



Department  
for Education

# School Census 2014

**COLLECT guide – academies, free schools, studio schools, UTCs and NMSS.**

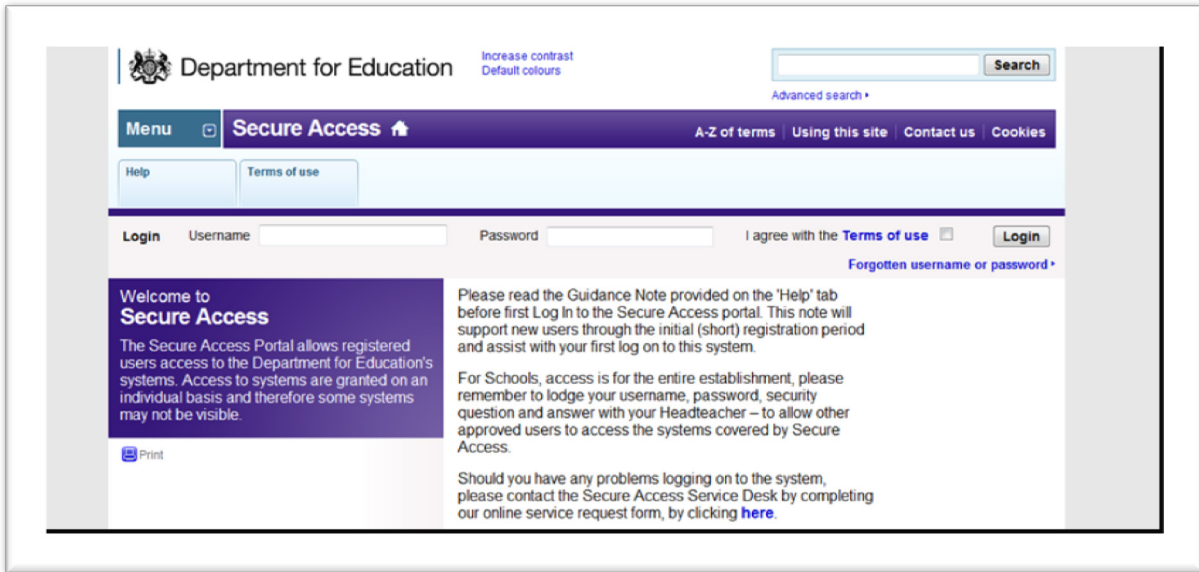
**January 2014**

# Contents

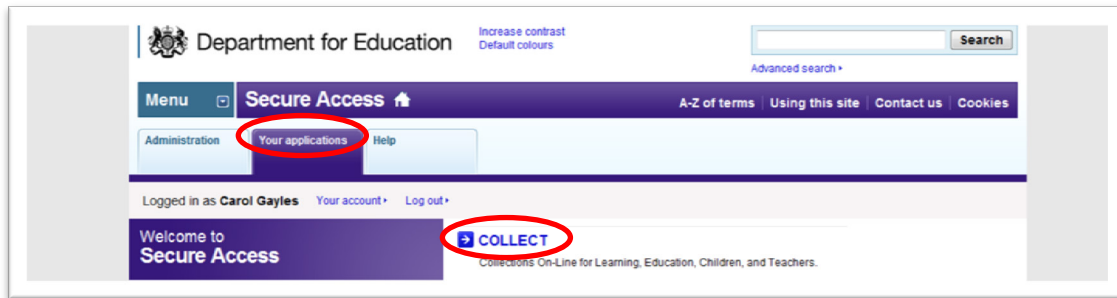
COLLECT and Secure Access	3
Source	5
Loading a Return	6
Viewing the Return Details	8
New: Editing Data within the Return	9
Errors	10
Total Return Errors	10
Return Level Errors	10
To view all errors and queries on the return	11
Correcting Errors	11
Providing Clarification/ Supplementary Information	12
Submitting the Return	14
Reports	15
Exporting a return	17
Screen Functionality	19
Screen Navigation	19
Navigation controls	19
Mode Buttons	20
Help	21

# COLLECT and Secure Access

Access to COLLECT is through the Department's Secure Access System (SA)



Full Secure Access guides are published on the [Secure Access Website](#).

