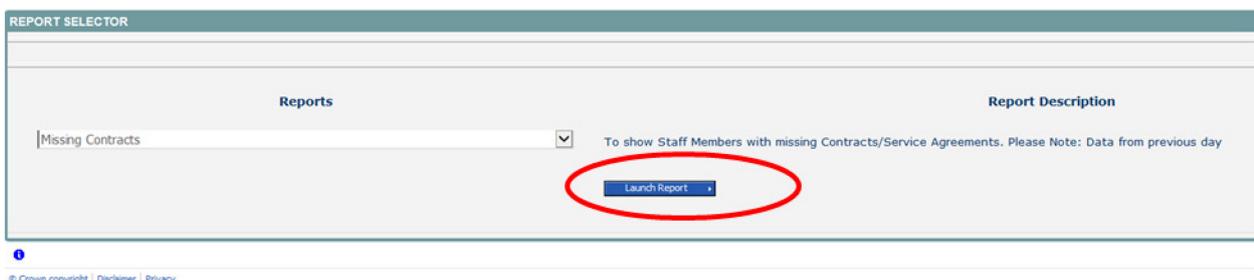
From here, you will need to then select Launch reports again

Report Parameter Selection

Launch Report
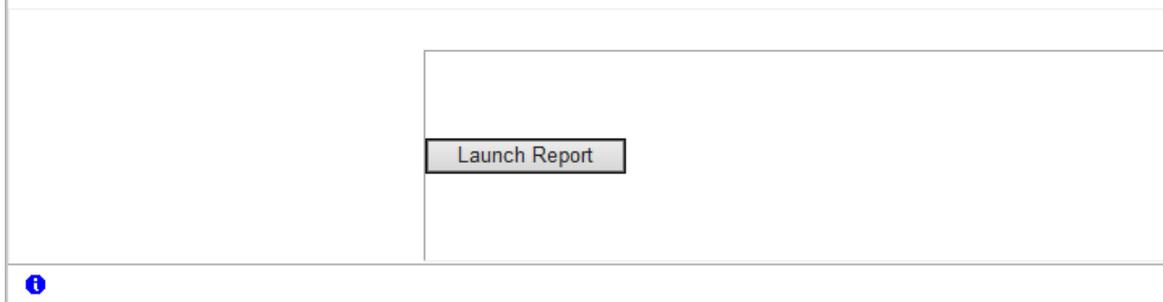
You can export the data in various formats.

Missing Contracts Report
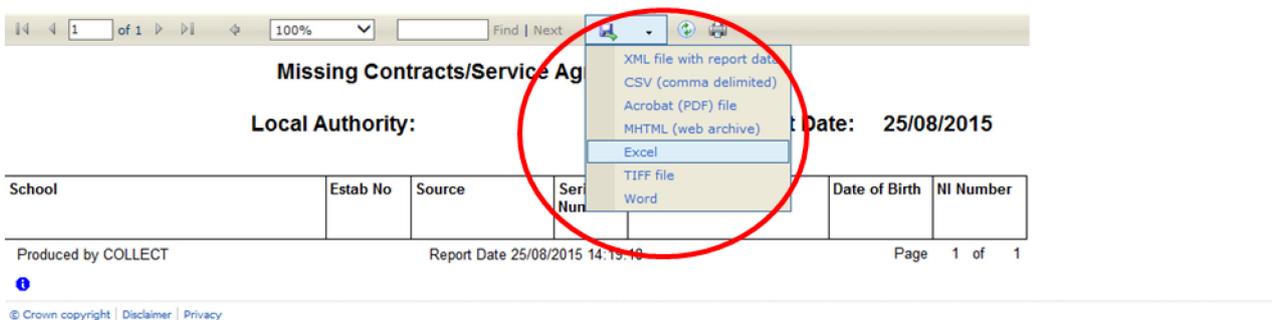
Missing Contracts/Service Ag

XML file with report data
CSV (comma delimited)
Acrobat (PDF) file
MHTML (web archive)
Excel
TIFF file
Word

Local Authority: **Date: 25/08/2015**

School	Estab No	Source	Ser Nun			Date of Birth	NI Number

Produced by COLLECT   Report Date 25/08/2015 14:19:10   Page 1 of 1

© Crown copyright | Disclaimer | Privacy

The reports are run against a copy of the data as at close of play the previous day. If any data has been edited, deleted, inserted or reloaded since the data was copied, the report will not match the live data.

