



Department
for Education

School census 2015 to 2016

COLLECT guide for maintained schools

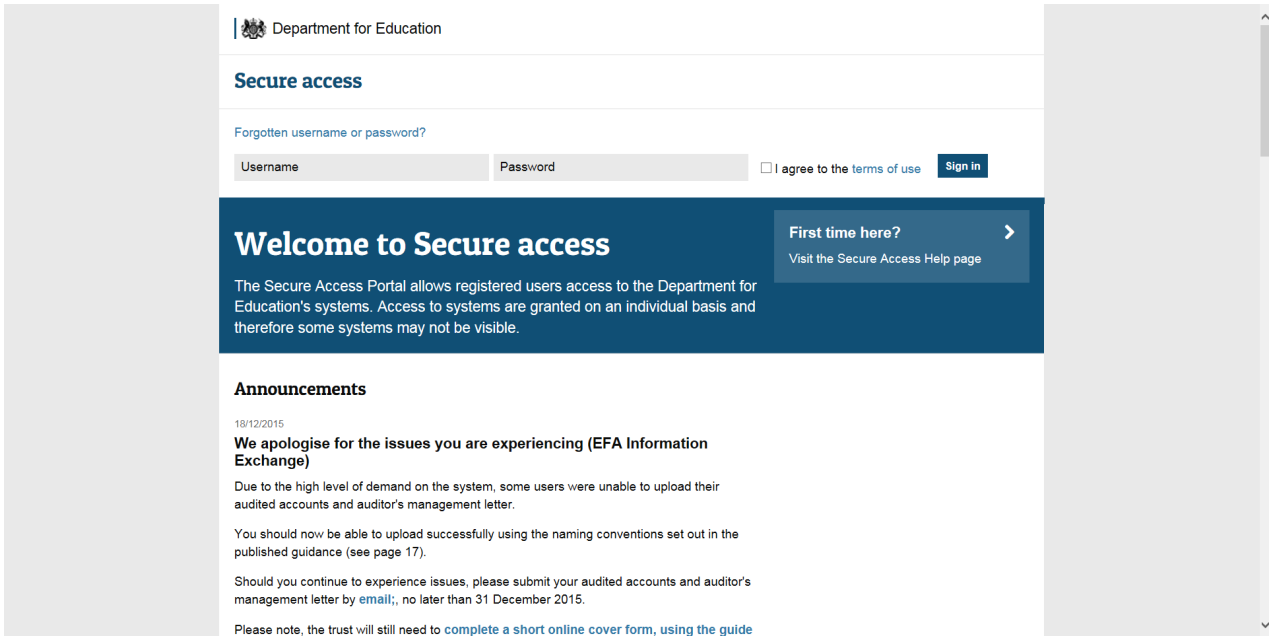
May 2016

Contents

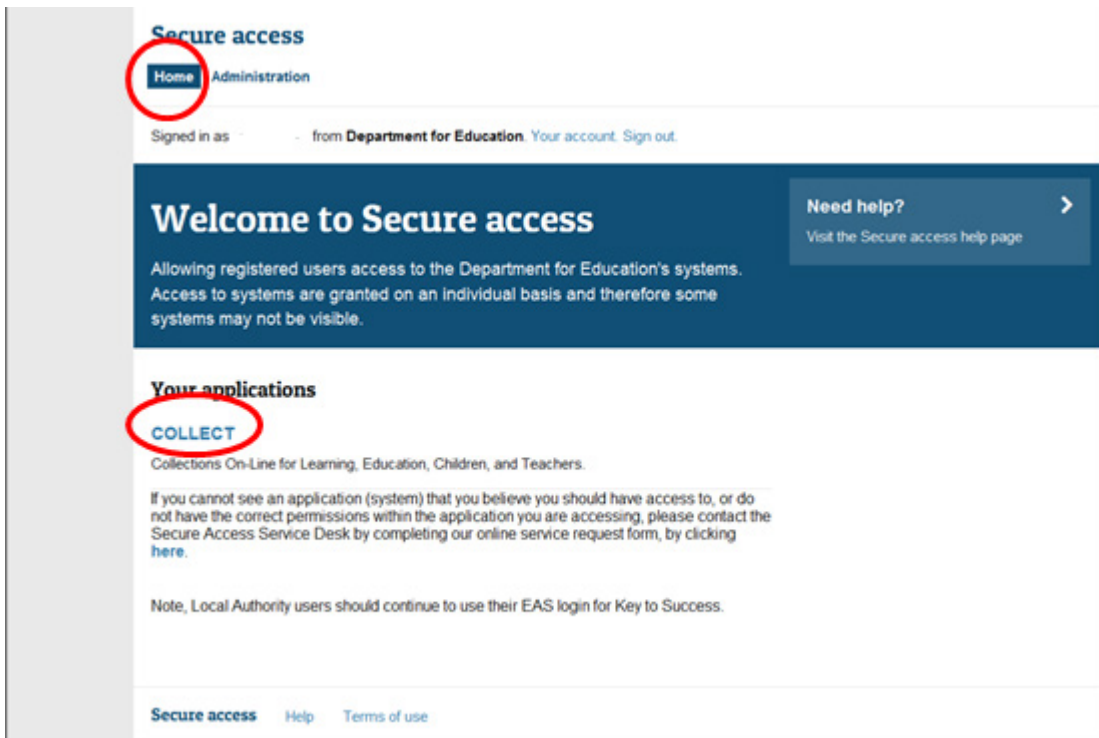
COLLECT and secure access	3
Source	5
Loading a return	6
Viewing the return details	8
Editing data within the return	9
Errors	10
Total return errors	10
Return level errors	10
To view all errors and queries on the return	11
Correcting errors	11
Providing clarification/ supplementary information	12
Submitting the return	14
Reports	16
Exporting a return	18
Screen functionality	20
Screen navigation	20
Navigation controls	20
Mode buttons	21
Help	22