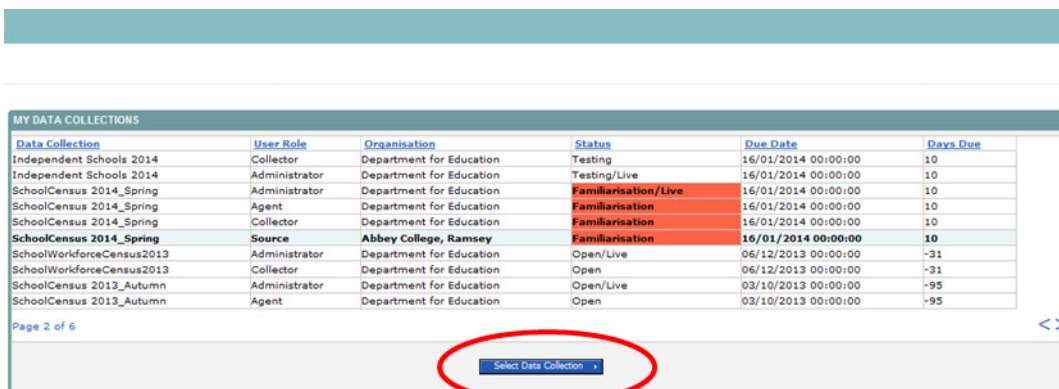


Once successfully registered, open the 'Your applications' tab to access COLLECT, as above.

Then click on to 'Continue' to enter COLLECT as below.



**\*Please note: some screen shots refer to 2013 however the process is the same for all 2014 census collections.\***



Data Collection	User Role	Organisation	Status	Due Date	Days Due
Independent Schools 2014	Collector	Department for Education	Testing	16/01/2014 00:00:00	10
Independent Schools 2014	Administrator	Department for Education	Testing/Live	16/01/2014 00:00:00	10
SchoolCensus 2014_Spring	Administrator	Department for Education	Familiarisation/Live	16/01/2014 00:00:00	10
SchoolCensus 2014_Spring	Agent	Department for Education	Familiarisation	16/01/2014 00:00:00	10
SchoolCensus 2014_Spring	Collector	Department for Education	Familiarisation	16/01/2014 00:00:00	10
SchoolCensus 2014_Spring	Source	Abbey College, Ramsey	Familiarisation	16/01/2014 00:00:00	10
SchoolWorkforceCensus2013	Administrator	Department for Education	Open/Live	06/12/2013 00:00:00	-31
SchoolWorkforceCensus2013	Collector	Department for Education	Open	06/12/2013 00:00:00	-31
SchoolCensus 2013_Autumn	Administrator	Department for Education	Open/Live	03/10/2013 00:00:00	-95
SchoolCensus 2013_Autumn	Agent	Department for Education	Open	03/10/2013 00:00:00	-95

Page 2 of 6

Select Data Collection

Select the collection you wish to open 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?**

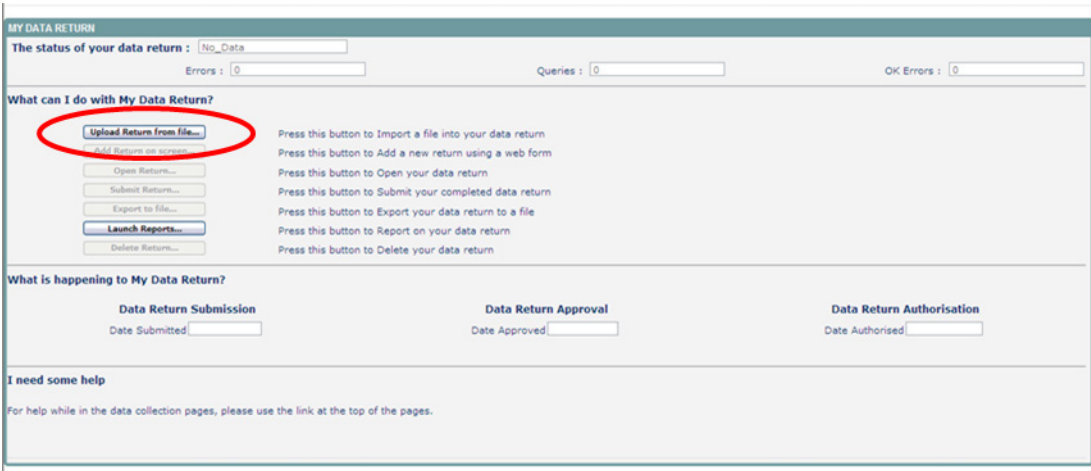
<b>Data Return Submission</b>	<b>Data Return Approval</b>	<b>Data Return Authorisation</b>
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

**I need some help**

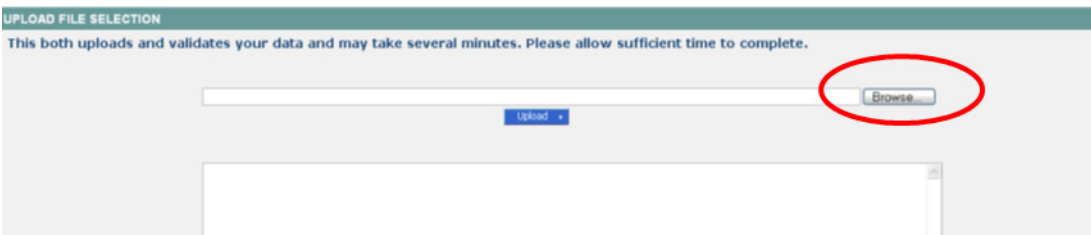
For help while in the data collection pages, please use the link at the top of the pages.

