



Department
for Education

School census 2016

COLLECT guide for local authorities

January 2016

Contents

COLLECT and secure access	3
Agent page	6
Filter by	6
Performance summary	7
Sources	7
Agent functions	8
Loading a return for a single school	9
Uploading multiple files	11
Viewing the return details	12
Editing data within the return	13
Errors	14
Total return errors	14
Return level errors	14
To view all errors and queries on the return	14
Correcting errors	15
Updating class information	16
Providing clarification/ supplementary information	19
Approving the return	21
Queues	23
Reports	26
Exporting a return	28
Export selected	28
Export multiple	28
Export all	28
Academy export	28
Selecting format	29
Screen functionality	31
Screen navigation	31
Navigation controls	31
Mode buttons	32
Help	33

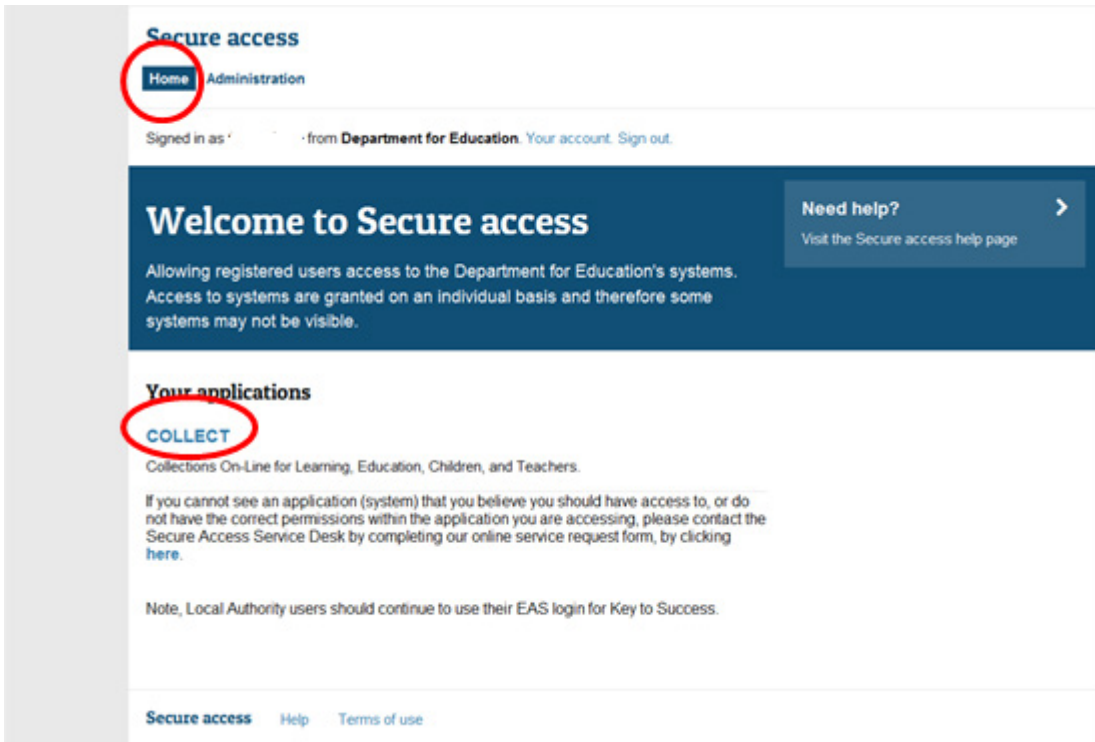
COLLECT and secure access

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

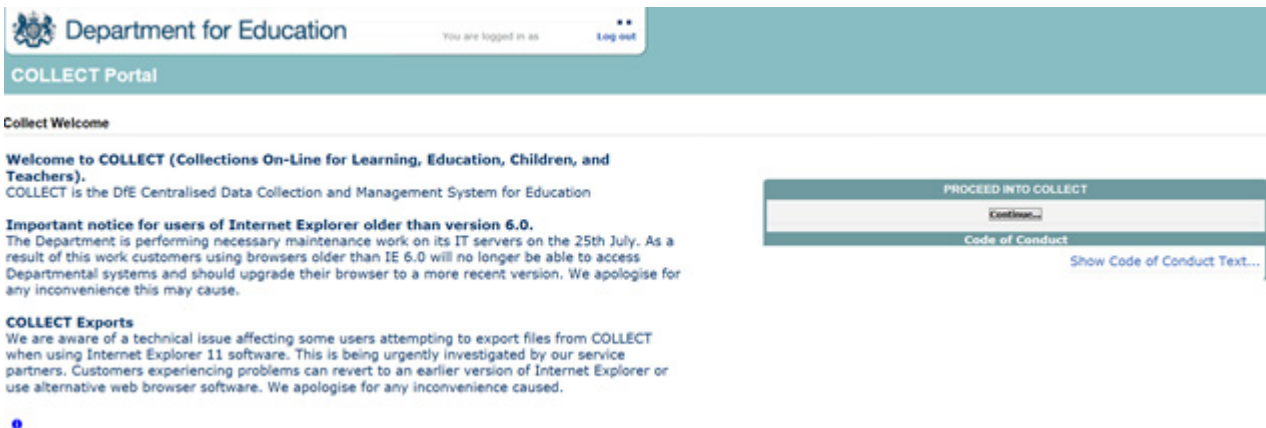
The screenshot shows the 'Secure access' portal. At the top, there is a header 'Secure access' and a link for 'Forgotten username or password?'. Below this are input fields for 'Username' and a password field (represented by dots). To the right of the password field is a checkbox labeled 'I agree to the terms of use' and a 'Sign in' button. A large blue banner contains the text 'Welcome to Secure access' and a sub-header 'First time here?' with a right-pointing arrow and the text 'Visit the Secure Access Help page'. Below the banner is a section titled 'Announcements' with three entries: 1) '07/04/2014 S2S Secure Data Transfer - Essential Maintenance' with details about system unavailability on 8th April 2014; 2) '28/03/2014 Secure Access - Scheduled Downtime' with details about unavailability on Friday 4th April 4-6pm; 3) '09/12/2013 School Access to COLLECT, s2s and KTS' with a note about contacting the Approver for school access requests.