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.

Department for Education
 You are logged in as ****** [Log out](#)

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.

[PROCEED INTO COLLECT](#)
[Continue...](#)
[Code of Conduct](#)
[Show Code of Conduct Text...](#)

BLADE UAT COLLECT Portal

Home Page

Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2016_Summer	Agent	Department for Education	Testing	19/05/2016 00:00:00	34
SchoolCensus 2016_Summer	Collector	Department for Education	Testing	19/05/2016 00:00:00	34
SchoolCensus 2016_Summer	Administrator	Department for Education	Testing/Live	19/05/2016 00:00:00	34
SchoolCensus 2016_Spring	Agent	Department for Education	Open	21/01/2016 00:00:00	-85
SchoolCensus 2016_Spring	Collector	Department for Education	Open	21/01/2016 00:00:00	-85
SchoolCensus 2015_Summer	Collector	Department for Education	Open	21/05/2015 00:00:00	-330
SchoolCensus 2015_Summer	Agent	Department for Education	Open	21/05/2015 00:00:00	-330
SchoolCensus 2015_Spring	Agent	Department for Education	Open	15/01/2015 00:00:00	-456
SchoolCensus 2015_Spring	Collector	Department for Education	Open	15/01/2015 00:00:00	-456
SchoolCensus 2015_Spring	Source	DfE Secondary Academy	Open	15/01/2015 00:00:00	-456

Page 1 of 3

[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.

Source

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

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

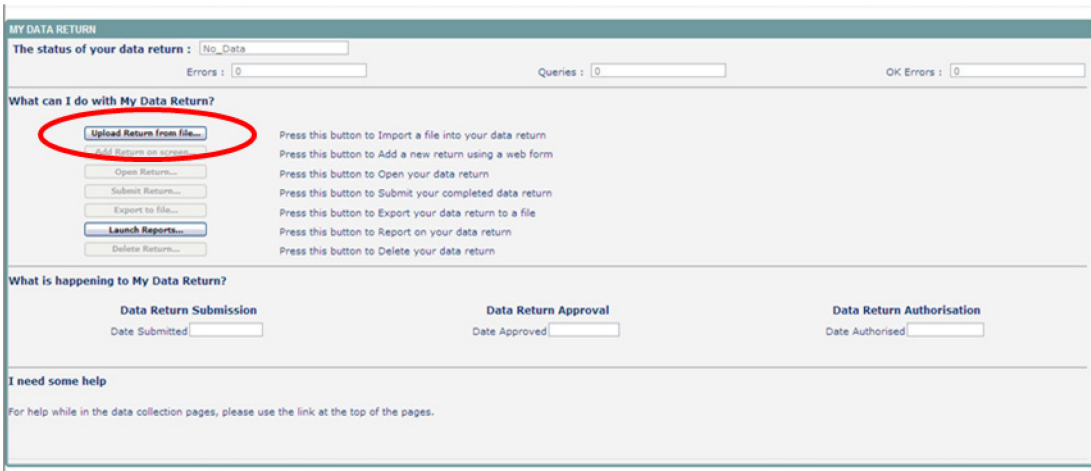
Data Return Submission Date Submitted <input type="text"/>	Data Return Approval Date Approved <input type="text"/>	Data Return Authorisation Date Authorised <input type="text"/>
--	---	--

I need some help

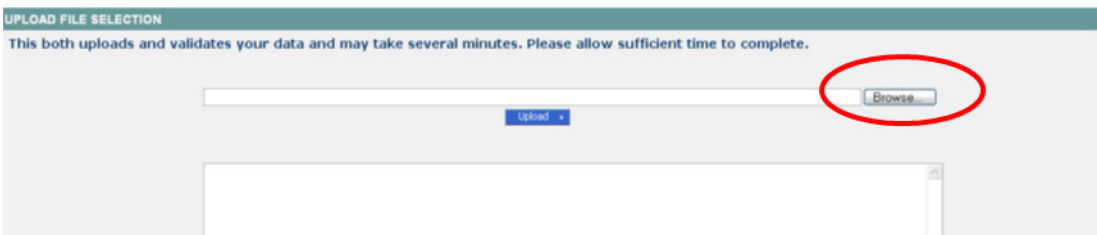
For help while in the data collection pages, please use the link at the top of the pages.