# Loading a Return

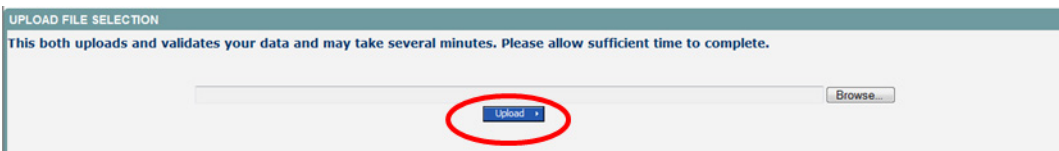
1) Click on **Upload return from file**



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



3) Click on the **Upload** button to load the return.

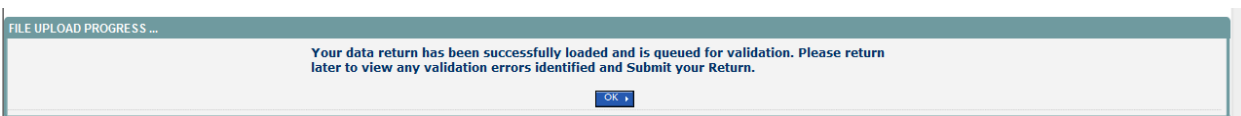


A progress message may be displayed while the upload is taking place.

Uploading School1.xml



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



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

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

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

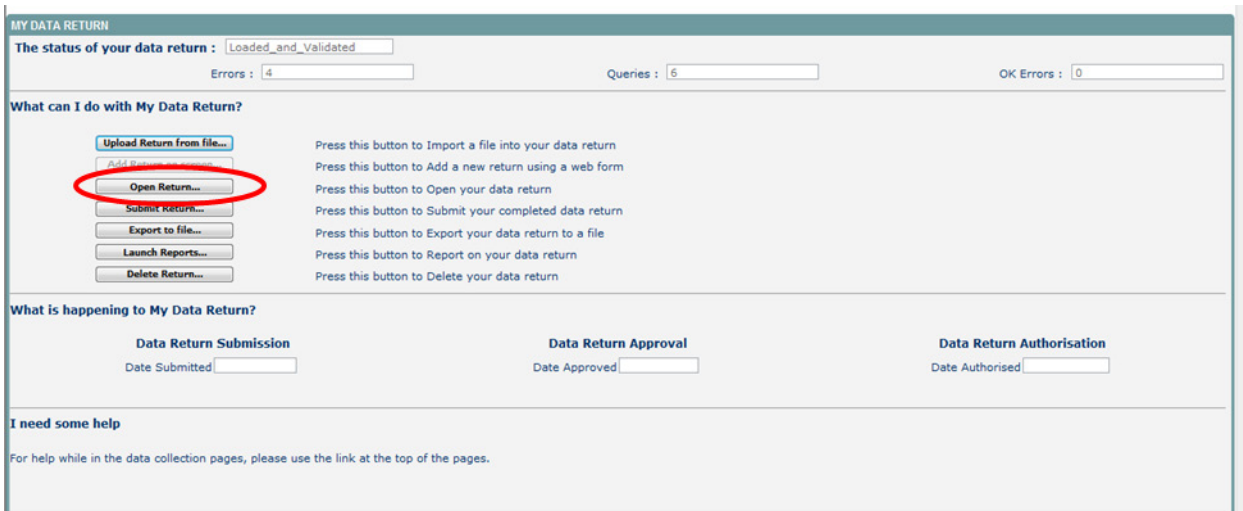
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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