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

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



Then click on to 'continue' to enter COLLECT as below:



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 screenshot displays the 'MY DATA COLLECTIONS' section of the COLLECT system. It features a table with columns for Data Collection, User Role, Organisation, Status, Due Date, and Days Due. The 'SchoolCensus 2016_Spring' collection is highlighted in red. Below the table, a blue button labeled 'Select Data Collection' is circled in red. The interface also includes a 'News' section with two announcements regarding system availability.

Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2016_Summer	Administrator	Department for Education	Testing/Live	19/05/2016 00:00:00	141
SchoolCensus 2016_Spring	Administrator	Department for Education	Familiarisation/Live	21/01/2016 00:00:00	22
SchoolCensus 2016_Spring	Collector	Department for Education	Familiarisation/Live	21/01/2016 00:00:00	22
SchoolCensus 2016_Spring	Agent	SA Test LA Open	Familiarisation	21/01/2016 00:00:00	22
SchoolCensus 2016_Spring	Source	TDU Test Secondary 1	Familiarisation	21/01/2016 00:00:00	22
SchoolCensus 2015_Summer	Agent	Department for Education	Testing	21/05/2015 00:00:00	-223
SchoolCensus 2015_Summer	Collector	Department for Education	Testing	21/05/2015 00:00:00	-223
SchoolCensus 2015_Summer	Administrator	Department for Education	Testing/Live	21/05/2015 00:00:00	-223
SchoolCensus 2015_Spring	Administrator	Department for Education	Testing/Live	15/01/2015 00:00:00	-349
SchoolCensus 2015_Spring	Agent	Department for Education	Testing	15/01/2015 00:00:00	-349

Page 1 of 5

[Select Data Collection](#)

News

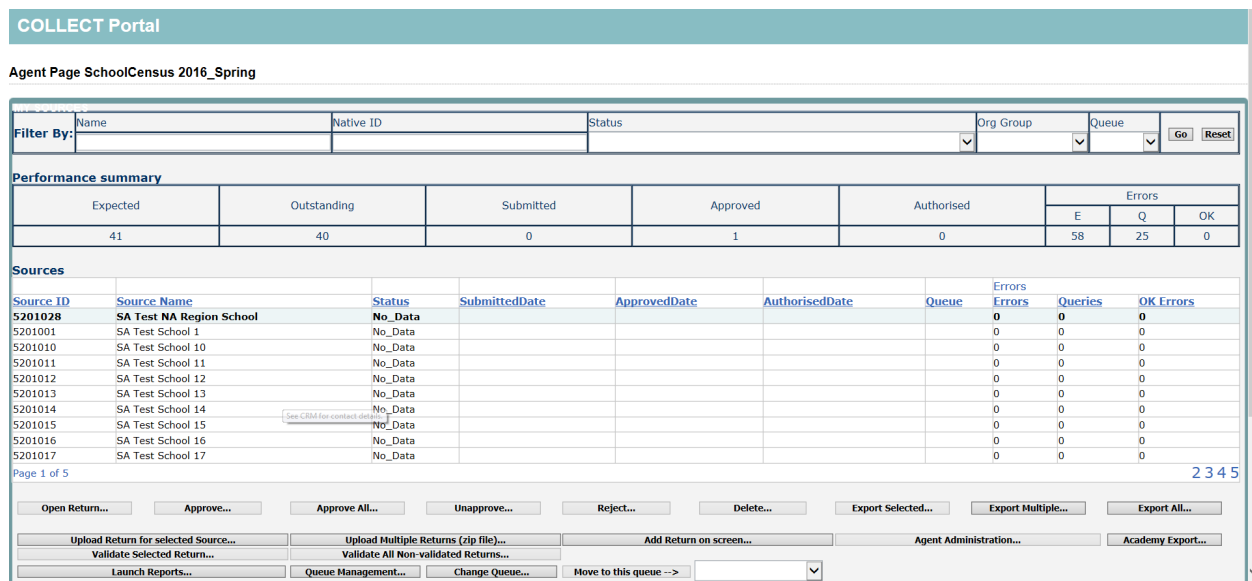
Welcome to COLLECT (Collections On-Line for Learning, Education, Children, and Teachers).
COLLECT is the DfE Centralised Data Collection and Management System for Education

COLLECT Availability
Due to essential maintenance COLLECT will be unavailable on Tuesday 22nd December 2015 between 09:00 and 10:00. We apologise for any inconvenience this may cause.

COLLECT Availability
Due to essential maintenance COLLECT will be unavailable on Saturday 2nd January 2016. We apologise for any inconvenience this may cause.

