



Department  
for Education

# **School capacity (SCAP) 2014**

## **COLLECT Guide**

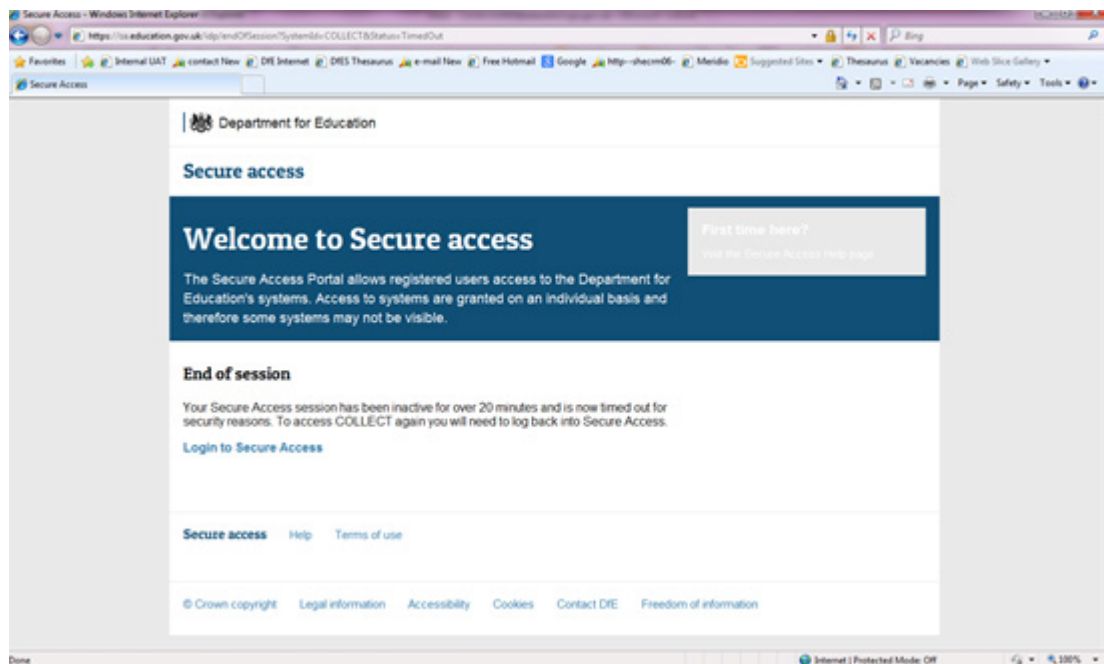
**May 2014**

# Contents

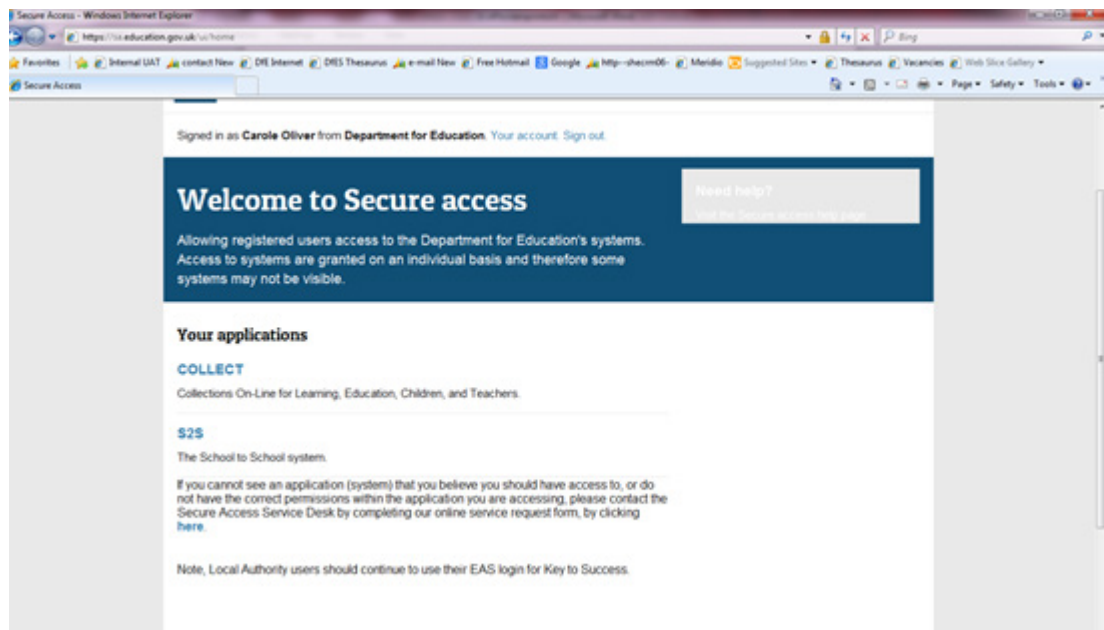
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# COLLECT and secure access