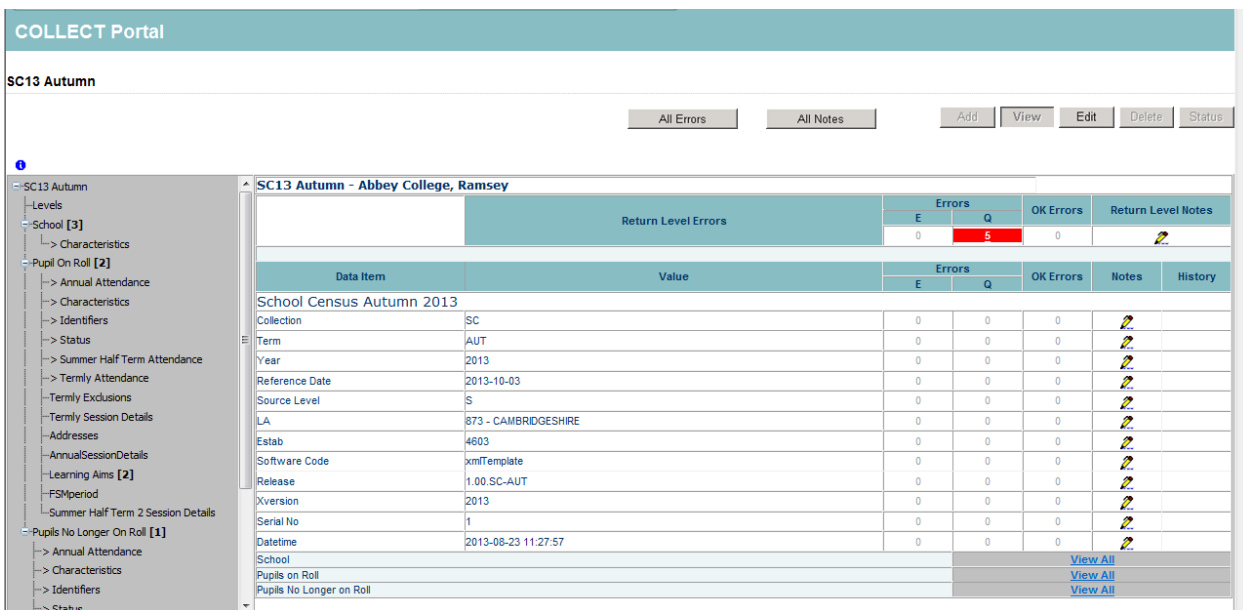
The screenshot shows the 'COLLECT Portal' interface. The main heading is 'Source Page SchoolCensus 2013\_Autumn'. Below this is the 'MY DATA RETURN' section. A red oval highlights the status information: 'The status of your data return : Loaded\_and\_Validated', 'Errors : 4', 'Queries : 6', and 'OK Errors : 0'. Below this, there is a section titled 'What can I do with My Data Return?' with several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...'. Each button has a corresponding description. Below this is a section titled 'What is happening to My Data Return?' with three sub-sections: 'Data Return Submission' (Date Submitted: [ ]), 'Data Return Approval' (Date Approved: [ ]), and 'Data Return Authorisation' (Date Authorised: [ ]). At the bottom, there is a section titled 'I need some help' with a link to help pages.

# Viewing the Return Details

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



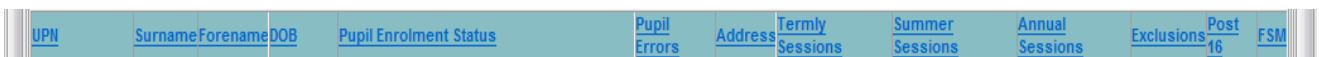
Your return will then be displayed



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.

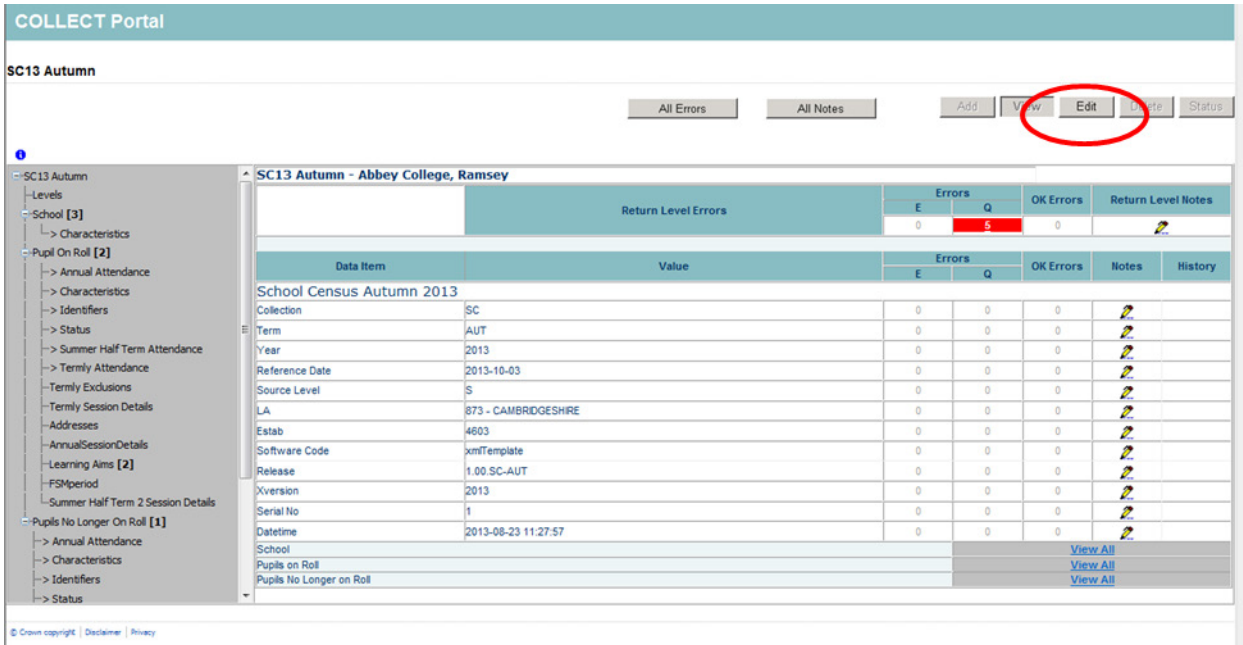




# New: Editing Data within the Return

The default view when a screen is displayed is 'View' mode. We have enabled editing at school level for School Census\_Autumn 2013.