Once you have finished viewing the report, click on the 'Back to Reports' link at the top right hand side of the page. From here, select the 'Back to My COLLECT Page' to return back to your 'MySource' page.

Exporting a data return

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

To export the data, click on the export to file button on the front screen.
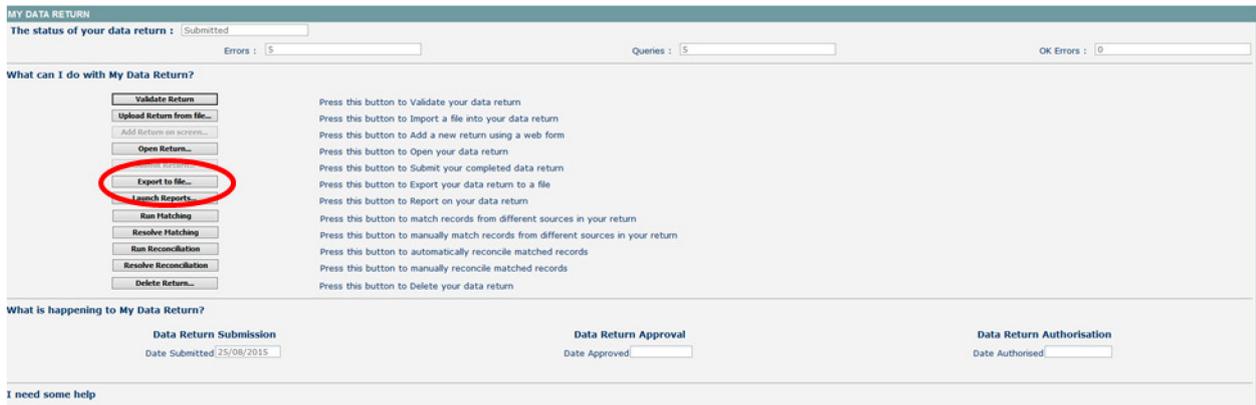
The following screen will be displayed. Select the format for the export, CSV or XML then select the 'Export' button.
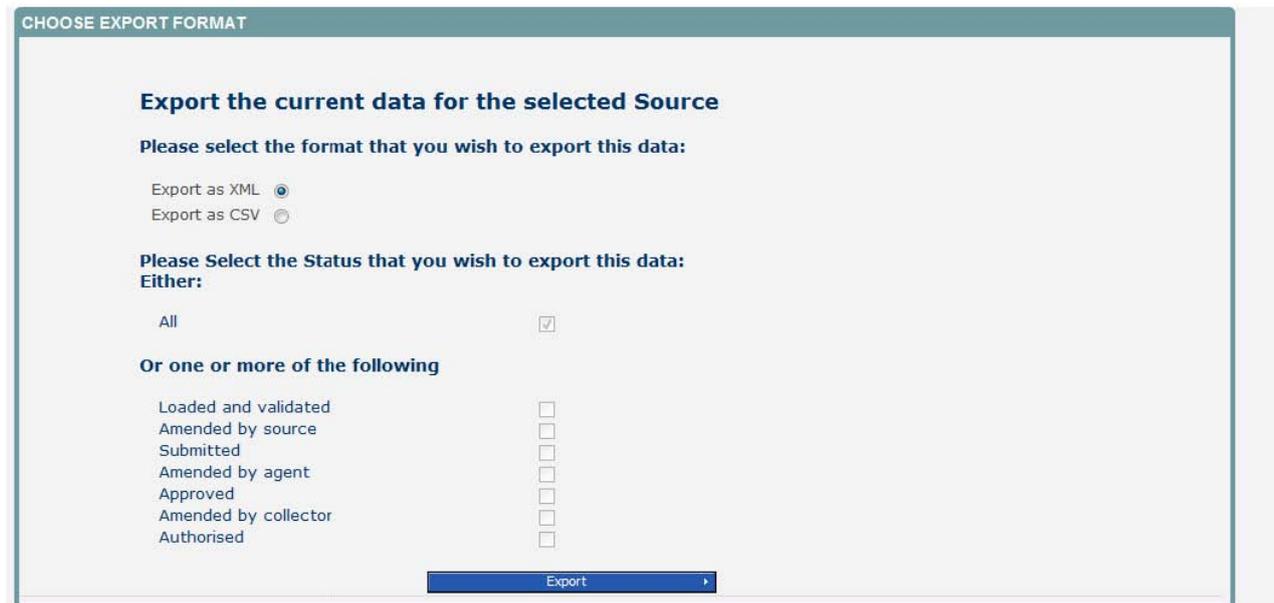
Once this has run you will get an option to open or save the export.