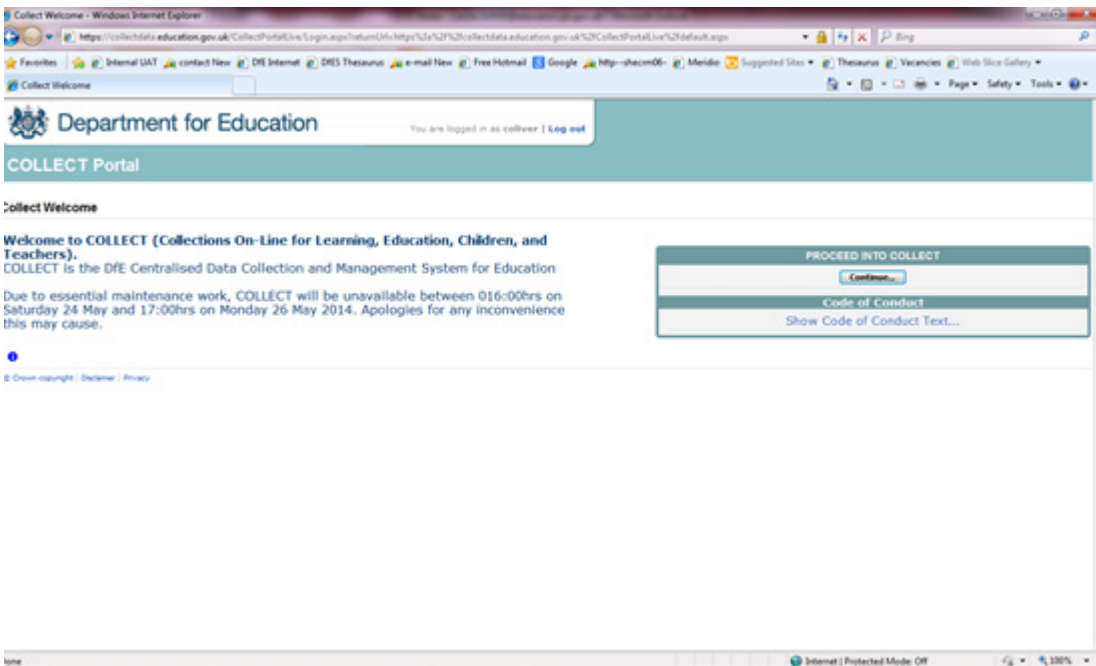
Access to COLLECT is now through the Department's Secure Access system.



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



Once successfully registered click on to **Home** and then click onto **COLLECT** 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.

MY DATA COLLECTIONS					
Data Collection	User Role	Organisation	Status	Due Date	Days Due
<b>SCAP - Capacity 2013</b>	<b>Source</b>	<b>Bromley</b>	<b>Testing</b>	<b>25/06/2012 00:00:00</b>	<b>-361</b>
SCAP - Capacity 2013	Collector	Department for Education	Testing	25/06/2012 00:00:00	-361
SCAP - Forecasts 2012	Collector	Department for Education	Testing	25/06/2012 00:00:00	-361
SCAP - Forecasts 2012	Administrator	Department for Education	Testing/Live	25/06/2012 00:00:00	-361
SCAP - Forecasts 2013	Administrator	Department for Education	Testing/Live	25/06/2012 00:00:00	-361
SCAP - Forecasts 2013	Source	Bromley	Testing	25/06/2012 00:00:00	-361
SCAP - Forecasts 2013	Collector	Department for Education	Testing	25/06/2012 00:00:00	-361
School Closure September 2012	Administrator	Department for Education	Testing/Live	29/03/2012 00:00:00	-449
SchoolCensus 2013_Summer	Agent	Department for Education	Open	16/05/2013 00:00:00	-36
SchoolWorkforceCensus2011	Collector	Department for Education	Testing	11/12/2011 00:00:00	-558

Page 2 of 3

**Select Data Collection**

The Source main screen will be displayed

Department for Education  
COLLECT Portal  
Source Page SCAP - Capacity 2012

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

What can I do with My Data Return?