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



The screenshot shows the COLLECT Portal interface for 'SC13 Autumn' at 'Abbey College, Ramsey'. The 'Edit' button in the top navigation bar is circled in red. The main content area displays a table for 'School Census Autumn 2013' with columns for 'Data Item', 'Value', 'Errors' (E, Q), 'OK Errors', 'Notes', and 'History'. The 'Errors' column for 'Q' is highlighted in red with the value '5'. A sidebar on the left shows a tree view of the data structure.

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

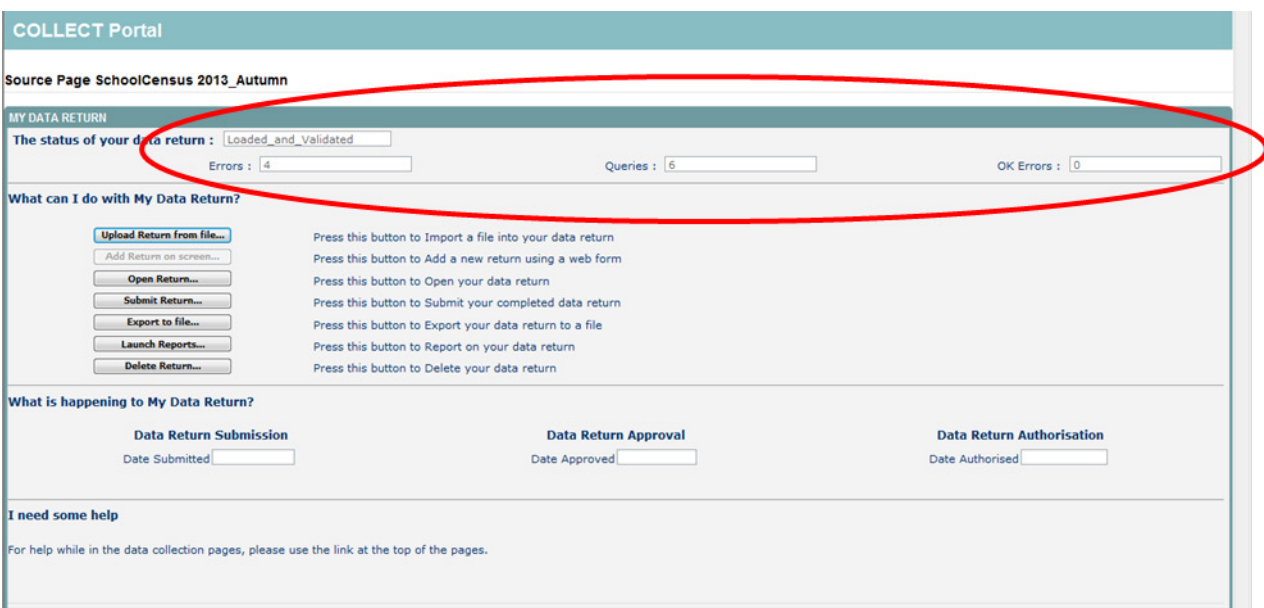
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger Errors or Queries.

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	

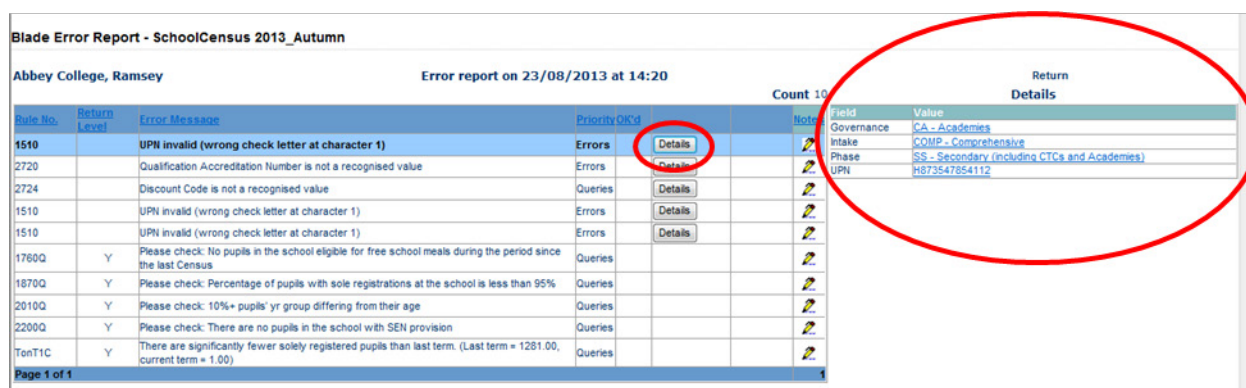
The table shows a summary of return level errors. The 'Return Level Errors' section is highlighted in teal. The table has columns for 'Errors' (subdivided into 'E' and 'Q'), 'OK Errors', and 'Return Level Notes'. The 'Q' value is highlighted in red, indicating 6 queries. A pencil icon is present in the 'Return Level Notes' column.

