



Department
for Education

School census 2016

COLLECT guide for maintained schools

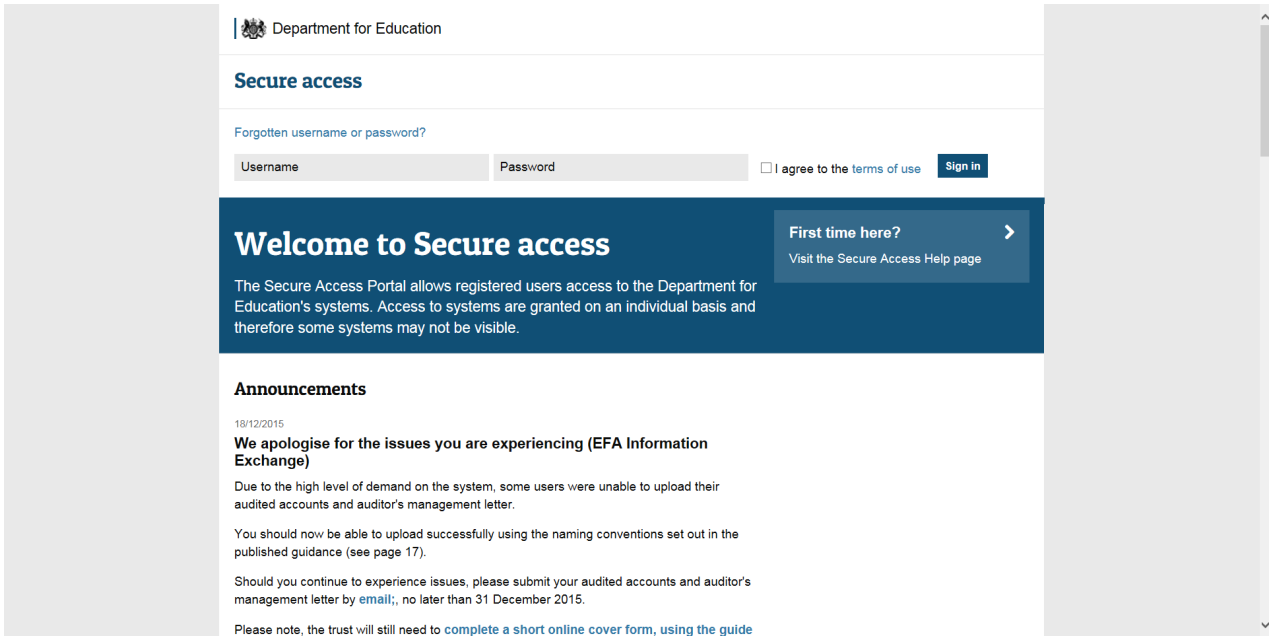
September 2016

Contents

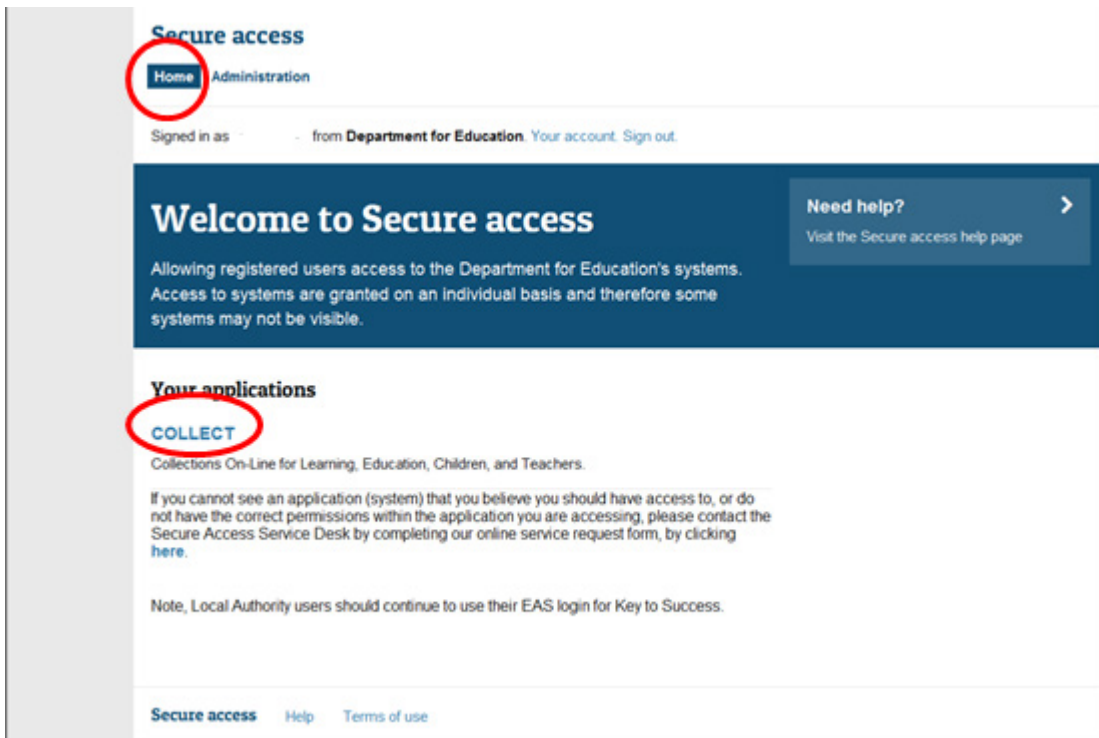
COLLECT and secure access	3
Source	5
Loading a return	5
Viewing the return details	7
Editing data within the return	9
Errors	9
Total return errors	10
Return level errors	10
To view all errors and queries on the return	10
Correcting errors	11
Providing clarification/ supplementary information	11
Submitting the return	13
Reports	15
Exporting a return	17
Screen functionality	19
Screen navigation	19
Navigation controls	19
Mode buttons	20
Help	20

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.



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.



Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2014_Summer	Collector	Department for Education	Testing	15/05/2014 00:00:00	-830
SchoolCensus 2015_Autumn	Agent	Department for Education	Testing	01/10/2015 00:00:00	-326
SchoolCensus 2015_Autumn	Collector	Department for Education	Testing	01/10/2015 00:00:00	-326
SchoolCensus 2015_Autumn	Administrator	Department for Education	Testing/Live	01/10/2015 00:00:00	-326
SchoolCensus 2016_Autumn	Collector	Department for Education	Testing	06/10/2016 00:00:00	45