<b>Upload Return from file...</b>	Press this button to Import a file into your data return
<b>Add Return on screen...</b>	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: <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 is divided into three main sections:

- Return status;
- Return management;
- Return progress.

## Return status

This shows the current status of the return and a breakdown of the errors within it. All information is read only.

The status of your data return :   
Errors :  Queries :  OK Errors :

## Return management

This provides a set of functions that can be used to manage/progress the return. Those with bold text and highlighted borders are available.

What can I do with My Data Return?

<b>Upload Return from file...</b>	Press this button to Import a file into your data return
<b>Add Return on screen...</b>	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

## Return progress

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

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>
<input type="button" value="View submitted data return..."/>	<input type="button" value="View approved data return..."/>	<input type="button" value="View authorised data return..."/>
<input type="button" value="Export submitted data return..."/>	<input type="button" value="Export approved data return..."/>	<input type="button" value="Export authorised data return..."/>

# Adding a return on screen

In order to view your pre-populated data you need to click on 'Add Return on screen'.

Source Page SCAP - Capacity 2012

**MY DATA RETURN**

The status of your data return :

Errors :       Queries :       OK Errors :

**What can I do with My Data Return?**

<b>Upload Return from file...</b>	Press this button to Import a file into your data return
<b>Add Return on screen...</b>	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?**

<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.

The following screen will be displayed; please click on the 'Save' button, to start your return.

COLLECT Portal

SchoolCapacity

Add new record ?      **Save**      Cancel

SchoolCapacity - Durham		Errors		OK Errors	Return Level Notes
Return Level Errors		E	Q		
		0	0	0	

School Capacity - Capacity		Errors		OK Errors	Notes	History
Data Item	Value	E	Q			
Collection	School Capacity	0	0	0		
DateTime	2012-06-08 11:00:12	0	0	0		
Year	2012	0	0	0		
LEA Number	340	0	0	0		

Capacity and Published Admission Numbers - all schools	View All
Capacity and Published Admission Numbers - new schools	View All
Commentary for LAs with pupil place planning pressures	View

To view your data, please click on the 'View All' buttons.

COLLECT Portal

SchoolCapacity

- SchoolCapacity

- > Commentary
- School [269]
  - > Individual School Data
  - NewSchool

SchoolCapacity - Durham						
	Return Level Errors	Errors		OK Errors	Return Level Notes	
		E	Q			
		0	0	0		

School Capacity - Capacity						
Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	School Capacity	0	0	0		
DateTime	2012-06-08 11:00:12	0	0	0		
Year	2012	0	0	0		
LEA Number	840	0	0	0		

Capacity and Published Admission Numbers - all schools				<a href="#">View All</a>		
Capacity and Published Admission Numbers - new schools				<a href="#">View All</a>		
Commentary for LAs with pupil place planning pressures				<a href="#">View</a>		



# Updating net capacity and published admission numbers (PANs)

Once you have entered into the Individual School Data Screen, you should then check all data and update where necessary. To select a school in order to view the data and update the record click on the school name, this will highlight the selected school in **BLUE** then, click the **'Edit'** button.

Your highlighted schools record will then be displayed in a box at the bottom of the page as seen below. Enter the new figure into the box and click elsewhere on the screen to save the change. You can update as many records as needed without having to press the edit button each time. To return to the previous page, press the **'Drill Up'** button.

**COLLECT Portal**  
**School - Individual School Data**

**School - Individual School Data - Durham**

Estab	School Name	Capacity as at May 2012	Number on roll As At Jan 2012	Number on roll As At May 2012	NOR in excess of Capacity	School Closed	Capacity Changed	Sc	Ty
9999	Name of School	Your Individual school data will be displayed here							

**Net Capacity**

INDIVIDUAL SCHOOL DATA

Data Item	Data Item Value	Errors		OK Errors	Notes	H
		E	Q			
Estab Errors		0	0	0		
Capacity (as at May 2012)	240	0	0	0		
PAN Year Reception (As at Sept 2011)		1	0	0		
PAN Year 1 (As at Sept 2011)		1	0	0		
PAN Year 2 (As at Sept 2011)		1	0	0		
PAN Year 3 (As at Sept 2011)		1	0	0		
PAN Year 4 (As at Sept 2011)		1	0	0		
PAN Year 5 (As at Sept 2011)		1	0	0		
PAN Year 6 (As at Sept 2011)		1	0	0		
PAN Year 7 (As at Sept 2011)		1	0	0		
PAN Year 8 (As at Sept 2011)		1	0	0		
PAN Year 9 (As at Sept 2011)		1	0	0		
PAN Year 10 (As at Sept 2011)		1	0	0		
PAN Year 11 (As at Sept 2011)		1	0	0		
School Closed	True	0	0	0		

# Adding a New School

If there are any schools missing from the Individual School Data screen you can add them in using the New Schools section of COLLECT

Please click on the **'View All'** link to go through into the New School section.