Exporting as XML will generate a zip file containing the selected return data. Exporting as CSV generates a zip file containing CSV files that relate to how data is stored within COLLECT. Make your choice and click the 'Export' Button and follow the web browser prompts on screen.

The reports are run against a copy of the data as at close of play the previous day. If any data has been edited, deleted, inserted or reloaded since the data was copied, the report will not match the live data.

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.

When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. Click on the **Open** button

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:
https://collectdata.education.gov.uk
Then select ok and ok.
Alternatively you could try changing you security settings by

Going into the **Tools** menu option at the top of the screen, Select **Internet Options,** Select **Security,** Click on the **custom level** button, then make sure that **automatic prompting for file downloads** is set to **enabled** (it's a third of the way down the list)

Then try producing the export again and this time the Open/Save/Cancel dialogue box should appear

Click on the **Open** button to bring up the file details in Windows Explorer
Double click on the folder **'EstabNo='** to open it; it contains the exported XML file, which you can double click to display the data
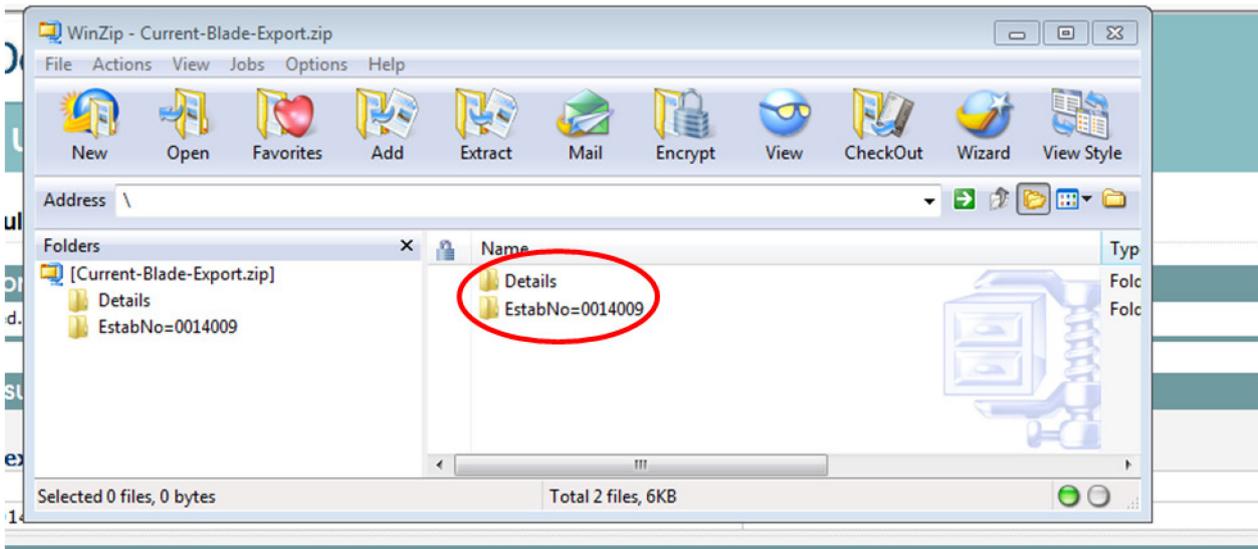
Exports can also be provided in CSV format. Select 'Export as CSV' and when the **Save** and **Open** options appear click on the **Open** button
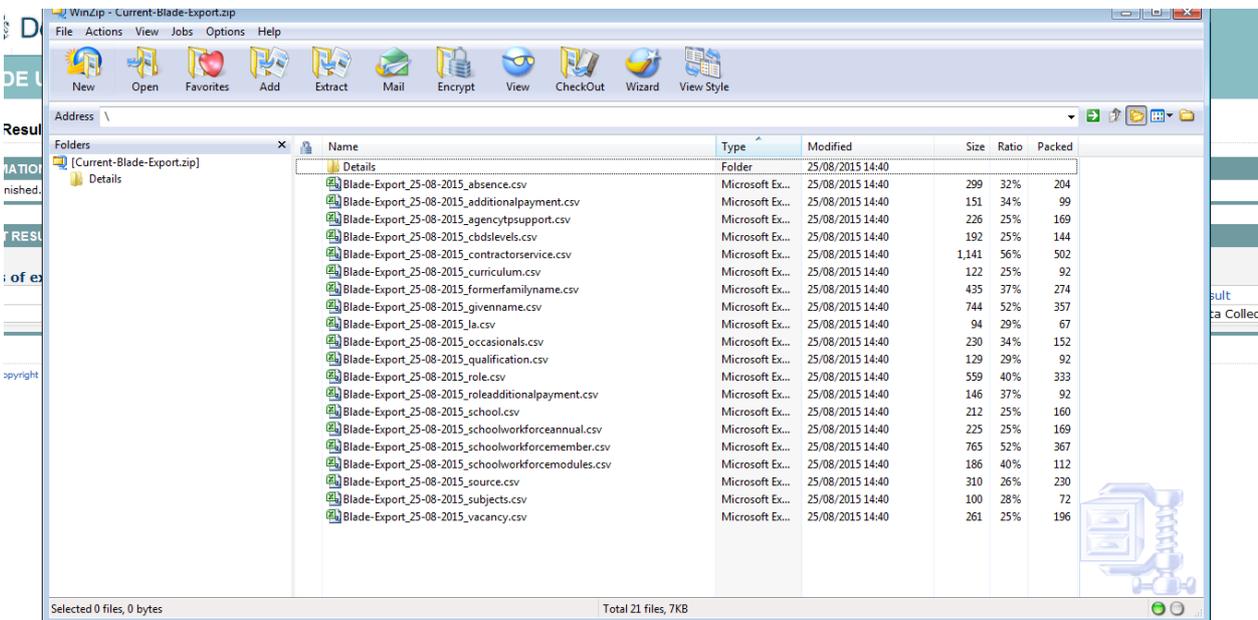
Matching and reconciliation