SchoolCensus 2016_Autumn	Administrator	Department for Education	Testing/Live	06/10/2016 00:00:00	45
SchoolCensus 2016_Spring	Agent	Department for Education	Testing	21/01/2016 00:00:00	-214
SchoolCensus 2016_Spring	Collector	Department for Education	Testing	21/01/2016 00:00:00	-214
SchoolCensus 2016_Spring	Administrator	Department for Education	Testing/Live	21/01/2016 00:00:00	-214
SchoolCensus 2016_Summer	Administrator	Department for Education	Open/Live	19/05/2016 00:00:00	+95

Page 7 of 8

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 : [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
- 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: []

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

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
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What is happening to My Data Return?

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Date Submitted: []	Date Approved: []	Date Authorised: []

I need some help

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

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

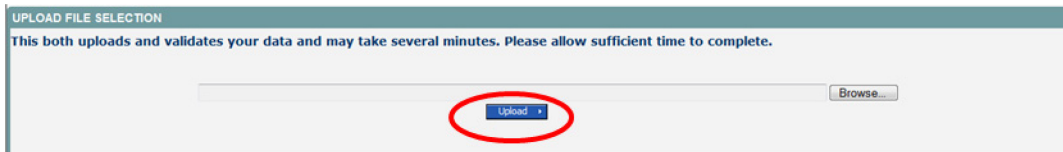
This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.