COLLECT Portal

SchoolCapacity

All Errors All Notes Add View Edit Delete

SchoolCapacity - Durham

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

School Capacity - Capacity

Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	School Capacity	0	0	0		
DateTime	2012-06-08 11:00:12	0	0	0		
Year	2012	0	0	0		
LEA Number	840	0	0	0		

Capacity and Published Admission Numbers - all schools [View All](#)

Capacity and Published Admission Numbers - new schools [View All](#)

Commentary for LAs with pupil place planning pressures [View](#)

Please click on the **Add** button at the top of the screen.

COLLECT Portal

NewSchool

INFORMATION

No matching NewSchool records found

All Errors All Notes **Add** View Edit Delete Status

NewSchool - Bromley

Drill Up Error

All Notes

Estab School Name Governance Capacity as at May 2013 NOR NOR in Excess of Capacity Urban/Rural Indicator District Code Planning Area Code

New School

Date Item	Data Value	Errors		OK Errors	Notes	History
		E	Q			
Estab		0	0	0		
School Name		0	0	0		
Governance		0	0	0		
School Phase		0	0	0		
Total Capacity (as at May 2013)		0	0	0		
Primary Capacity		0	0	0		
Secondary Capacity		0	0	0		
Number of Year Groups		0	0	0		
Planning Area Code		0	0	0		
District Code		0	0	0		
Urban / Rural Indicator		0	0	0		
PAN Year Reception (As at Sept 2012)		0	0	0		
PAN Year 1 (As at Sept 2012)		0	0	0		
PAN Year 2 (As at Sept 2012)		0	0	0		
PAN Year 3 (As at Sept 2012)		0	0	0		

Please enter the data required for the school by writing in the boxes and using the drop down menus. Once you have completed the data click on the 'Save' button at the top of the screen.

**COLLECT Portal**

**NewSchool**

**INFORMATION**  
No matching NewSchool records found

Add new record ?      **Save**      Cancel

**NewSchool - Bromley**

Estab School Name Governance Capacity as at May 2013 NOR NOR in Excess of Capacity Urban/Rural Indicator District Code Planning Area Code

**New School**

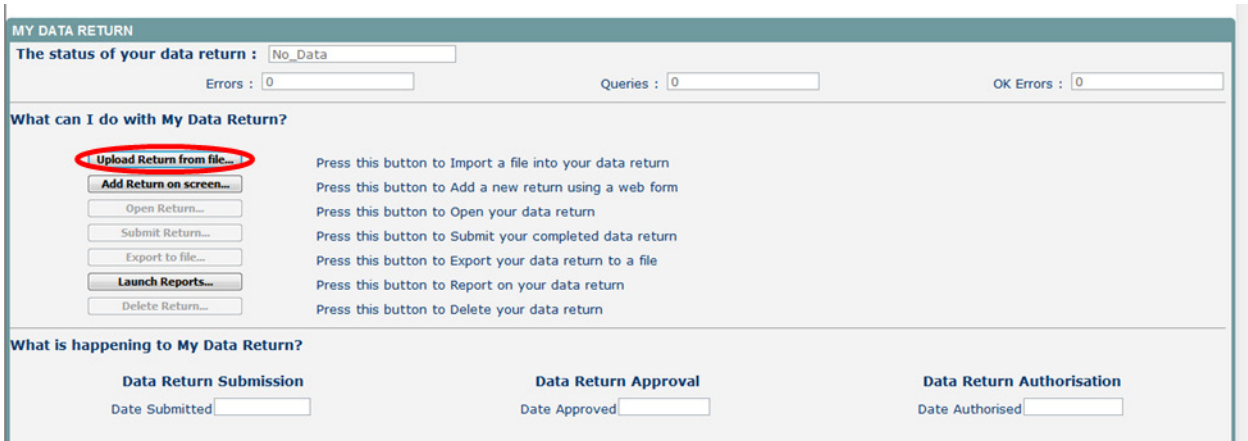
Date Item	Data Value	Errors		OK Errors	Notes	History
		E	Q			
Estab		0	0	0		
School Name		0	0	0		
Governance	CO - Community	0	0	0		
School Phase	PS - Primary	0	0	0		
Total Capacity (as at May 2013)		0	0	0		
Primary Capacity		0	0	0		
Secondary Capacity		0	0	0		
Number of Year Groups		0	0	0		
Planning Area Code		0	0	0		
District Code		0	0	0		
Urban / Rural Indicator		0	0	0		
PAN Year Reception (As at Sept 2012)		0	0	0		
PAN Year 1 (As at Sept 2012)		0	0	0		
PAN Year 2 (As at Sept 2012)		0	0	0		
PAN Year 3 (As at Sept 2012)		0	0	0		