IMPORTANT INFORMATION: You only need to complete matching and reconciliation if you have uploaded data from two separate sources e.g. staff information from the MIS and pay details from your HR system.

There are four stages to this process:

Run Matching

Resolve Matching

Run Reconciliation

Resolve Reconciliation

This process allows Academies who have more than one return to merge the data from the multiple returns thereby creating one return only per school. Academies that only have one return do not need to run M & R.

IMPORTANT INFORMATION: The guidance below is provided due to issues that arose around M & R in previous collections.

1. After completing Matching and Reconciliation the return should be 're-validated'. Do this by going to the main source data return page and selecting the 'Validate Return' button. This will remove all the errors associated with the original partial returns and re-validate the data in the 'Master Collect' return.

2. Issues with data – Some returns had multiple records with very similar or the same data in them. For example curriculum records with the same Year Group and Subject and multiple contract records which had the same role and post and overlapping start and end periods. The M & R process does not handle these as they would seem to be duplication in the original data from the MIS system. If the Academy experience this then they should investigate why these are occurring in the XML file before trying to complete the M & R process. Reason being that they might need to produce new XSLT files from their MIS to eliminate these duplicates and then run M & R against the new files. This was typically occurring on Contract, Curriculum and Absence records

3. Once the process of M & R has been started or is part way through i.e. return has been matched but not yet reconciled, **then the data in the original returns and the master collect returns should not be edited or records added or deleted** as these will corrupt the M & R process. If it is necessary to add, edit or delete data then the user should go back and amend the original return data and then re-run M & R on the amended return.

4. If this is not done then sometimes after running reconciliation the return will have a status of 'Reconcilation_Failed'. If this happens then re-run matching again, resolve any outstanding matches and then re-run reconciliation.