Agent page

The agent (local authority) main screen will now be displayed listing all the schools for your local authority.



The agent screen comprises four main sections:

1. Filter by
2. Performance summary
3. Sources
4. Agent functions

Filter by



This section allows you to limit the number of schools displayed in the source section of the screen. It can be used to display a single school or a group of schools that have the same characteristics.

For example; by entering an establishment number in the 'native id' and selecting the 'go' button then only the school with that establishment number will appear on the screen. This saves the user having to go through numerous screens to get to the particular school return they want to work on

The user can only change the sort order by clicking on one of the headers with a blue text. For example; by clicking on the 'source name' header all the schools in the local authority return will be sorted in ascending school name order, click again and they will be sorted in descending school name order.

Performance summary

Performance summary							
Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
2533	2530	3	0	0	75	51	0

This area of the screen shows a breakdown of the status of the returns for the authority's schools that are part of the collection.

It shows

1. The total number of schools that a return is expected from;
2. The total number of schools who have yet to submit their return;
3. The total number of schools who have submitted their return;
4. The total number of school returns approved by the local authority;
- 4.1. The total number of school returns authorised by the department for education;
5. The total number of errors across all returns, sorted by error severity.

This section is refreshed any time a change is made to the underlying data e.g. when the status of a school return has changed from 'submitted' to 'approved', the approved total will be incremented by 1, while the submitted total will decrease by 1.

Sources

Agent Page SchoolCensus 2016_Spring

Filter By:		Name	Native ID	Status	Org Group	Queue	Go	Reset	
Performance summary									
Expected	Outstanding	Submitted	Approved	Authorised	Errors				
					E	Q	OK		
41	40	0	1	0	58	25	0		
Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	29/12/2015			58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

This section lists all of the data sources for whom a data return is expected for the collection (unless a filter has been applied).

Agent functions



This section contains the functions that an agent (local authority) can use to manage the returns it is responsible for.

Loading a return for a single school

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

COLLECT Portal

Agent Page SchoolCensus 2016_Spring

Filter By: Name Native ID Status Org Group Queue

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	0	1	0	58	25	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	29/12/2015			58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

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

UPLOAD FILE SELECTION

This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.

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

UPLOAD FILE SELECTION

This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.

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

Uploading School1.xml

FILE UPLOAD PROGRESS ...

Data return upload in progress, please wait....

Loading raw return data, 243 elements processed



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

FILE UPLOAD PROGRESS ...

Your data return has been successfully loaded and is queued for validation. Please return later to view any validation errors identified.

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

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

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

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

The only difference being that when an local authority uploads a return then the status will be set to 'submitted'. When a school uploads a return the status will be set to 'loaded & validated'.

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

COLLECT Portal

Agent Page SchoolCensus 2016_Spring

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	1	0	0	58	24	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5204001	TDU Test Secondary 1	Submitted	21/12/2015				58	24	0
5201028	SA Test NA Region School	No_Data				0	0	0	0
5201001	SA Test School 1	No_Data				0	0	0	0
5201010	SA Test School 10	No_Data				0	0	0	0
5201011	SA Test School 11	No_Data				0	0	0	0
5201012	SA Test School 12	No_Data				0	0	0	0
5201013	SA Test School 13	No_Data				0	0	0	0
5201014	SA Test School 14	No_Data				0	0	0	0
5201015	SA Test School 15	No_Data				0	0	0	0
5201016	SA Test School 16	No_Data				0	0	0	0

Page 1 of 5 2 3 4 5

Validate Selected Return... Validate All Non-validated Returns...

Uploading multiple files

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

To access the facility, click on the upload multiple returns (zip file) button.

COLLECT Portal

Agent Page SchoolCensus 2016_Spring

Filter By: Name Native ID Status Org Group Queue

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	1	0	0	58	25	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Amended_by_agent	21/12/2015				58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

Click on the browse button to navigate to the zip file in explorer (examplezipfile.zip) that you want to upload.

UPLOAD FILE SELECTION

This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.

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

Uploading School 2 LA.xml (Processed 0 of 2)

FILE UPLOAD PROGRESS ...

Data return upload in progress, please wait....

Loading raw return data, 132 elements processed

File name	Level Tag	Level Value	Organisation Type	Native ID Tags	Native ID	Source Organisation	Upload Result
-----------	-----------	-------------	-------------------	----------------	-----------	---------------------	---------------

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

Viewing the return details

Select a return from the 'agent' screen by clicking on school row and click on 'open return' to view it.

COLLECT Portal

Agent Page SchoolCensus 2016_Spring

Filter By: Name Native ID Status Org Group Queue

Performance summary								
Expected	Outstanding	Submitted	Approved	Authorised	Errors			OK
					E	Q		
41	40	1	0	0	58	25	0	

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Amended_by_agent	21/12/2015				58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

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

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

When you click on the 'view all' for pupils on roll this takes you into the pupil section. This displays the 'records; list', with all pupils visible. You can use the filter bar to identify a particular pupil. Or click on the headers to sort alphabetically.