# Uploading a XML file

Note: Any new schools that the collection does not expect will be automatically inserted into the new schools screen

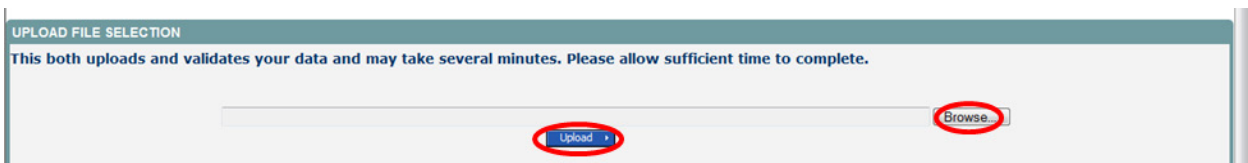
You can also upload a file into COLLECT to submit data to the department.

To upload your XML file, please select the **'Upload Return from File'** button from the Source main screen.



Use the browse button to locate the file on your computer. This will be suffixed with **.xml**

Highlight the file name and click on **Open** to select the return. Then click on the **'Upload'** button to load the return.



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

**COLLECT Portal**


**Uploading**

---

**FILE UPLOAD PROGRESS ...**

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

Loading raw return data



Once the upload has completed the source main page will be redisplayed and the return status section will have been updated to “Loaded\_and\_Validated” the total number of errors and queries found in the return will be displayed. Additional function buttons will now be available in the Return Management section.

**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

# Submitting your Return

You need to press the **'Submit Return'** button to release the data to the department.

In order to submit your return, you must first return to your source page by pressing the **'Back to My COLLECT'** at the top of the page next to help, you will then see the screen below. You will notice that there are various other buttons available, you just need to press 'Submit' and you will see the status of your return change to 'submitted'

**MY DATA RETURN**

The status of your data return : Loaded\_and\_Validated

Errors : 0      Queries : 0      OK Errors : 0

**What can I do with My Data Return?**

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

# Launching Reports

Please note any changes made to a return will not appear on the reports until the following day.

In order to gain a hard copy of your return, you can run a number of reports showing different aspects of the return. You must return to your source page to launch a report, you will see that the launch report button is still available after submitting your return.

**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

You can select one of the reports from the drop down box and click **'Launch Report'** then on the next screen **'Launch Report'** again to confirm.

## Report Launch

**REPORT SELECTOR**

Reports	Report Description
LA Academy School	LA Academy School Report
LA Academy School	
LA Primary School	
LA Secondary School	

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## COLLECT Portal

### Report Parameter Selection

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Your report will then be displayed. At this point you can export the report in to excel to save a copy, just select the format you wish to use from the drop down (please note that not all formats will produce the report in a readable format, the most useable format is excel) then click **export**.

LA Primary School Report

LA Primary School Report - This will display January figures until May figures

LA	Estab	School Name	NOR	As at Jan	As at May	N	C	District Code	PAN Reception as at Sept 2011	PAN Yr 1 as at Sept 2011	PAN Yr 2 as at Sept 2011	PAN Yr 3 as at Sept 2011
840	2001	Middlestone Moor Primary		207				00EJ				
840	2002	Chilton Primary School		277		350	N	Rural	00EJ			
840	2003	North Park Primary School		178		210	N	Urban	00EJ			
840	2004	Seascape Primary		253		385	N	Urban	00EJ			
840	2005	Pelton Community Primary Sch		293		357	N	Urban	00EJ			
840	2006	New Seaham Primary		267		266	N	Urban	00EJ			



# Extra Functions of COLLECT

You can use 'View All' buttons in order to navigate through the return.