5. To help Academies Identify what stage their return is at a number of new reports have been provided. These are only relevant for academies using M & R and we would not recommend that these are run by Academies who do not use M & R. Please see details on M & R reports at the end of this section.

6. Matching functionality will only be available on academies with more than one return associated with it.

7. Reconciliation' functionality will only be available when more than one return for that school has been uploaded and matching has been successfully completed on that return.

8. **Please note** when matching, if one return has blanks, or NOBT in a field e.g. QTS Route, Ethnic Code, Disability and the other return has these fields populated then the 'Master Collect' return will be populated with the **valid values rather than the nulls or 'NOBT' values.**

9. After M & R has been successfully completed there should only be one visible source in COLLECT. This should be 'Collect Master' source. If there is still more than one source then M & R has not yet been fully completed.

10. **WARNING:** If a return has already been reconciled, re-running the matching again will undo any reconciliation action previously taken.

11. Whenever contract data is supplied then the post and allowance data should also be supplied alongside the contract data in the same return. If some contract information comes in on one return and post and allowance information comes in on another return then this can result in two contract records being generated even after matching and reconciliation.

Matching

Matching is the first part of the M & R process and is concerned with identifying and matching the data at staff member level. Staff members will only be matched using a predefined set of business rules (see Annex A). Using these rules the majority of the staff workforce members will be matched but a few will need to be matched manually if some of the key id fields vary so the system cannot be certain that two or more member records are the same person.

Returns for a school should have a status of submitted or amended by source in order to run Matching.

To run matching, go into the source page and select the 'Run Matching' button
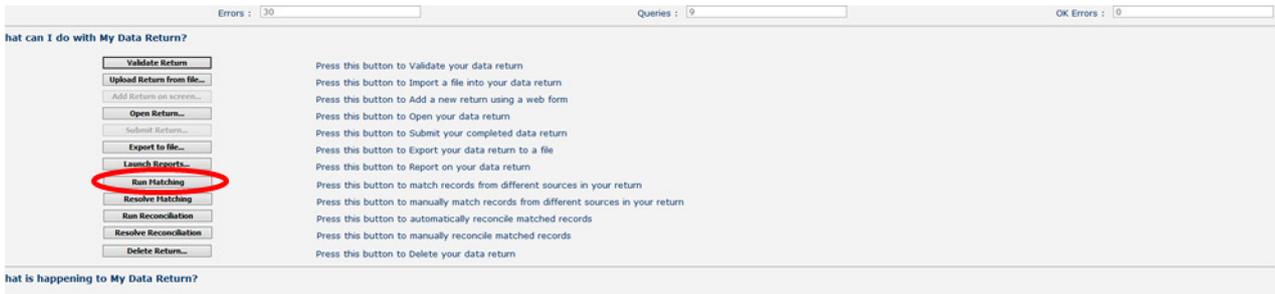
Highlight the school and selected the 'Add' button.
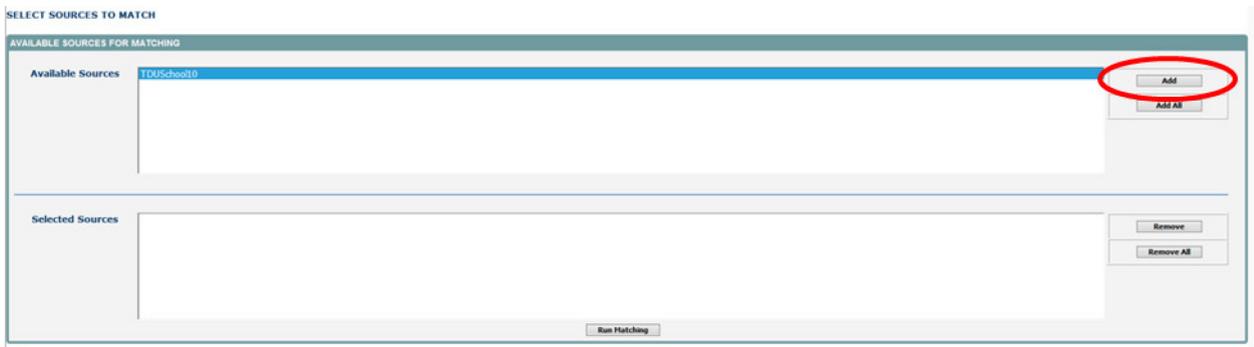
This will move the school highlighted across to the right hand box. Then select the 'Run Matching' button
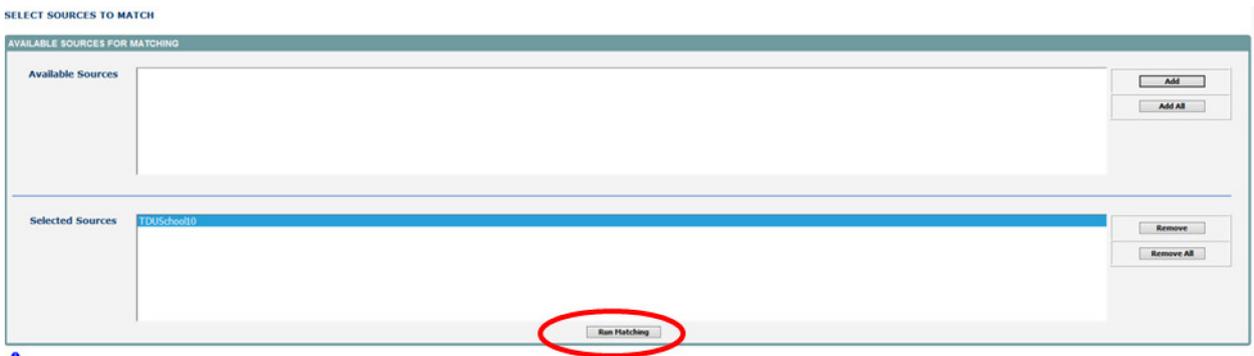
By selecting this button you will have started the matching process for the return. The user will be returned to the source screen and the matching process will be queued. The status of the return will allow you to see the stage the return is at in the process