Loading a return

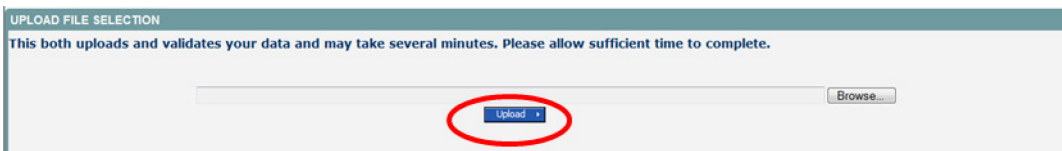
1) Click on upload return from file



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



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

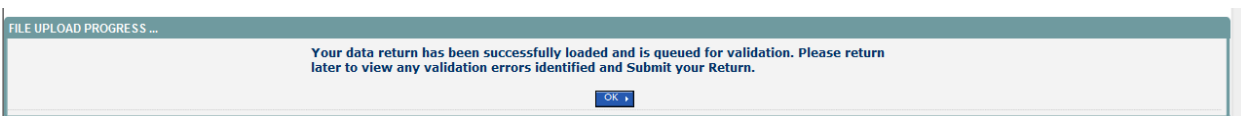


A progress message may be displayed while the upload is taking place.

Uploading School1.xml



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



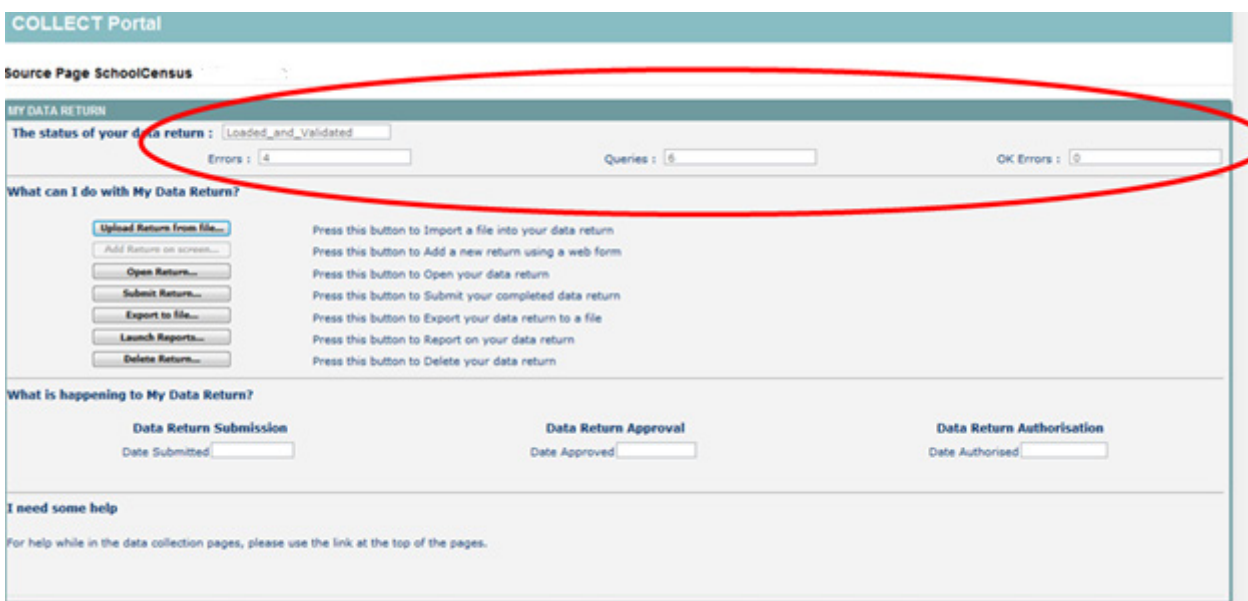
This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