[]

[Upload]

Browse

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

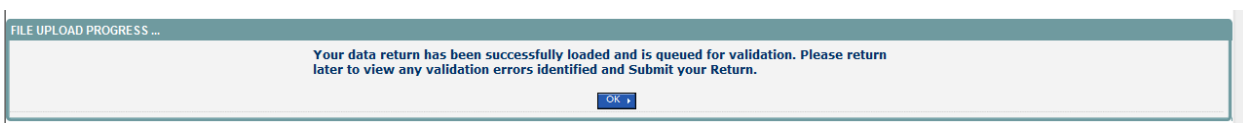


A progress message may be displayed while the upload is taking place.

Uploading School1.xml



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



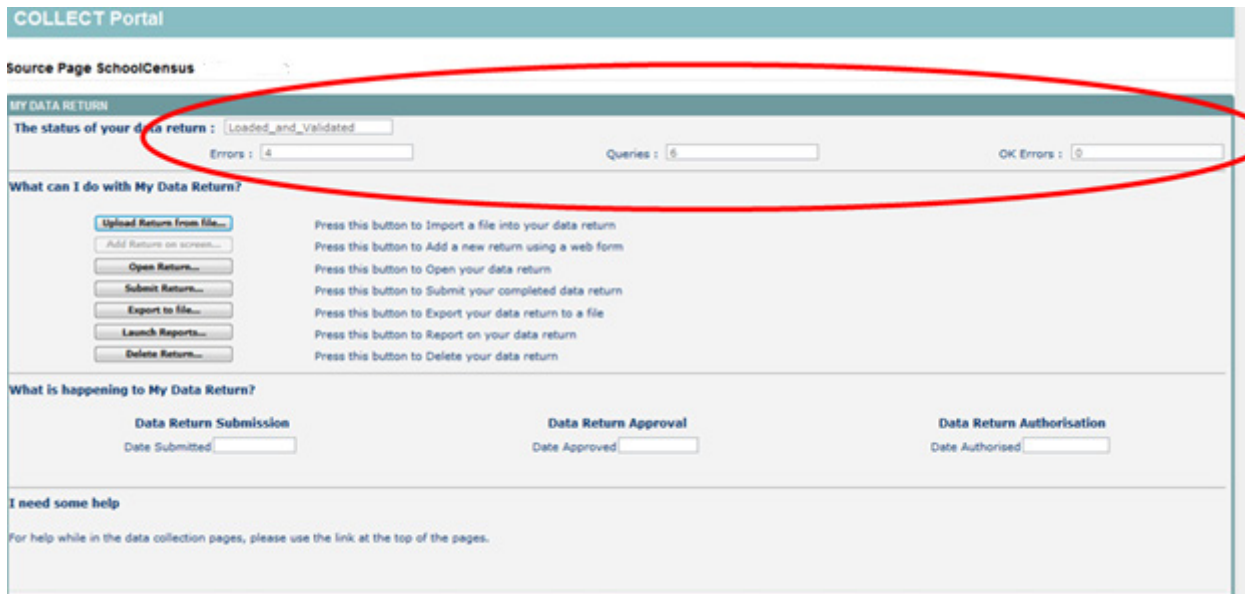
This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

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.