Status of Return during Matching Process

'Awaiting_Matching' - the return has been marked ready for matching but is still in a queue waiting for the matching process to start.

'Matching_in_Progress' - This is when the matching is actually being completed on that return. While the return has this status then a user cannot view or edit that return.

'Matching_Failed' - This is when the matching process has failed to complete. In these cases then matching will need to be rerun.

'Amended_By_Source' - the matching has been completed and is now ready for the user to check whether a records need to be manually matched.

Rules for Matching

Please refer to Annex A for more detail on the rules used for producing the matches. Matching will be performed at Staff Details level i.e. identifying whether the individual staff members are the same individual or could be the same individual. There are two levels of matching, automatic and manual.

Automatic Matches – no manual intervention is required, the record will be marked as a match and resolved

Potential Matches – Will need to be maually matched

No Match Identified – There are no matching records

Resolve Matching

Once the Matching has been run and the 'Amended_By_Source' is shown as the status you will need to resolve any records not automatically matched. Click on the Resolve Matching button to run this

Automatic Matches

The example below shows where there are two records one from each return which can be automatically matched as they match on a number of 'key' fields. The given name and NI number are different but teacher number, family name and DOB all match. So this will result in one individual going through to reconciliation rather than two. Please see example below.

The user does not have to take any action on these matches unless they do not want them to be a match.

If user decides that these are in fact not a match then they can change the result from 'Match – 1' to 'No match' by either using the 'Flip all match results' button or change each line by selecting from the 'Result' column, then select the 'Update Matches'. This will result in two workforce members going through to reconciliation rather than one.

Manual Matches

If there are records which match on a few of the key ID fields eg Teacher Number, family name, DOB, NI Number but not enough of them then they will be identified in the 'Manual Matches – unresolved' as COLLECT does not know whether to treat them as one person or not so the user has to resolve these, please see example below.

If these are the same person then select 'Update Matches' and that will treat them a one individual, if user selects 'Flip all match results' button and set them to no match then that will be treated as two none matching individuals.

Reconcilliation

The aim of reconciliation is to allow the system to decide how to process more than one set of data for a school e.g. should the records be merged and which records should be merged and which kept separate. Data reconciliation will be performed automatically using a set of predefined business rules (please see Annex B): however there is also a requirement for manual reconciliation where data differences across records cannot be resolved automatically.