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

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

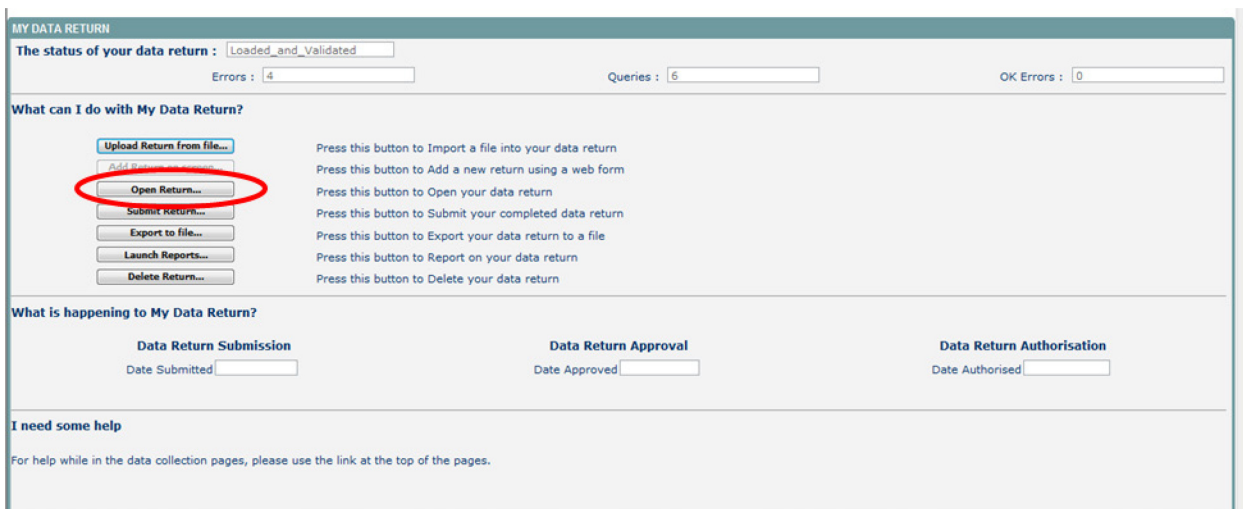
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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

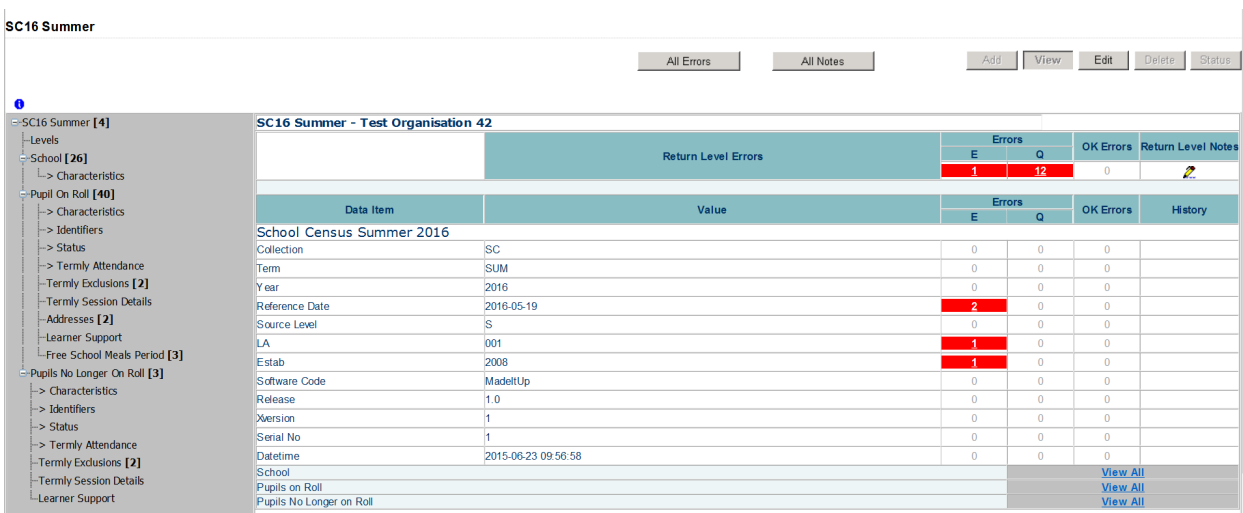


Viewing the return details

1) To view your data return click on 'open return'.



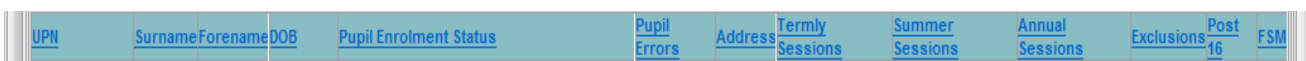
Your return will then be displayed



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



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



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.