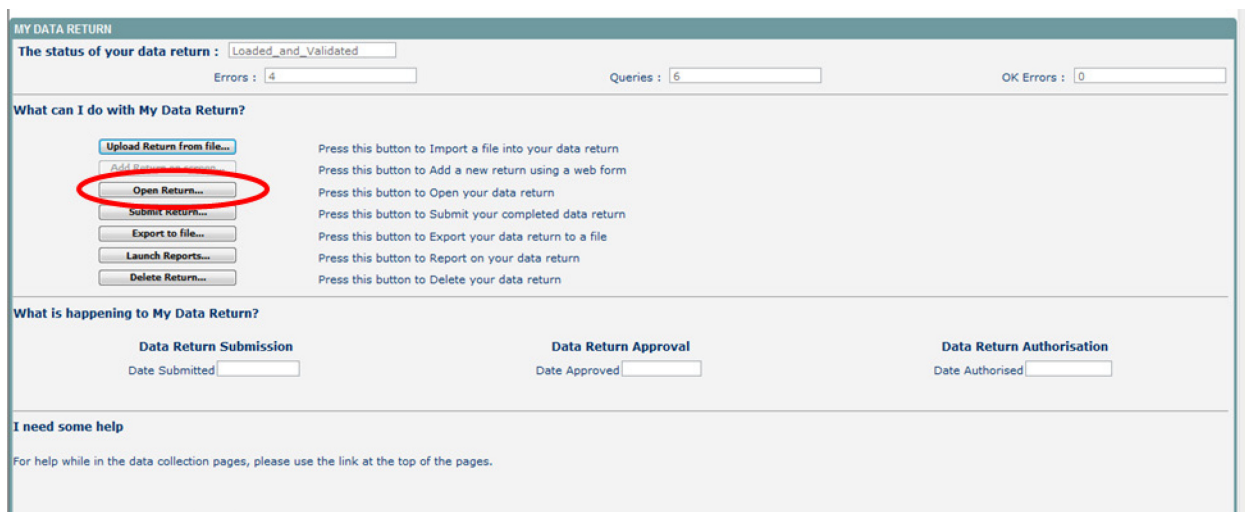
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred.

When 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.

Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		0	14	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Autumn 2016		0	0	0	
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-10-06	2	0	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Estab	1001	1	0	0	
Software Code	MadeUp	0	0	0	
Release		0	0	0	
Xversion		0	0	0	
Serial No	1	0	0	0	
Datetime	2016-01-01 00:00:00	0	0	0	

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' you will be taken into the pupil section. This displays the 'records list', with all 'pupils on roll' visible. You can use the filter bar to identify a particular pupil, or click on the headers to sort alphabetically.

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

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		
		0	14	0	
Data Item	Value	E	Q	OK Errors	History
School Census Autumn 2016					
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-10-06	2	0	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Estab	1001	1	0	0	
Software Code	MadeUp	0	0	0	
Release		0	0	0	
Xversion		0	0	0	
Serial No	1	0	0	0	
Datetime	2016-01-01 00:00:00	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

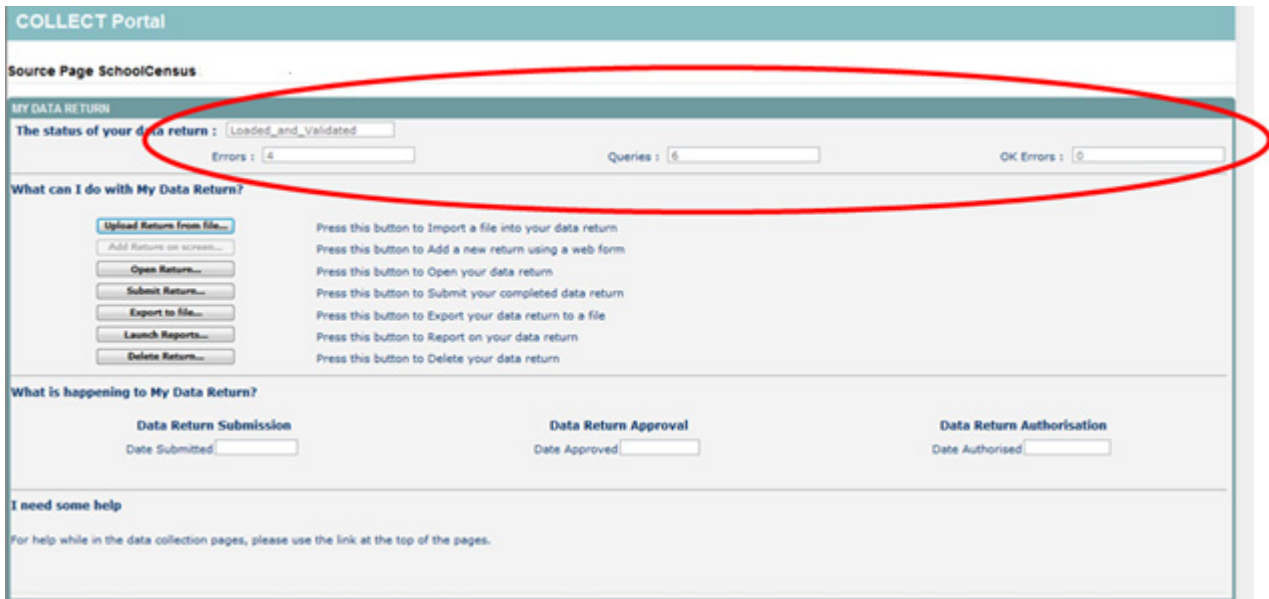
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

