

# School capacity (SCAP) forecast 2014

**COLLECT** guide

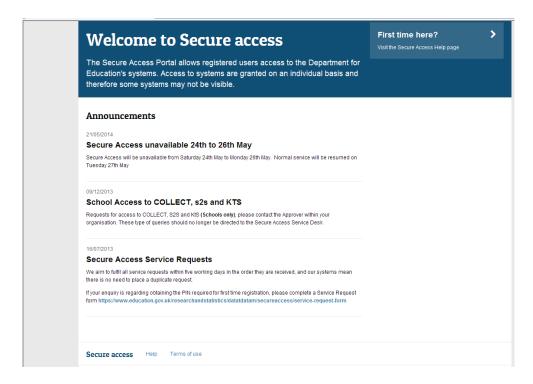
**May 2014** 

# Contents

COLLECT and Secure Access	3
Adding a return on screen	6
Updating forecast by LA district primary & secondary	8
Loading forecast data	11
Validation check for authorities	13
Inputting forecast methodology	15
Submitting your return	16
Launching reports	17
Extra functions of COLLECT	19
Notes	19
Errors and queries	20
Screen functionality	21
Navigation through a return	21
Mode buttons	22
Filter left hand menu	22
Help	23

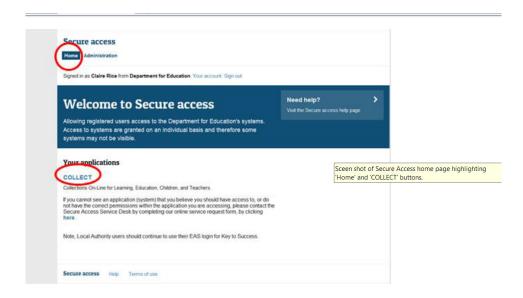
### **COLLECT and Secure Access**

Access to COLLECT is through the Department's Secure access system

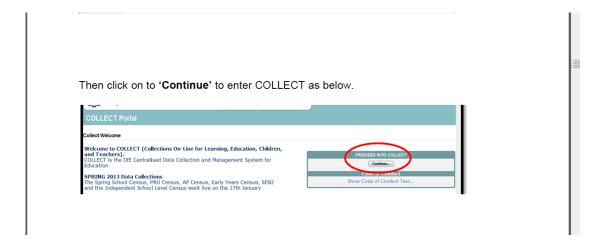


Full secure access guides are published on the **Secure Access Website**.

Once successfully registered click on to **Home** and then click onto **COLLECT** to enter COLLECT as below

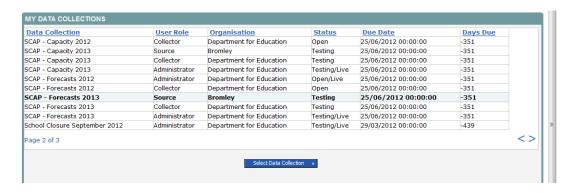


### Then click on to Continue to enter COLLECT as below

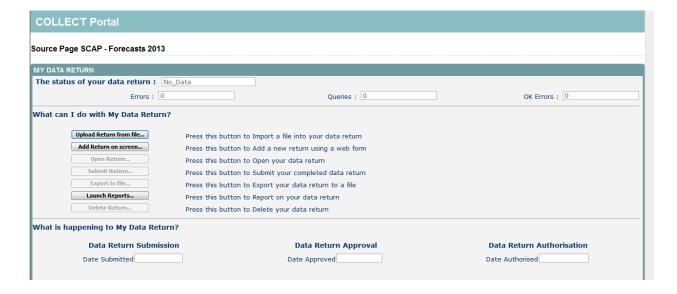


# Please note some screen shots refer to 2013 however the process is the same for all 2014 collections.

Select the collection by clicking on the collection name to highlight it (if there is only one it will be automatically highlighted) and then click on the 'Select Data Collection' button to open it.



### The Source main screen will be displayed



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.



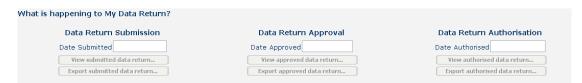
### **Return management**

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



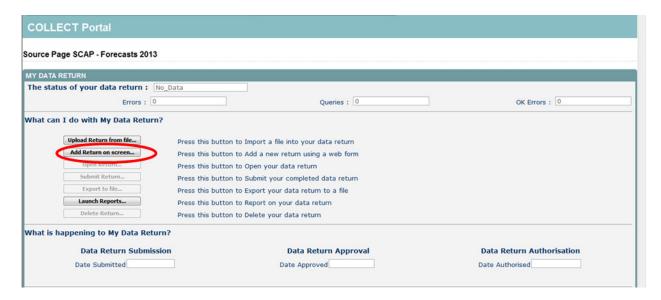
### **Return progress**

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.