## 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.



The screenshot displays the 'Blade Error Report - SchoolCensus 2013\_Autumn' for 'Abbey College, Ramsey'. The main table lists errors and queries with columns for Rule No., Return Level, Error Message, Priority (OK'd), and Count. The 'Details' button for the first error (Rule No. 1510) is circled in red. To the right, the 'Return Details' section is also circled in red, showing fields like Governance, Intake, Phase, and UPN with their corresponding values.

Rule No.	Return Level	Error Message	Priority (OK'd)	Count	Notes
1510		UPN invalid (wrong check letter at character 1)	Errors		
2720		Qualification Accreditation Number is not a recognised value	Errors		
2724		Discount Code is not a recognised value	Queries		
1510		UPN invalid (wrong check letter at character 1)	Errors		
1510		UPN invalid (wrong check letter at character 1)	Errors		
1760Q	Y	Please check: No pupils in the school eligible for free school meals during the period since the last Census	Queries		
1870Q	Y	Please check: Percentage of pupils with sole registrations at the school is less than 95%	Queries		
2010Q	Y	Please check: 10%+ pupils' yr group differing from their age	Queries		
2200Q	Y	Please check: There are no pupils in the school with SEN provision	Queries		
TonT1C	Y	There are significantly fewer solely registered pupils than last term. (Last term = 1281.00, current term = 1.00)	Queries		

Field	Value
Governance	CA - Academies
Intake	COMP - Comprehensive
Phase	SS - Secondary (including CTCs and Academies)
UPN	H873547854112

## 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) Change the mode of the form to 'Edit' and then click on the data item that needs to be changed and update it – ensuring the you reflect this change in the MIS

# Providing Clarification/ Supplementary Information

In some instances you will be requested to provide explanatory information (as part of email communications you will receive a document which will provide guidance on what notepad explanation would be expected for individual queries. This will also be made available on our web page [School Census 2013](#) ) 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 you for further information.

There are several levels where you can add Notes, return level, field level, Error level and in 'All Errors' against the query.

**Where possible DfE would recommend entering all notes at return level as this will avoid notes being lost in the event of a resubmission as unlike other notepad entries, the Return Level notes are not overwritten if a resubmission is made.**

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

The screenshot shows the 'SC13 Autumn - Abbey College, Ramsey' interface. The 'Return Level Errors' section is active, displaying a table with columns for 'Data Item', 'Value', 'Errors' (E, Q), 'OK Errors', 'Notes', and 'History'. A red circle highlights the 'Return Level Notes' tab and a pen icon in the 'Notes' column of the 'Collection' row.

Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	SC	0	0	0		
Term	AUT	0	0	0		
Year	2013	0	0	0		
Reference Date	2013-10-03	0	0	0		
Source Level	S	0	0	0		
LA	873 - CAMBRIDGESHIRE	0	0	0		
Estab	4803	0	0	0		
Software Code	xmlTemplate	0	0	0		
Release	1.00.SC-AUT	0	0	0		
Xversion	2013	0	0	0		
Serial No	1	0	0	0		
Datetime	2013-08-23 11:27:57	0	0	0		
School					<a href="#">View All</a>	
Pupils on Roll					<a href="#">View All</a>	
Pupils No Longer on Roll					<a href="#">View All</a>	

- 2) Click add new note

The screenshot shows the 'Note Detail' form. A red circle highlights the 'Add New Note' button. Below the form is a table for 'Preserved notes deleted by resubmissions' with columns for 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. There is also a 'Remove Preserved Note' button.

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



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

**You can enter one note to cover numerous queries.**

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

# Submitting the Return

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

To 'Submit' your return:

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

COLLECT Portal

Source Page SchoolCensus 2013\_Autumn

MY DATA RETURN

The status of your data return :

Errors :       Queries :       OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

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

I need some help

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

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 2013\_Autumn

MY DATA RETURN

The status of your data return :

Errors :       Queries :       OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

<b>Data Return Submission</b> Date Submitted: <input type="text" value="23/08/2013"/>	<b>Data Return Approval</b> Date Approved: <input type="text"/>	<b>Data Return Authorisation</b> 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.