Unlike Matching which is just done at 'Workforce member' level reconciliation is carried out at record level for example all the 'curriculum' records for an individual will be reconciled, 'absences' records for an individual will be reconciled.

To run reconciliation, select the 'Run Reconciliation' button from the source screen. Schools will only be included in the picklist of schools to reconcile if they have more than one return and matching has been run and all manual matches have been be resolved.

If return has a status of 'Matching_Failed' then again Matching will have to be rerun before reconciliation can be run.

Reconciliation (Running)

Once all the manual matches on a return have been resolved then the user can go on and run 'Reconciliation' against that return.

Highlight the School, click add and then select the 'Run Reconciliation'.

This will start the reconciliation process which will now run in the background so a number of schools can be run overnight and will then be ready to work on the next day. Use the status of the return to identify whether reconciliation has been run successfully or not.

'Awaiting_Reconciliation' - when the return has been placed in the reconciliation queue but reconciliation has not yet been completed.

Reconciliation_in_Progress'. - when the return has reached the top of the reconciliation queue and is currently being reconciled.

'Reconciliation_Failed'. - shows that there has been an error during the reconciliation process. This can be caused because the return has been editing between matching being completed and reconciliation being run and unresolved matches have been generated. These need to be resolved before reconciliation should be re-run.

'Amended_By_Source' - the reconciliation has been completed and is now ready for the user to check whether all records have been automatically reconciled or whether some need to be manually reconciled

While the process of reconciliation is being carried out on the return then the user will not be able to added/edit/delete.

Resolve Reconciliation

Once the reconciliation has been run and the 'Amended_By_Source' is shown as the status you will need to resolve any records not automatically reconciled. Click on the resolve reconciliation button to run this.

Reconciliation Business Rules

To be able to combine multiple records into one record, the SWF Collect system uses defined business rules (please refer to Annex B) to determine when these can be reconciled automatically and when they have to reconciled manually.

When the return status returns to Amended_By_Source then the user's needs to go in and check the results of the reconciliation. To go in and check the result of the reconciliation select the 'Resolve Reconciliation' button. The following screen will appear

and you have the choice of checking the 'Reconciled Records' or the 'Unreconciled Records'.

There is no action required on the 'Reconciled Records' as these are the ones that COLLECT has been able to automatically reconcile. The number in brackets is the number of records which were reconciled.

Unreconciled Records – These are records than cannot be resolved using the predefined business rules. In these cases the user has to make decisions as to which data should be included in the 'Master' record.

The user should work down the list of record types, reconciling the SchoolWorkforceMembers first, then the 'GivenName' then the ContractorService' and so on

If we look at this example of a workforce member that needs manual reconciling. The bottom half of the screen shows that there is a workforce member record, which has some of the same information and some different. The different fields are and NINumber, GenderCurrent and PersonDateBirth.

By selecting from the drop down options for these fields the user can select the values that will be included in the 'Master Collect' record, and then select the 'Update Master' button to save those selections

In the next example, this is where there are two 'Given name' entries for the workforce member. The middle part of the screen provides details of the workforce member, the bottom part of the screen show the two 'Given name' records.

The user can either save both entries to 'Master Collect' by first selecting the 'Copy to COLLECT Master' button to save one entry.

Then select the 'Update Master' to save the second entry. The result of this is that the workforce member will have two 'Given name' records in the 'Master Collect' return

If the users only want to have one 'Given Name' entry included in the 'Master Collect' return then select the entry from the 'PersonGivenName' drop down list and the select 'Update Master' button.

In this final example there are two 'Additional Payment' records for a workforce member with exactly the same data in them from the same return. In this case there are no different values to pick from but the user must decide whether they should be treated as two separate

'Additional Payments' for the workforce member in which case they must use the 'copy to COLLECT master' and 'Update Master' buttons to take them both into 'Master Collect' return.

If they are genuine duplicates and only one 'Additional Payment' is required then just select the 'Update Master' and only one of the 'Additional Payment' will be copied across to the 'Master Collect' return

Rolling back a manual reconciliation

If the user has incorrectly reconciled a record then they can undo the last reconciliation. To do this select 'Reconciled Records' from the drop down list on the 'Manual Reconciliation' screen.