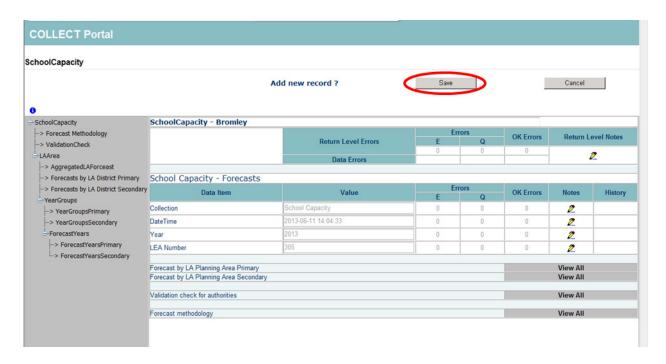


# Adding a return on screen

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



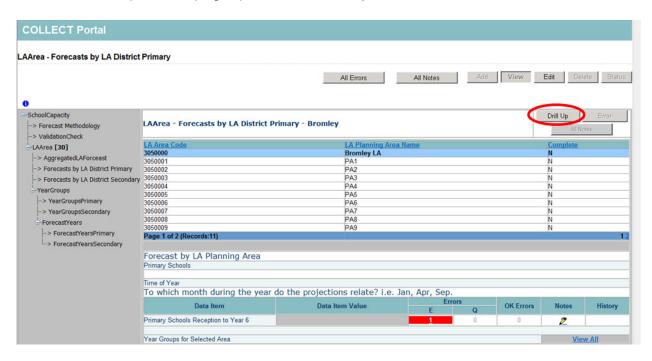
The following screen will be displayed; please click on the 'Save' button, to start your return.



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

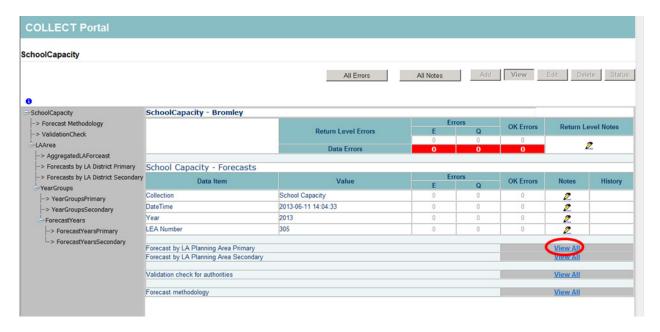


To return to the previous page, press the 'Drill Up' button.

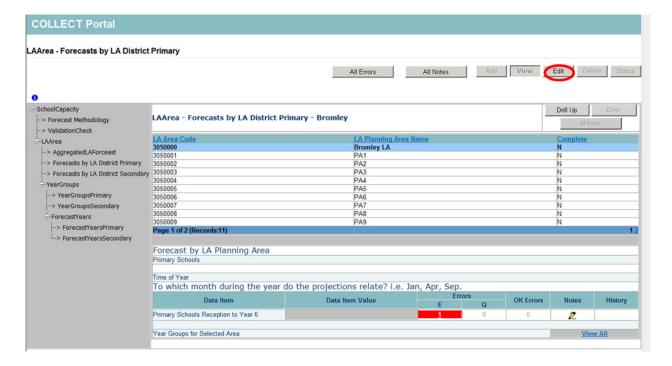


# **Updating forecast by LA district primary & secondary**

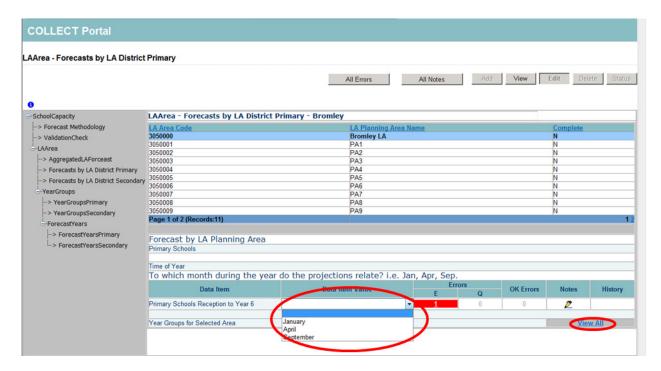
You need to update the forecast by LA sections of the return. To do this you need to click on the 'View All' for primary or secondary.



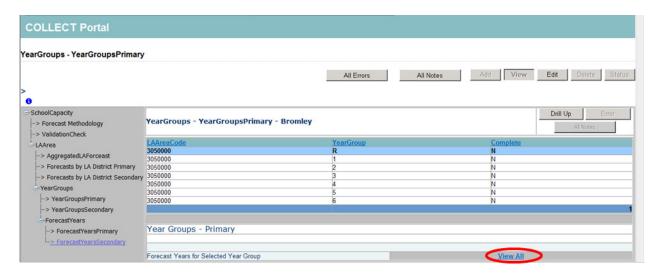
You will then be presented with the following screen. You may have more than one district here, please select the one you want to update first by clicking on it, this will highlight the selected district in blue, then click the **edit** button.