		Errors		OK Errors	Return Level Notes
		E	Q		
Return Level Errors		1	12	0	
Data Item	Value	Errors		OK Errors	History
School Census Summer 2016					
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-05-19	2	0	0	
Source Level	S	0	0	0	
LA	001	1	0	0	
Estab	2008	1	0	0	
Software Code	MadellUp	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

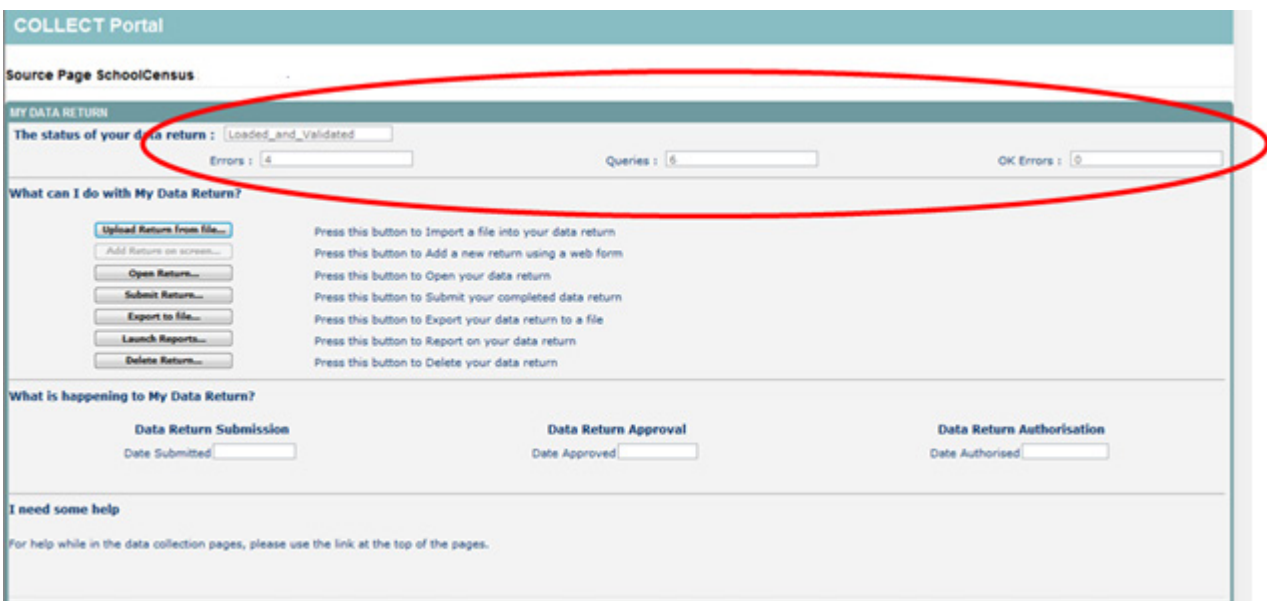
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

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.



Return level errors

Return level errors relate to a validation rule that applies to the return as a whole rather than an individual data item within the return.

	Return Level Errors	Errors		OK Errors	Return Level Notes
		E	Q		
		0	6	0	

The table shows a summary of return level errors. The 'Return Level Errors' section is highlighted in teal. The 'Errors' section is further divided into 'E' (Errors) and 'Q' (Queries). The 'Q' value is highlighted in red. The 'Return Level Notes' column contains a pencil icon.

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 UAT COLLECT Portal						
Blade Error Report - SchoolCensus 2016_Summer						
Test Organisation 24		Error report on 15/04/2016 at 12:00			Count 59	Return Details
Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Field Value
1855		Hours at Setting is missing or invalid for 2, 3 or 4 year old child.	Errors		Details	Boarder N - Not a boarder
130		D/E Number and Phase are not consistent	Errors		Details	DOB Nov 21 1999 12:00AM
150		School Type and Phase not consistent	Errors		Details	Entry Date Nov 27 2015 12:00AM
1510		UPN invalid (wrong check letter at character 1)	Errors		Details	Governance CA - Academies
2020Q		Please check: pupil year group and age inconsistent	Queries		Details	Intake COMP - Comprehensive
2500		For pupil on roll the attendance sessions possible is missing or invalid.	Errors		Details	Phase AT - All Through
1854		Child's Hours at Setting must not be provided for pupil aged 5 and over	Errors		Details	TermlySessionsPossible 0
1859		Funded hours cannot be more than the Hours at Setting	Errors		Details	
1859		Funded hours cannot be more than the Hours at Setting	Errors		Details	
2502Q		Zero attendance sessions possible recorded for Pupil on Roll. Pupil should only be recorded with zero sessions possible if dually registered and spent all of the previous term for which attendance data is being collected at other registration. This query will be accepted by D/E on condition that a suitable explanatory notepad entry is provided in COLLECT	Queries		Details	

Page 1 of 6 1 2 3 4 5 6

Correcting errors

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

Either:

- 1) Correct in your MIS and re-load the school census file to COLLECT, overwriting the incorrect one.
- 2) If your local authority agrees - change the mode of the form to 'edit' and then click on the data item that needs to be changed and update it – ensuring the you reflect this change in the MIS.