COLLECT Portal

Source Page SchoolCensus 2013\_Autumn

MY DATA RETURN

The status of your data return : Submitted

Errors : 4      Queries : 6      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
<b>Launch Reports...</b>	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?

<b>Data Return Submission</b> Date Submitted: 23/08/2013	<b>Data Return Approval</b> Date Approved: [ ]	<b>Data Return Authorisation</b> Date Authorised: [ ]
---	---	--

I need some help

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

- 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 these reports especially the Duplicate Reports.**

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.

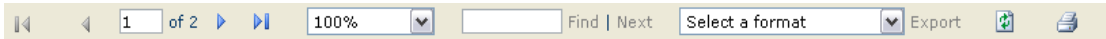
**In Spring and Autumn School Census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your school as each pupil is funded only once.**

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

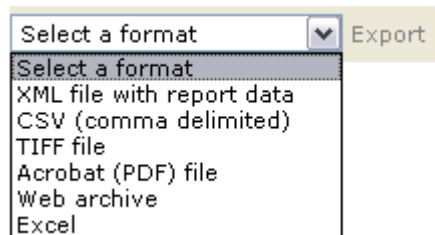
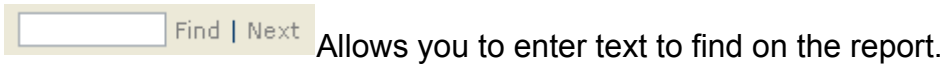
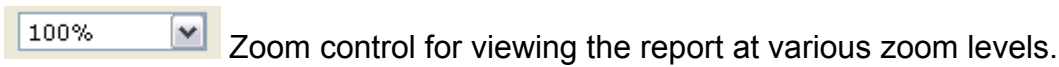
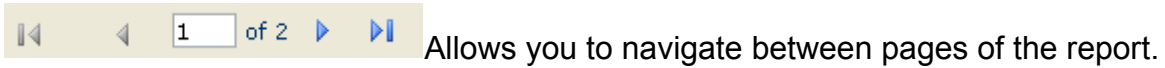
## [School Census 2013](#)

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

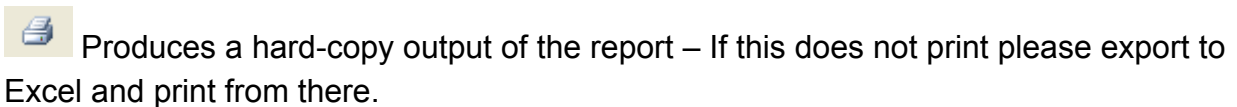
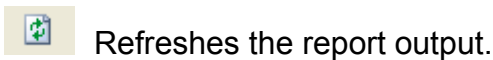
Along the top of the report you will see a toolbar with various functions.



These are explained as follows.



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.





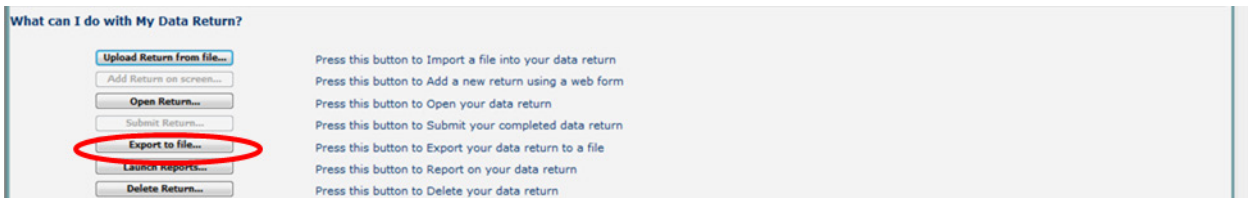
# Exporting a return

A return can be exported in xml or csv format

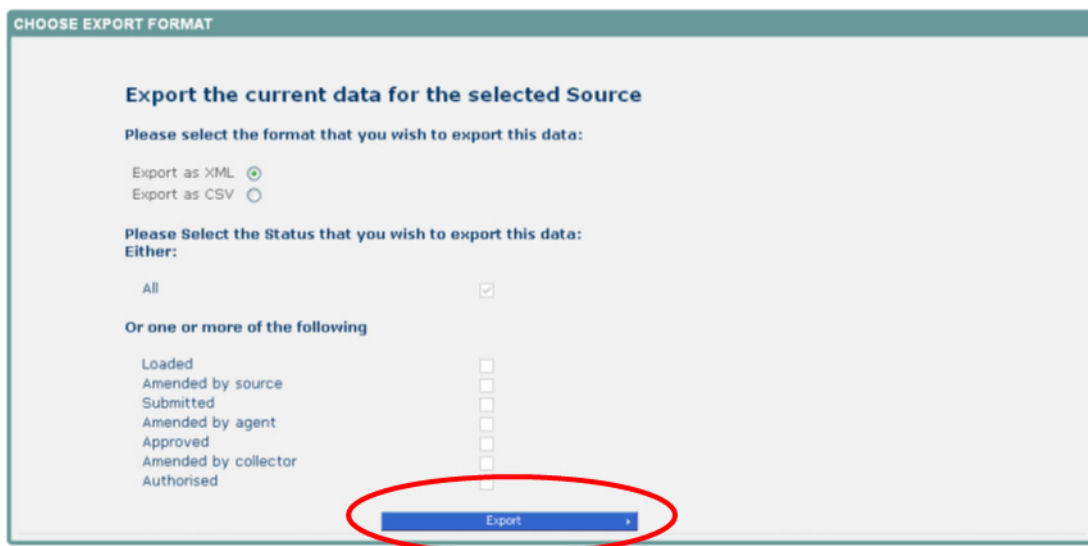
## Exporting a return (Current state)