COLLECT Portal

SchoolCapacity

All Errors All Notes Add View Edit Delete Status

SchoolCapacity - Durham

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

School Capacity - Capacity

Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	School Capacity	0	0	0		
DateTime	2012-06-08 11:00:12	0	0	0		
Year	2012	0	0	0		
LEA Number	840	0	0	0		

Capacity and Published Admission Numbers - all schools [View All](#)

Capacity and Published Admission Numbers - new schools [View All](#)

Commentary for LAs with pupil place planning pressures [View](#)

## Notes

You can add notes to the return. If you put this in the return level notes, these notes will always remain against the return despite any re-uploads.

COLLECT Portal

SchoolCapacity

All Errors All Notes Add View Edit Delete Status

SchoolCapacity - Bromley

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

Data Errors

Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	School Capacity	0	0	0		
DateTime	2013-06-21 10:50:36	0	0	0		
Year	2013	0	0	0		
LEA Number	305	0	0	0		

Capacity and Published Admission Numbers - all schools [View All](#)

Capacity and Published Admission Numbers - new schools [View All](#)

Commentary for LAs with pupil place planning pressures [View](#)

## Drill up

In order to navigate throughout the return, screen by screen, you must use the **Drill Up** button highlighted below; this will allow you to move up one level within the return.

The screenshot shows a software interface for 'NewSchool - Durham'. At the top, there is a navigation bar with buttons: 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. Below this, a sidebar on the left contains a tree view with 'SchoolCapacity', 'Commentary', 'School [366]', 'Individual School Data', and 'NewSchool'. The main content area has a header 'NewSchool - Durham' and a 'Drill Up' button circled in red. Below the header, there are several data fields: 'Estab School Name', 'Governance', 'Capacity as at May 2012', 'Number on roll as at May 2012', 'NOR in Excess of Capacity', 'Urban/Rural Indicator', and 'District Code'. A table below these fields has columns: 'Date Item', 'Data Value', 'Errors' (subdivided into 'E' and 'Q'), 'OK Errors', 'Notes', and 'History'.

## Errors and queries

You can gain further information on the **Errors and Queries** associated with the return by clicking on the '**All Errors**' button.

SchoolCapacity

The screenshot shows a software interface for 'SchoolCapacity - Durham'. At the top, there is a navigation bar with buttons: 'All Errors' (circled in red), 'All Notes', 'Add', 'View', 'Edit', and 'Delete'. Below this, a sidebar on the left contains a tree view with 'SchoolCapacity', 'Commentary', 'School [269]', 'Individual School Data', and 'NewSchool'. The main content area has a header 'SchoolCapacity - Durham' and a table with columns: 'Return Level Errors', 'Errors' (subdivided into 'E' and 'Q'), 'OK Errors', and 'Return Level Notes'. The 'Return Level Errors' column contains the value '0', and the 'Return Level Notes' column contains a small icon.

## Screen functionality

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

**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 through a return

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 MyCollect 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, e.g. accesses contract details for a workforce member	Takes you to the sub module level details

## Mode buttons

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



Dark grey text on sunken button with light border = Active Mode

Black text on button and highlighted border = Available Mode

Light grey text on button with light border = Unavailable Mode

## Filter left hand menu

Please avoid using the left hand filter menu to navigate through the return as it does not always display sections of the return in the correct format.

COLLECT Portal

SchoolCapacity

All Errors All Notes Add View Edit Delete

SchoolCapacity

- SchoolCapacity
  - Commentary
  - School [269]
    - Individual School Data
    - NewSchool

SchoolCapacity - Durham						
	Return Level Errors	Errors		OK Errors	Return Level Notes	
		E	Q			
		0	0	0		

School Capacity - Capacity						
Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
Collection	School Capacity	0	0	0		
DateTime	2012-06-08 11:00:12	0	0	0		
Year	2012	0	0	0		
LEA Number	840	0	0	0		
Capacity and Published Admission Numbers - all schools				<a href="#">View All</a>		
Capacity and Published Admission Numbers - new schools				<a href="#">View All</a>		
Commentary for LAs with pupil place planning pressures				<a href="#">View</a>		

## Help

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

If you have any queries or have a change to your contact details please could you complete a [Service Request form](#) and select the option school capacity.



Department  
for Education

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About this publication:

enquiries <https://www.education.gov.uk/form/data-collection-request-form>

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