Select the appropriate record type from the 'Select record type' drop down list and highlight the select the relevant record from the list of records which have been reconciled then select the 'Undo Reconciliation' button. The user can then work back reconciling more records if required.

When all the manual outstanding reconciliations have been resolved **remember you will need to revalidate the return after finishing your matching and reconciliation**

You should then be left with only be one return visible in the COLLECT system for the school, namely 'Collect System' return. If there are still more than one return then reconciliation has not been completed. You can run the Academy M&R Advice Report to determine this.

Academy M&R Advice Report

◀ ◀ 1 of 1 ▶ ▶	◈	100% ▼	Find | Next ▣ ▼ ⊕ 🖶

<div align="center">

Matching & Reconciliation Advice

LAEstab	School Name	Status
0014009	TDUSchool10	M&R Completed

</div>

Once you are happy with your data please remember to submit the data from your front screen.

Useful hints

1. VERY IMPORTANT - Re-submissions – if a data return for a school already exists in the system and you upload another file, it will overwrite the original return completely no matter where it is in the workflow (submitted or authorised). If you try to upload a file that is already in the system then you will be given the following message
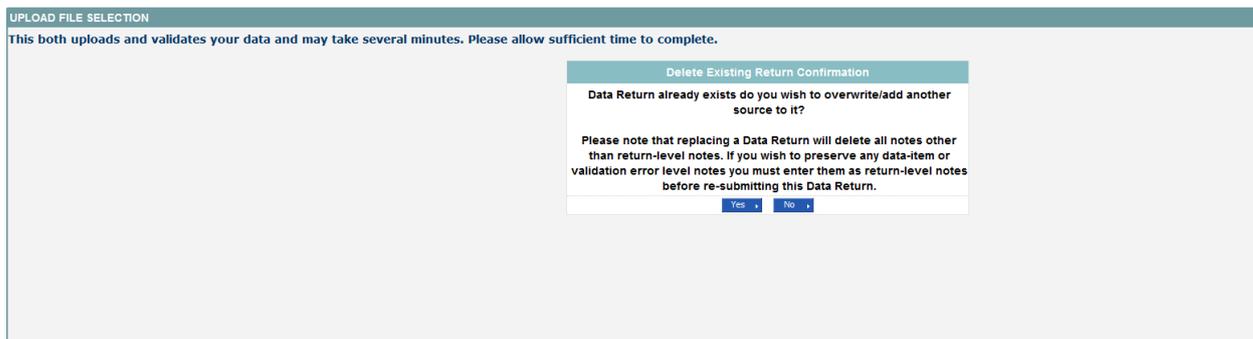
2. We recommend that you take great care when selecting this option and make sure that all parties who may be working, or have worked on this return agree to the re-submission. When uploading a zip file containing many data then please be aware that you will not be prompted with the above message if any of the settings contained in the zip file are already on the system. It will automatically overwrite the return without warning you.

3. When navigating around the COLLECT system it is important that you use the COLLECT 'Drill up' button or COLLECT 'back' button which are toward the top right of your COLLECT screen. If the 'Drill up' or 'back' buttons are not visible then you may be in one of the earlier screens and to navigate back from here you will need to click 'Back to My COLLECT page' page located at the top of your COLLECT screen above your login name. You will be either given an error message or 'thrown' out of the system if you use your web browser back button.

4. When amending errors, once you have completed your actions on a particular error you will need to drill back out of that record to the main screen before being able to select another error to investigate. If you try to select an error and have found the error through the 'All Errors' page before drilling out you will be given the error message: 'Cannot choose another error to investigate'

Help

COLLECT access is administered directly by academies for their users. This includes registering for COLLECT, activating your account and giving you access to specific collections. Please get in touch with the approver in your academy who will be able to make sure that you have the appropriate access.

If you are experiencing problems with COLLECT or have a data collection query, please submit a service request to the Data Collection Helpdesk.

If you are having problems logging into Secure Access, please refer to the 'Help' section on Secure Access. If you are still unable to resolve your issue, please submit a service request to the SA service desk.

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