On the **Source** page

- 1) Click on Export to file

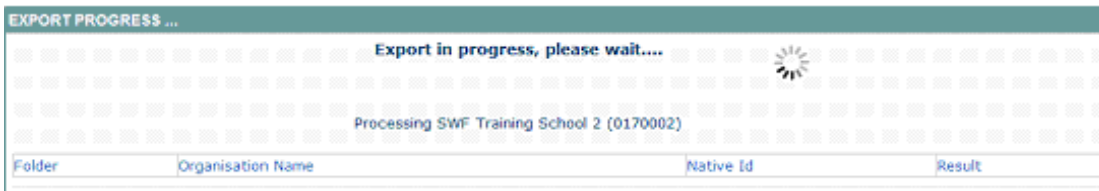


- 2) Choose to export in either XML or CSV format, then click on the **Export** button.

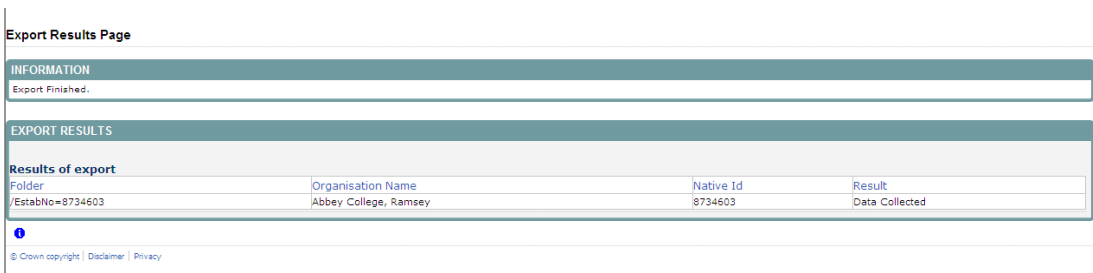


- 3) A progress message will be displayed

Exporting (Processed 0 of 1)



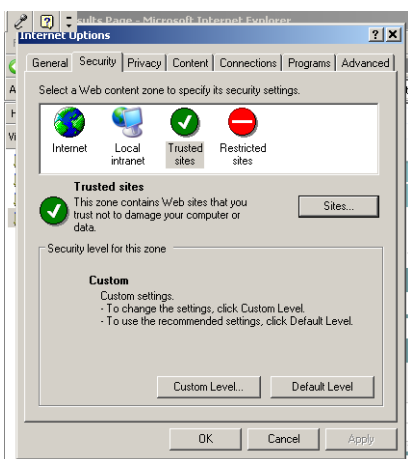
- 4) When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



**Important Note:** If the export process fails, with a message stating that Internet Explorer has blocked download of a file, you might succeed if you try again. On the second attempt, hold down the **Ctrl** key down continuously from before you click on **Export** until after you see the resulting files displayed in Windows Explorer. If this is still not successful, you will have to adjust the security settings on your internet browser.

## Adjusting Security Settings

The security settings on your pc may prevent the '**File Download**' appearing. If this is the case then go into the '**Tools**' menu option at the top of the screen.



Select '**Internet Options**' from the drop down menu.

Select '**Security**' from the option buttons

Selected '**Trusted Sites**'

Select '**Sites**'

The select '**Add**' and type the following into the text box in turn:

<https://collectdata.education.gov.uk/CollectPortalLive/MainPage.aspx>

<https://sa.education.gov.uk/idp/Authn/UserPassword>

Then select ok and ok. Then try producing the export again and this time the Open/Save/Cancel dialog 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.



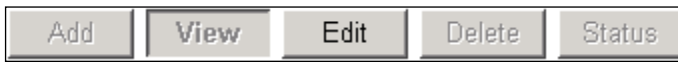
### Navigation controls

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 or have a change to your contact details please could you complete a [Service Request form](#).



Department  
for Education

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