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.

	Errors		OK Errors	Return Level Notes
	E	Q		
Return Level Errors	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_Autumn						
SA Test School 1		Error report on 22/08/2016 at 16:29			Count 38	Return
Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Details
		Invalid Code Value	Errors	Details		X
130		D/E number and phase are not consistent	Errors	Details		X
150		School Type and Phase not consistent	Errors	Details		X
2290		Exclusion Start Date invalid	Errors	Details		X
2330		Where Exclusion Category is Permanent the number of Sessions is not applicable	Errors	Details		X
2330		Where Exclusion Category is Permanent the number of Sessions is not applicable	Errors	Details		X
2335		Permanent Exclusion appears for pupil still on roll	Errors	Details		X
2335		Permanent Exclusion appears for pupil still on roll	Errors	Details		X
5048		Pupil's type of class can only be returned from schools with a phase of PS or AT and may be present only for pupils in NC Year N1, N2, R, or 1-7	Errors	Details		X
5048		Pupil's type of class can only be returned from schools with a phase of PS or AT and may be present only for pupils in NC Year N1, N2, R, or 1-7	Errors	Details		X

Correcting errors

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

Either:

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

Providing clarification/ supplementary information

Where validation queries are raised in COLLECT, an explanation will be required for these queries in the return level notes field within COLLECT. The department will require **sufficient detail** in these explanations to allow the queries to be accepted, and returns authorised. Therefore your local authority will be contacted by the helpdesk for further information should your notepad entries not contain the required detail.

A guide detailing what is regarded as an acceptable notepad entry for queries on the census is available on the [school census website](#).

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

SC16 Autumn - SA Test School 1

All notes must be added in the "Return Level Notes" section

Return Level Errors	Errors		OK Errors	Return Level Notes
	E	Q		
	0	14	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Autumn 2016					
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-10-05	2	0	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Estab	1001	1	0	0	
Software Code	MadeUp	0	0	0	
Release		0	0	0	
Xversion		0	0	0	
Serial No	1	0	0	0	
Datetime	2016-01-01 00:00:00	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

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.

COLLECT Portal

Note Page

Create New Note

Type note and error number in here

Create Cancel

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

You can enter one note to cover numerous queries.