Providing clarification/ supplementary information

In some instances you will be requested to provide explanatory information . This will be made available on our web page [School Census 2016](#))

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

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

The screenshot shows the 'SC16 Summer' interface. At the top, there are buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. Below this is a navigation tree on the left with categories like 'Levels', 'School [26]', 'Pupil On Roll [40]', etc. The main area displays 'SC16 Summer - Test Organisation 42'. It features a table for 'Return Level Errors' with columns for 'E', 'Q', 'OK Errors', and 'Return Level Notes'. Below this is a table for 'School Census Summer 2016' with columns for 'Data Item', 'Value', 'E', 'Q', 'OK Errors', and 'History'. The 'Return Level Errors' table shows 1 error in 'E' and 12 in 'Q'. The 'School Census Summer 2016' table lists various data items like 'Collection', 'Term', 'Year', etc., with corresponding values and error counts.

- 2) Click add new note

The screenshot shows the 'Note Detail' form. At the top right, there is a button labeled 'Add New Note' which is circled in red. Below the form, there is a section for 'Preserved notes deleted by resubmissions' with columns for 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. At the bottom, there is a 'Preserved Note Detail' section.

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

The screenshot shows the 'Create New Note' form. It has a text area for entering the note and error number. At the bottom, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is circled in red.

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

You can enter one note to cover numerous queries.

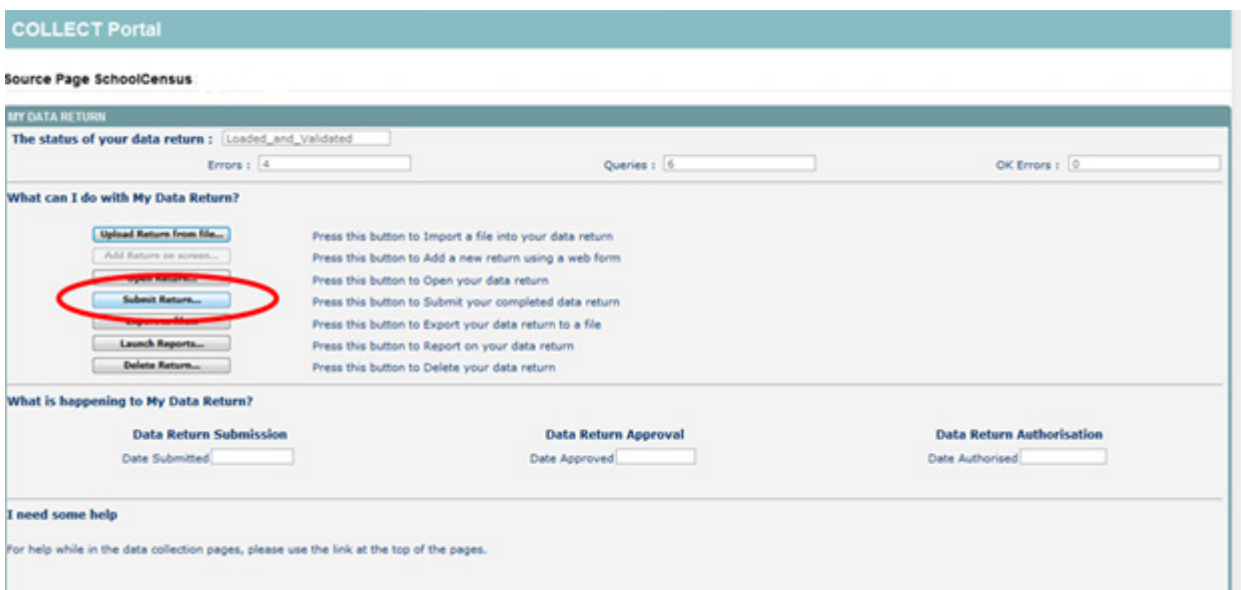
E.g. – 3 x 2020Q – confirmed correct, 1 x 1780Q – confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in spring term.

Submitting the return

The school is responsible for 'submitting' the return once the data has been checked and any explanatory notes have been added. By submitting the return the school have indicated that the head teacher has checked the return for accuracy and completeness and therefore authorising the submission to be used by the department.

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

Source Page SchoolCensus

MY DATA RETURN

The status of your data return : **Submitted**

Errors :

Queries :

OK Errors :

What can I do with My Data Return?

Upload Return from file...

Press this button to Import a file into your data return

Add Return on screen...

Press this button to Add a new return using a web form

Open Return...

Press this button to Open your data return

Submit Returns...