UPN	SurnameForename	DOB	Pupil Enrolment Status	Pupil Errors	Address	Termly Sessions	Summer Sessions	Annual Sessions	Exclusions	Post 16	FSM
-----	-----------------	-----	------------------------	--------------	---------	-----------------	-----------------	-----------------	------------	---------	-----

Editing data within the return

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

COLLECT Portal

SC16 Spring

All Errors All Notes Add View Edit Delete Status

- SC16 Spring [7]
- Levels
- School [40]
 - > Special School
 - > Address
 - > Admission Appeals
 - > Characteristics
 - > Infant Admission Appeals
 - > Miscellaneous
 - > Reconciliation
 - Classes [5]
 - Provisions
 - Childcare
 - Pupils On Roll [43]
 - > Characteristics
 - > Identifiers
 - > SEN
 - > Status
 - > Termly Attendance
 - SEN Needs [5]
 - Termly Exclusions [2]
 - Addresses [2]
 - Termly Session Details
 - Free School Meals Period [1]
 - Learner Support [2]

SC16 Spring - TDU Test Secondary 1

Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		1	16	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Spring 2016					
Collection	SC	0	0	0	
Term	SPR	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-01-21	3	4	0	
Source Level	S	0	0	0	
JA	520	1	0	0	
Estab	4001	0	0	0	
Software Code	MadeItUp	0	0	0	
Release	1.0	0	0	0	
Xversion	1	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-06-23 09:56:58	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.

Agent Page SchoolCensus 2016_Spring

Filter By:		Name	Native ID	Status	Org Group	Queue	Go	Reset	
Performance summary									
Expected	Outstanding	Submitted	Approved	Authorised	Errors				
41	40	0	1	0	E	Q	OK		
					58	25	0		
Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015			58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

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.

COLLECT Portal									
Blade Error Report - SchoolCensus 2016_Spring									
TDU Test Secondary 1									
Error report on 30/12/2015 at 09:59									
							Count 83	Return	
Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Field	Value	Details	
		Invalid Code Value	Errors			SENProvision	K-SEN Support		
1741		Based on Ministry of Defence criteria, Service Children (i.e. parents designated as personnel category 1 or 2) are not eligible for Free School Meals.	Errors						
1510		UPN invalid (wrong check letter at character 1)	Errors						
1876		School lunch taken only required from pupils in reception, year 1 or year 2 or from pupils aged 4 to 6 in year X.	Errors						
		TopUpFunding is mandatory	Errors						
		Invalid Code Value	Errors						
2170		A valid SEN type must be provided for pupils with a SEN provision = K, S or E	Errors						
1860		Enrolment Status is missing or invalid	Errors						
2170		A valid SEN type must be provided for pupils with a SEN provision = K, S or E	Errors						
1570		Unique Learner Number must be provided for pupils aged 14 and over on Census Day	Errors						

Correcting errors

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

Either:

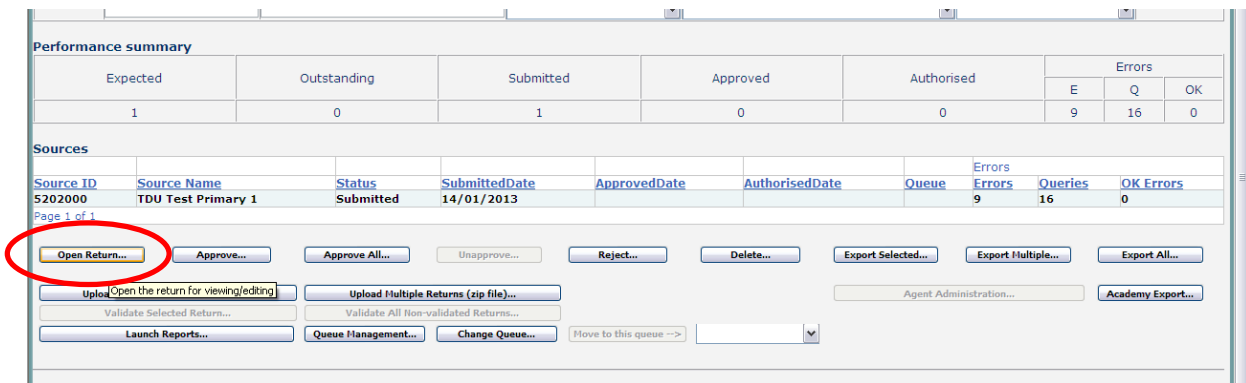
- 1) Contact the relevant school – advise they need to correct in their MIS and re-load their school census file to COLLECT, overwriting the incorrect one.
- 2) Change the mode of the form to 'edit' and then click on the data item that needs to be changed and update it – ensuring the school reflect this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