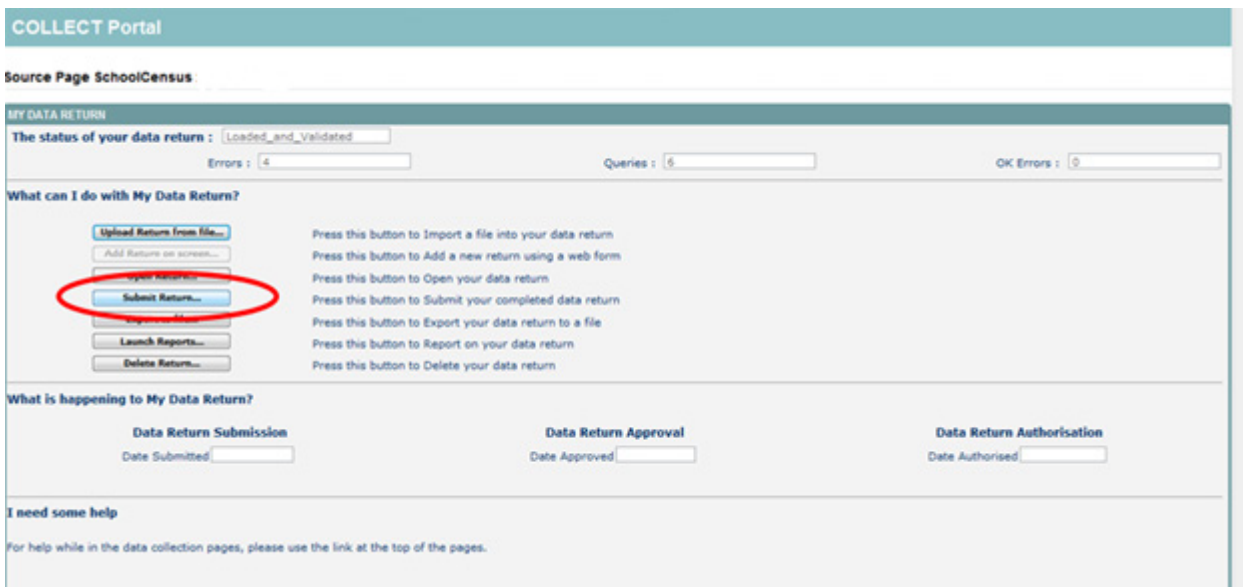
For example – 3 x 2020Q – confirmed correct, 1 x 1780Q – confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in the summer term.

Submitting the return

The school is responsible for 'submitting' the return once the data has been checked and any explanatory notes have been added. By submitting the return the school have indicated that the head teacher has checked the return for accuracy and completeness and therefore the return can be used by the local authority. When the local authority are satisfied with your return they will approve it thus allowing 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

COLLECT Portal

Source Page SchoolCensus

MY DATA RETURN

The status of your data return is: **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 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

What is happening to My Data Return?

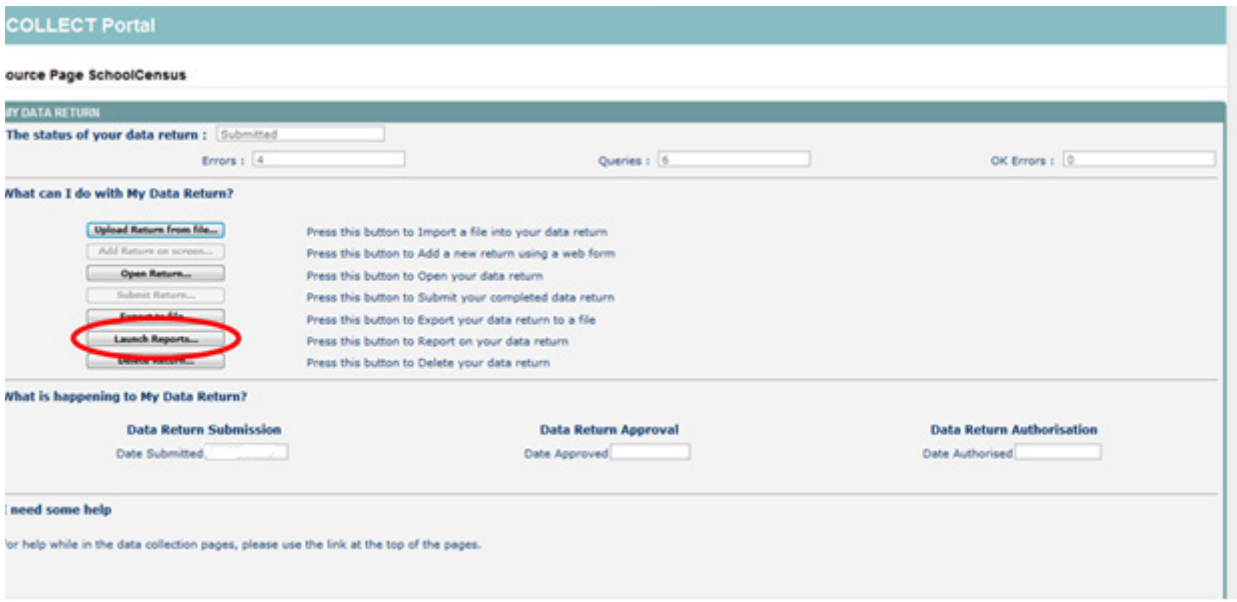
Data Return Submission Date Submitted: <input type="text"/>	Data Return Approval Date Approved: <input type="text"/>	Data Return Authorisation Date Authorised: <input type="text"/>
---	--	---