Press this button to Submit your completed data return

Export to file...

Press this button to Export your data return to a file

Launch Reports...

Press this button to Report on your data return

Delete Return...

Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission

Date Submitted:

Data Return Approval

Date Approved:

Data Return Authorisation

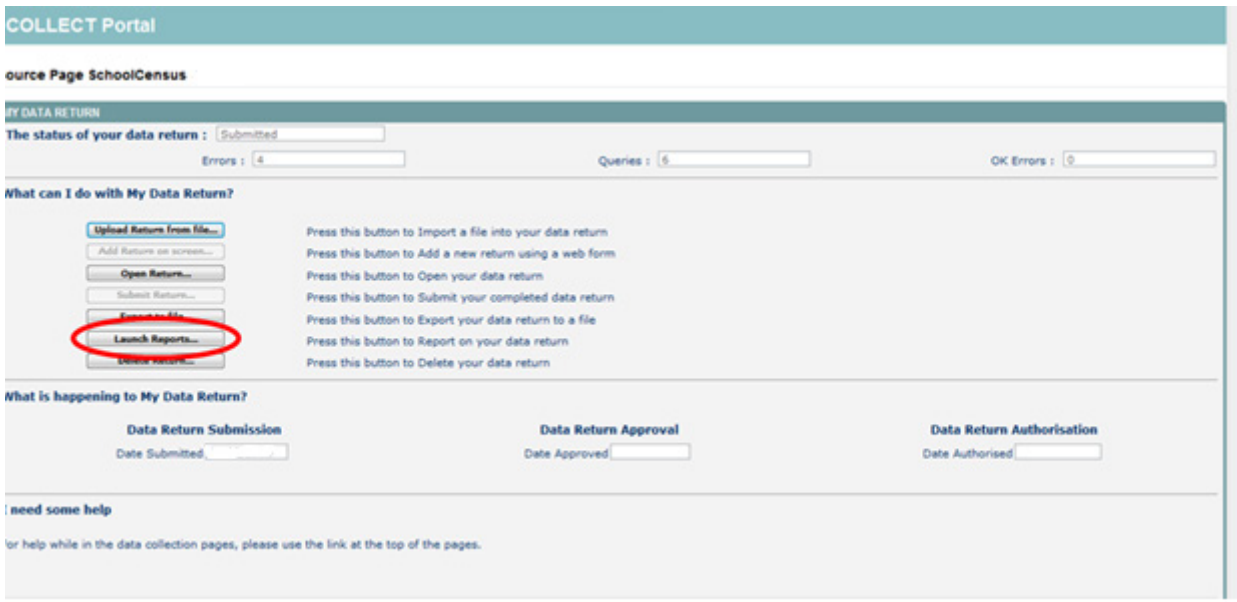
Date Authorised:

I need some help

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

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

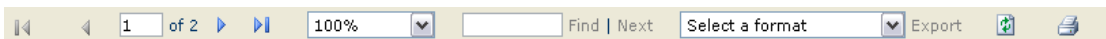
You should now run your reports and check that you agree with the listed figures. If you do not agree with the reported figures it could indicate that there is missing and/or incorrect data in your return. The local authority also has access to your reports and therefore you may consult them on any queries.

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

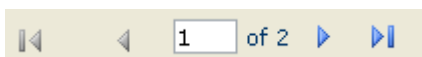
[School Census 2016](#)

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

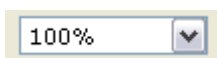
Along the top of the report you will see a toolbar with various functions.



These are explained as follows:



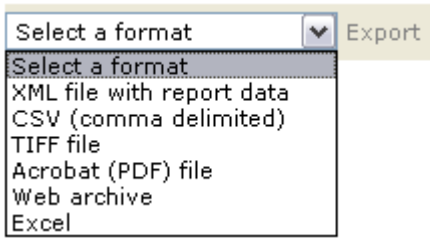
Allows you to navigate between pages of the report.



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.