Updating class information

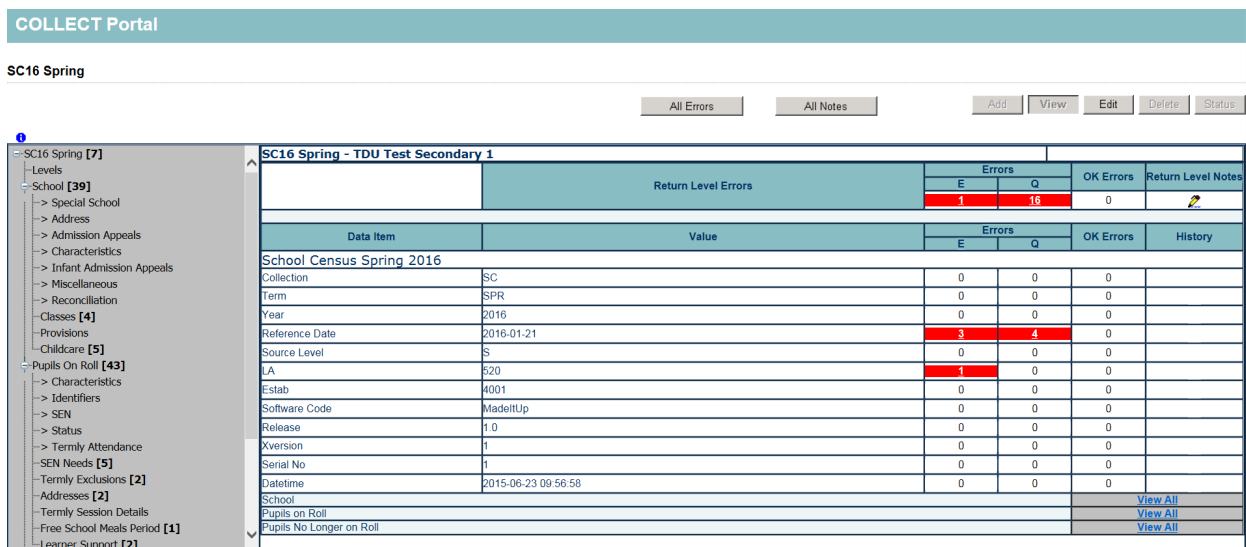
The census collects information regarding all classes running at the selected time on census day. The infant class guidance states that the ‘School Standards and Framework Act’ limit the size of an infant class during an ordinary teaching session to 30 pupils per teacher. The calculation is based on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

There are certain exceptions to the limit as specified in the school census guidance. There is also additional infant class instructions available on the website to assist schools/local authorities. These exceptions need to be manually entered into COLLECT once double checked it is correct. Please follow the steps below to do this:

1) Once logged into COLLECT, select the correct school and ‘open return’



2) Click on the school ‘view all’ link



3) Now click on the classes ‘view all’

School - Characteristics

All Errors All Notes Add View Edit Delete Status

- SC16 Spring [7]
- Levels
- School [39]
 - > Special School
 - > Address
 - > Admission Appeals
 - > Characteristics
 - > Infant Admission Appeals
 - > Miscellaneous
 - > Reconciliation
 - > Classes [4]
 - > Provisions
 - > Childcare [5]
 - Pupils On Roll [43]
 - > Characteristics
 - > Identifiers
 - > SEN
 - > Status
 - > Termly Attendance
 - SEN Needs [5]
 - Termly Exclusions [2]
 - Addresses [2]
 - Termly Session Details
 - Free School Meals Period [1]
 - Learner Support [2]

School - Characteristics - TDU Test Secondary 1						Drill Up	Error
School Name						All Notes	
SOME SCHOOL		49 - Academies		NE11 1AA		39	
School Characteristics	Special School	School Address	Admission Appeals	Infant Admissions Appeals	Pupil Reconciliation	Miscellaneous	
Data Item	Value			Errors		OK Errors	History
				E	Q		
School Name	SOME SCHOOL			0	0	0	
School Phase	AT - All Through			31	8	0	
School Type	49 - Academies			0	0	0	
Maximum Year Group	11 - Year 11			0	0	0	
Minimum Year Group	1 - Year 1			0	1	0	
Intake Type	COMP - Comprehensive			31	8	0	
Governance	CA - Academies			31	8	0	
School Email Address	hobody@abc.com			0	0	0	
School Telephone Number	01234567890			0	0	0	
Child Mothers				0	0	0	
Teen Mother Places				0	0	0	
Childcare Places				0	0	0	
Classes							View All

4) Select the class with the unlawful size by clicking on it, then click 'edit'

All Errors All Notes Add View Edit Delete Status

- SC16 Spring [7]
- Levels
- School [40]
 - > Special School
 - > Address
 - > Admission Appeals
 - > Characteristics
 - > Infant Admission Appeals
 - > Miscellaneous
 - > Reconciliation
 - > Classes [5]
 - > Provisions
 - > Childcare
 - Pupils On Roll [43]
 - > Characteristics
 - > Identifiers
 - > SEN
 - > Status
 - > Termly Attendance
 - SEN Needs [5]
 - Termly Exclusions [2]
 - Addresses [2]
 - Termly Session Details

Classes - TDU Test Secondary 1						Drill Up	Error	
> SOME SCHOOL, 2 Flat, 123						All Notes		
Class Reference Name		Class Key Stage		Class Year Group		Number of Pupils from the host school in class		Rule Errors
Test 1		1 - Key Stage 1		1 - Year 1		31		3
Test 2		1 - Key Stage 1		1 - Year 1		29		2
Data Item	Value			Errors		OK Errors	History	
				E	Q			
Class Reference Name	Test 1			0	0	0		
Number of Teachers in Class				2	0	0		
Number of Adult Non Teachers in Class				2	0	0		
Class Year Group	1 - Year 1			0	0	0		
Class Type	0 - Not a nursery class			0	0	0		
Class Key Stage	1 - Key Stage 1			0	0	0		
Class Activity	MA - Mathematics or Numeracy			0	0	0		
Number of Pupils from the host school in class	31			0	0	0		
Number of Pupils from other schools in the class	0			0	0	0		
The number of teachers on PPA time	1			0	0	0		
The number of pupils who are on exception A				0	0	0		
The number of pupils who are on exception B				0	0	0		
The number of pupils who are on exception C				0	0	0		
The number of pupils who are on exception D	1			0	0	0		
The number of pupils who are on exception E				0	0	0		
The number of pupils who are on exception F				0	0	0		
The number of pupils who are on exception G				0	0	0		
The number of pupils who are on exception H				0	0	0		

Enter either, an increase in teachers or the amount of teachers on planning and preparation time (PPA) also known as learning manager time (LMT) or the amount of pupils admitted under each exception. Please note it is important that 'exceptions' are reported correctly, for example 'fair access' does not come under any of the exceptions categories therefore please liaise with local authority colleagues in school admissions.