I need some help

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

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. 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.

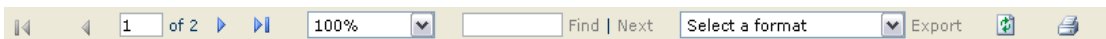
The local authority also has access to your reports and therefore should liaise with the school to resolve any anomalies.

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

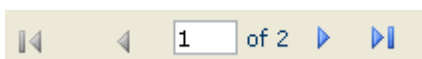
[School census website](#)

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

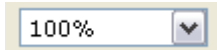
Along the top of the report you will see a toolbar with various functions.



These are explained as follows:



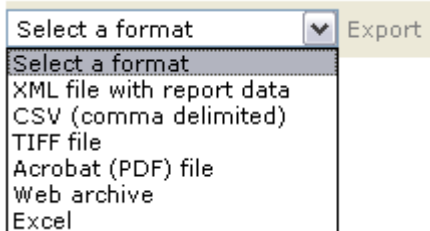
Allows you to navigate between pages of the report.



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.

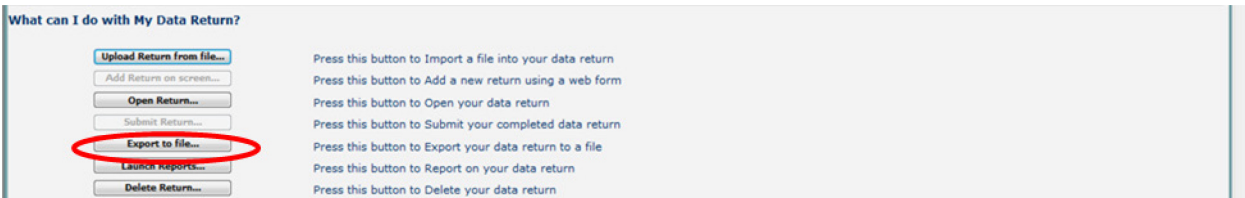
Exporting a return

A return can be exported in XML or CSV format.