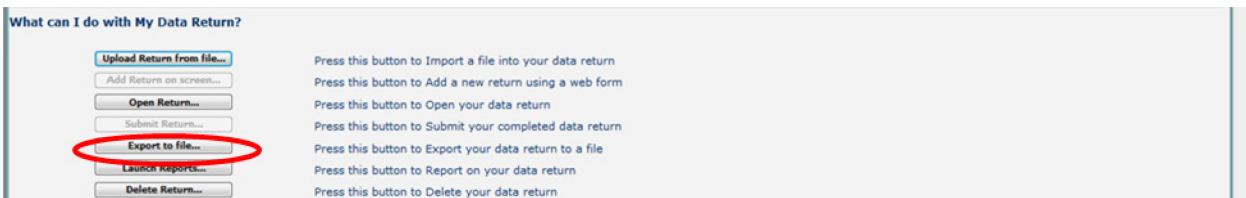
Exporting a return

A return can be exported in XML or CSV format

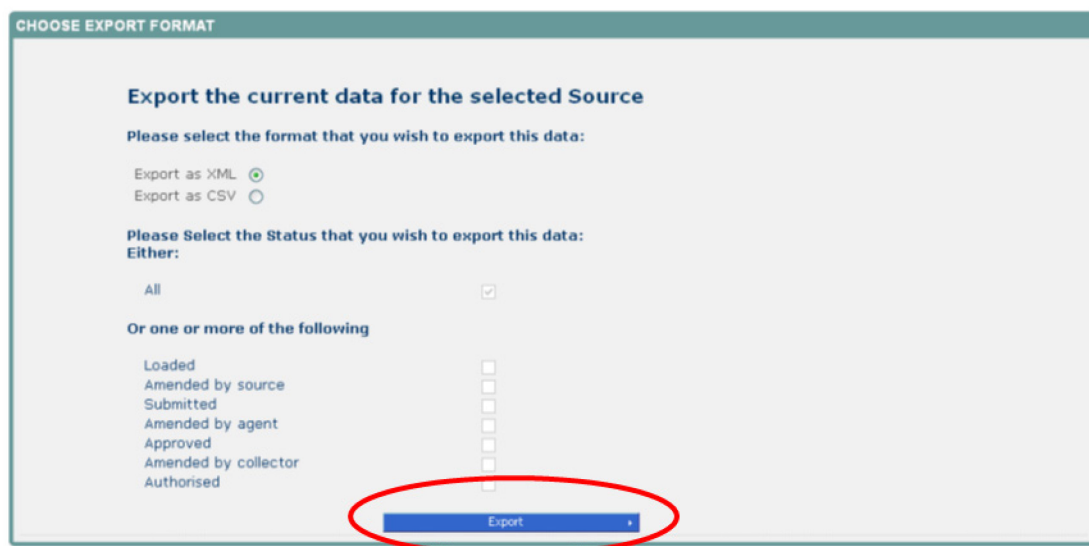
Exporting a return (current state)

On the source page

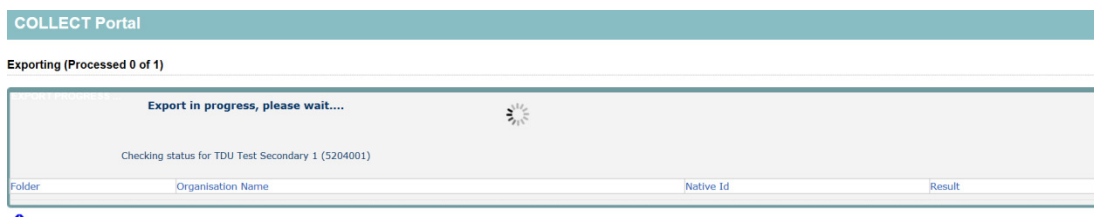
1) Click on export to file



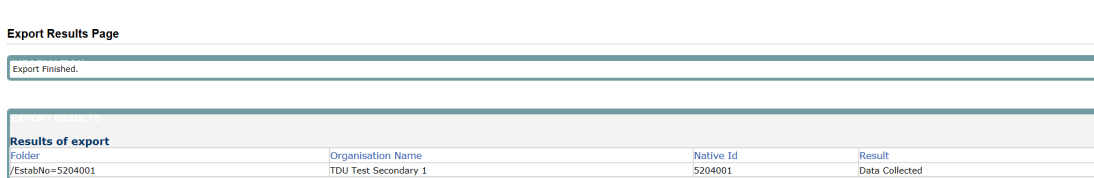
2) Choose to export in either XML or CSV format, then click on the export button.



3) A progress message will be displayed



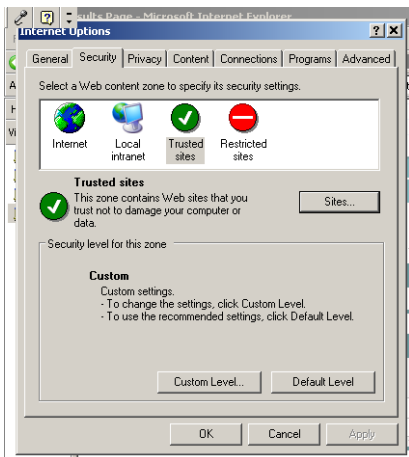
When completed the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



Important note: If the export process fails, with a message stating that internet explorer has blocked the 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.



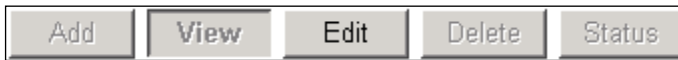
Navigation controls

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



Department
for Education

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