5) Then click 'view' to save. The query will now have cleared from the return for that class.

Classes

All Errors All Notes Add View Edit Delete Status

> SOME SCHOOL, 2 Flat, 123

SC16 Spring [7]
Levels
School [37]
-> Special School
-> Address
-> Admission Appeals
-> Characteristics
-> Infant Admission Appeals
-> Miscellaneous
-> Reconciliation
Classes [2]
Provisions
Childcare
Pupils On Roll [43]
-> Characteristics
-> Identifiers
-> SEN
-> Status
-> Termly Attendance
SEN Needs [5]
Termly Exclusions [2]
Addresses [2]
Termly Session Details

Classes - TDU Test Secondary 1 Drill Up Error

Class Reference Name	Class Key Stage	Class Year Group	Number of Pupils from the host school in class	Rule Errors
Test 1	1 - Key Stage 1	1 - Year 1	31	0
Test 2	1 - Key Stage 1	1 - Year 1	29	2

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

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 [School Census 2016](#) web page) about a data value when an item has an associated query against it.

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

You can add notes in “return level notes query.”

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

COLLECT Portal

SC16 Spring

All Errors All Notes Add View Edit Delete Status

Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		1	16	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Spring 2016					
Collection	SC	0	0	0	
Term	SPR	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-01-21	3	4	0	
Source Level	S	0	0	0	
LA	520	1	0	0	
Estab	4001	0	0	0	
Software Code	MadettUp	0	0	0	
Release	1.0	0	0	0	
Xversion	1	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-06-23 09:56:58	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

- 2) Click add new note

Note Detail

Add New Note Remove Note

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 schools return.

You can enter one note to cover numerous queries.

Eg – 3 x 2020Q – confirmed correct, 1 x 1780Q – confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in autumn term.

Approving the return

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

To 'Approve' a return:

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

COLLECT Portal

Agent Page SchoolCensus 2016_Spring

Filter By: Name Native ID Status Org Group Queue

Performance summary						Errors		
Expected	Outstanding	Submitted	Approved	Authorised	E	Q	OK	
41	40	1	0	0	58	24	0	

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Amended_by_agent	21/12/2015				58	24	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

Once selected, approve the return by clicking the approve (approve the highlighted single return) or approve all (approves all returns at submitted stage) button.

Screen information will be updated:

COLLECT Portal

Agent Page SchoolCensus 2016_Spring

Filter By: Name Native ID Status Org Group Queue

Performance summary						Errors		
Expected	Outstanding	Submitted	Approved	Authorised	E	Q	OK	
41	40	0	1	0	58	24	0	

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015			58	24	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

The status of the return will be set to 'approved' and the 'date approved' will be completed

The 'approved' total in the performance summary will increase by 1 and the 'submitted' count will decrease by 1

The approve button will now be disabled for this return

The unapprove button will now be enabled.

Queues

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

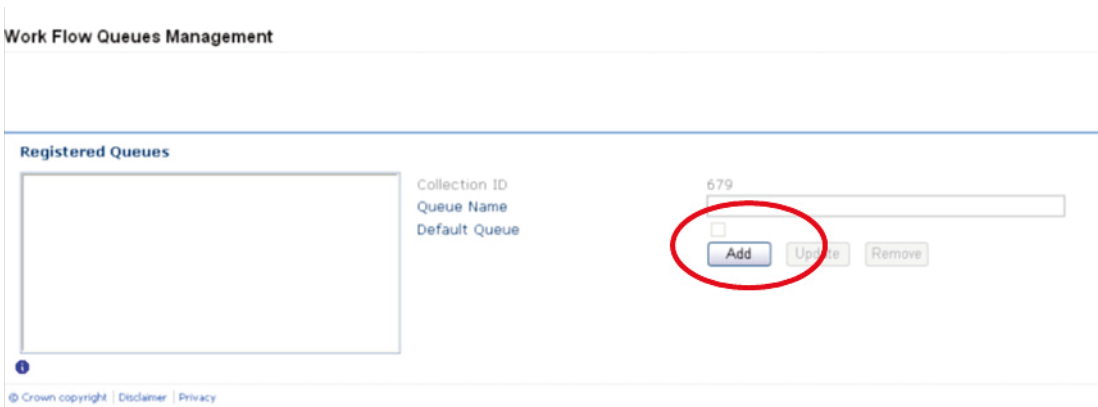
The use of 'queues' helps in the allocation and identification of who is working on which files and therefore helps to ensure that two or more people don't try and work on the same file.

- 1) From the agent page click the queue management button.



This will take you to the page entitled 'work flow queues management'

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



- 3) Type your name (or the name of a colleague) into the 'queue name' box then click ok. (Instead of a name you may wish to apportion schools by a day of week or by some other description depending on your local authority's validation procedures).

The name/description will now be displayed in alphabetical order in the 'registered queues' box.



Use the update button to modify a selected name/description.