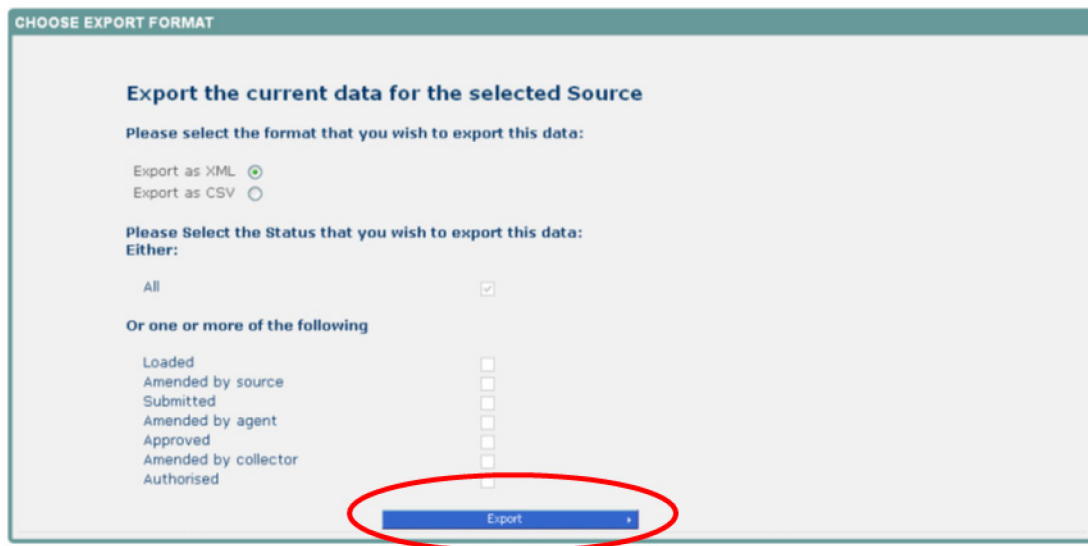
Exporting a return (current state)

On the source page

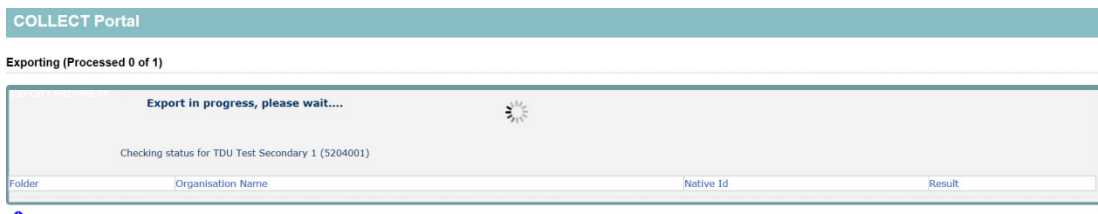
- 1) Click on export to file.



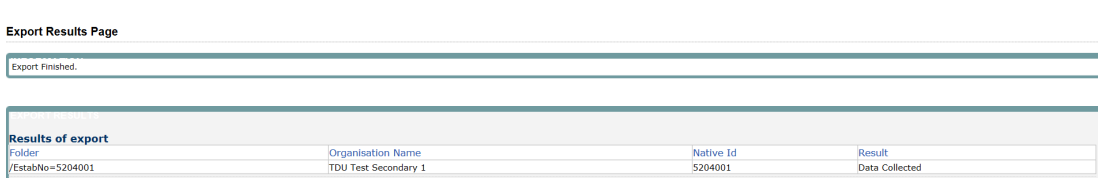
- 2) Choose to export in either XML or CSV format, then click on the export button.



- 3) A progress message will be displayed.



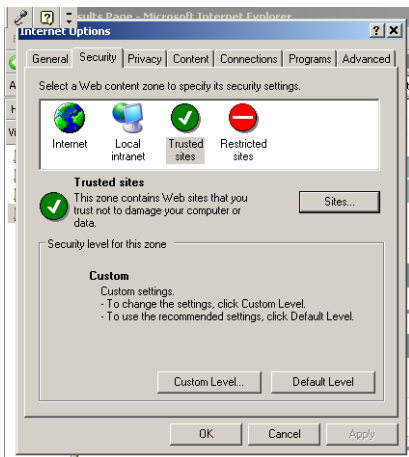
When completed the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



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'

Then 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 then ok again. 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.



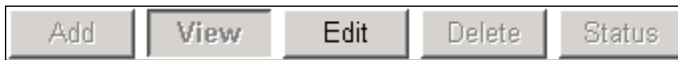
Navigation controls

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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