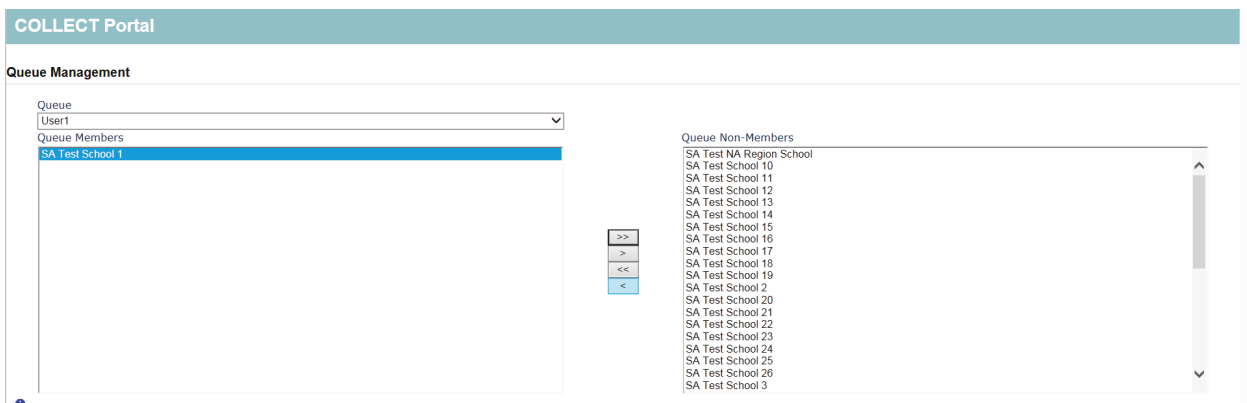
The remove button allows you to remove a name/description from the 'registered queues' list. However, this can only be done if any schools linked with a particular name are removed first.

NB: The check-box used to set the 'default queue' was originally intended to allow a default queue to be allocated for a workflow stage; however the emerging requirement for the use of queues is for local authority's to assign their own, as they work in different ways. It is therefore not applicable and has no effect on queues.

Return to the agent page by selecting back to my COLLECT page at the top of the page and click the change queue button to go to the screen entitled 'queue management'

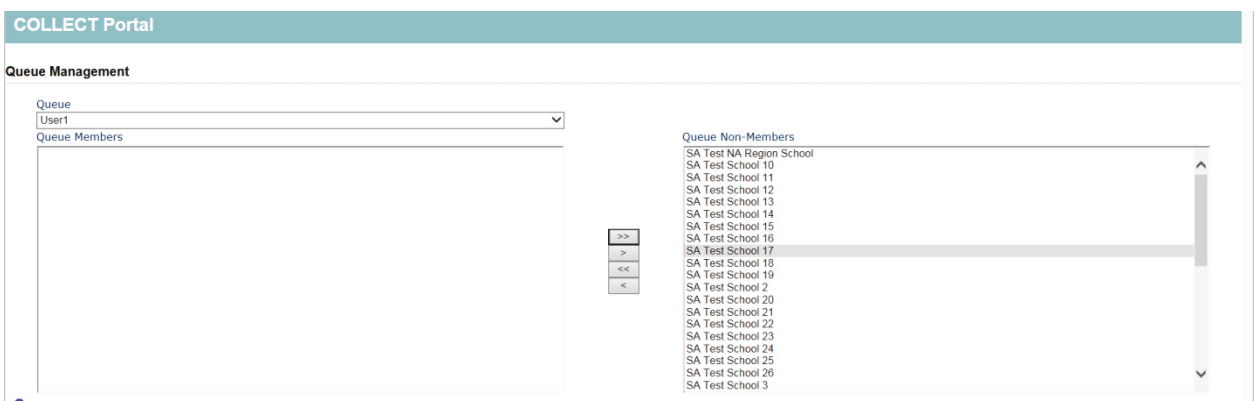


1) You can now select and add or remove schools to and from different queues (click the right hand down arrow alongside the 'queue' box to see a drop down list of names).



2) Highlight a school in the 'queue non-members' box and press the < button. This school will now appear in the box of 'queue members'.

< or > will move individual schools or a group of schools selected in the direction of arrow. << or >> will move all schools in direction of arrows (although you will first be prompted to confirm this global move).



Return to the agent page by selecting back to my COLLECT page at the top of the page and you will see that selected school has now been assigned to the selected queue.

* An alternative way to attach a school to a particular person is to highlight the school (under 'source name') then click the move to this queue button. This can be a safer way to allocate schools to queues because you can see if any schools are already allocated to another queue first.



Reports

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

Agent Page SchoolCensus 2016_Spring

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

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	0	1	0	58	24	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015			58	24	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

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

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

Validate Selected Return... Validate All Non-validated Returns...

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

2) A drop down menu will be display and a report can be selected from that drop down list

It is extremely important that you run all of these reports as they may highlight anomalies within the data which can impact on all funding calculations.

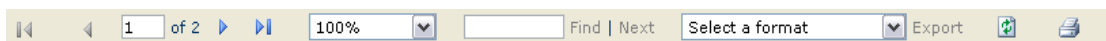
Duplicate reports will indicate pupils who are registered at more than one school and therefore would indicate if the pupil should remain on roll or whether the registration status has been recorded incorrectly.

In spring and autumn school census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your local authority/schools as each pupil is funded only once.

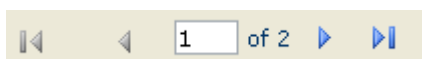
There will be [individual user guides](#) for reports available on the education website.

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

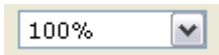
Along the top of the report you will see a toolbar with various functions.



These are explained as follows:



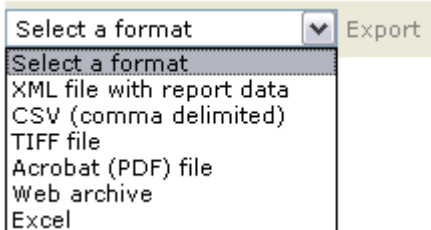
Allows you to navigate between pages of the report.



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 agent page there are three export options.

- 1) Export selected – one school
- 2) Export multiple – up to 10 schools
- 3) Export all – all schools



Export selected

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

Export multiple

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

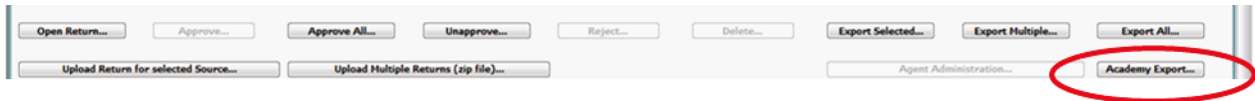
Export all

- 1) Click on export all

Academy export

Local authorities have a function within COLLECT to export all 'authorised' academy data, there is a report available in COLLECT which will provides details of which academies have been authorised by the department. It is strongly recommended you run this report prior to exporting. The export contains a sub-set of data agreed by the academies team, anything not contained within the export the department for education are unable to share.

1) Click on academy export



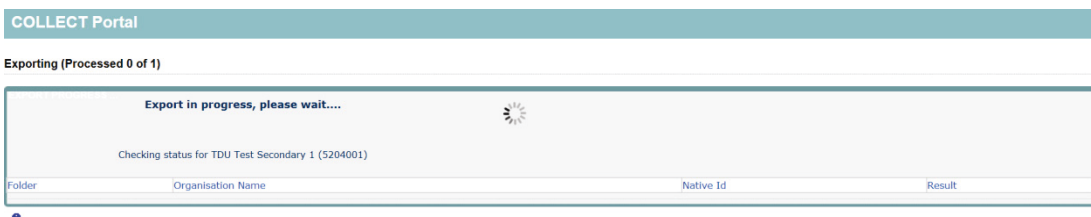
Selecting format

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

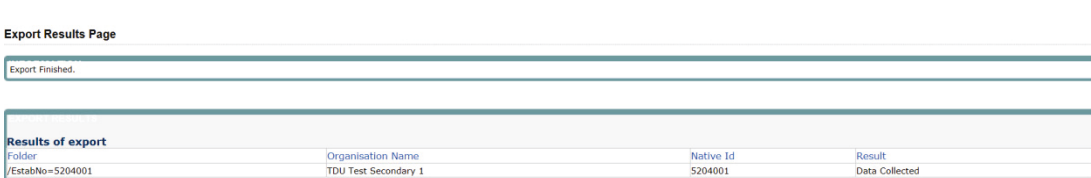
1) Choose to export in either xml or csv format, then click on the export button.

A screenshot of a dialog box titled 'CHOOSE EXPORT FORMAT'. The main heading is 'Export the current data for the selected Source'. Below this, it says 'Please select the format that you wish to export this data:'. There are two radio buttons: 'Export as XML' (selected) and 'Export as CSV'. Below that, it says 'Please Select the Status that you wish to export this data: Either:'. There are two options: 'All' (with a checked checkbox) and 'Or one or more of the following'. Under 'Or one or more of the following', there is a list of status options with checkboxes: 'Loaded', 'Amended by source', 'Submitted', 'Amended by agent', 'Approved', 'Amended by collector', and 'Authorised'. At the bottom of the dialog, there is a blue 'Export' button circled in red.

2) 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.

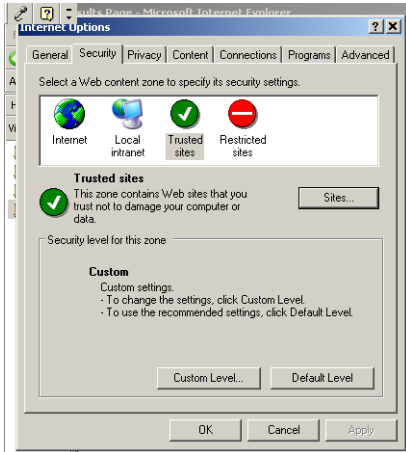


Important note: if the export process fails, with a message stating that Internet explorer has blocked download of a file, you might succeed if you try again.

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.



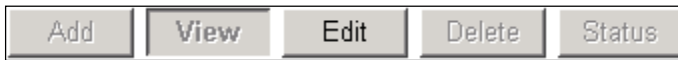
Navigation controls

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, e.g. history and errors	Returns you to the previous screen
Back	Notes screens	Returns you to the previous screen
View all	Data entry screens that have additional linked data.	Takes you to the sub module level details

Mode buttons

Those buttons determine which operation mode the on-screen data form is in, and which operations are available.



Dark grey text on sunken button with light border = 'Active' mode

Black text on button and highlighted border = 'Available' mode

Light grey text on button with light border = 'Unavailable' mode

Help

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



Department
for Education

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