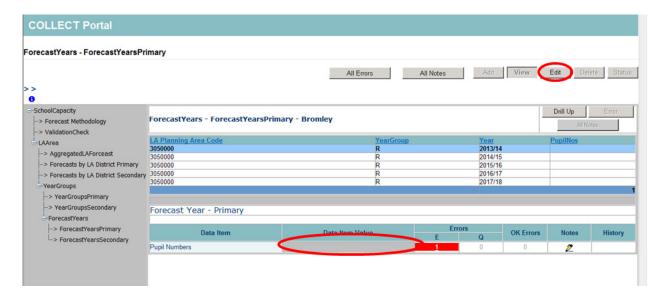
Please use the dropdown box to select the month the projections relate to. Then click on the 'View All' link for year groups for selected districts.



Please select the year group you want to update by clicking on it, this will highlight it in blue, then click the 'View all' link.



Please select the academic year you want to update by clicking on it, this will highlight it in blue, then click the 'edit' button. Enter the forecast in the box below. Once you click out of the box the data will be populated in the pupil numbers section below. Complete this for all years shown.

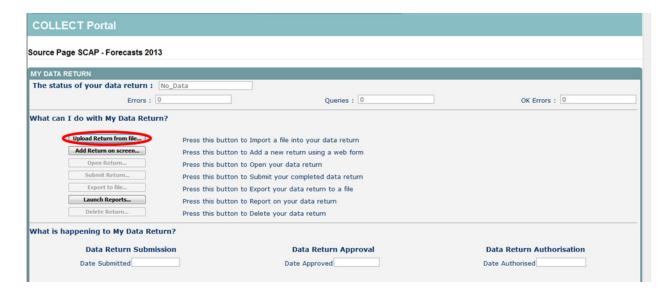


## Loading forecast data

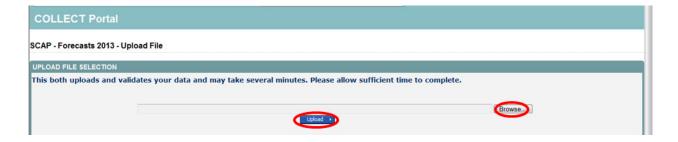
You can also load your forecast data as an XML File, to do this you must return to your SOURCE page, which you can do by clicking 'Back to my COLLECT page' at the top of the screen, next to help.



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.

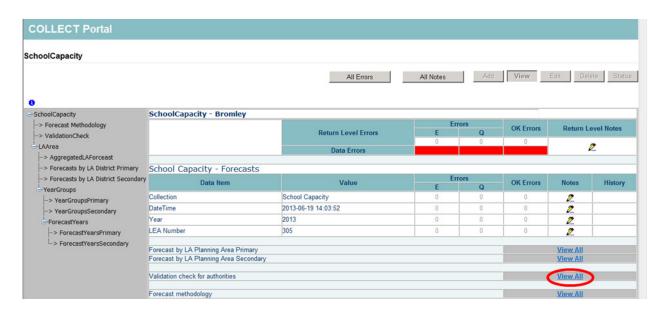


Once the upload has completed the source main page will be redisplayed and the return status section will have been updated to "Loaded\_and\_Validated" the total number of errors and queries found in the return will be displayed. Additional function buttons will now be available in the Return Management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

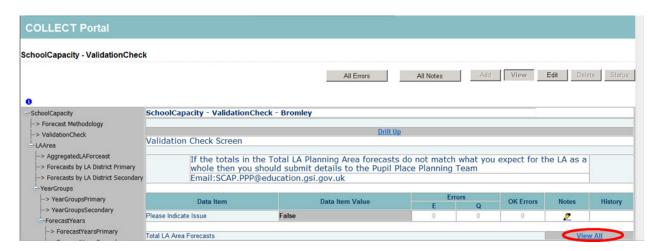


## Validation check for authorities

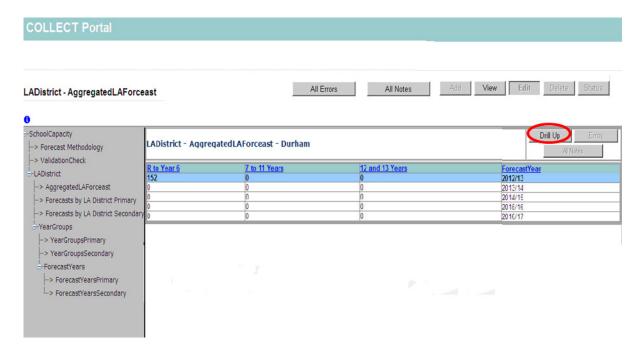
You will need to check this part of the return. Please click the 'View all' link to access this section.



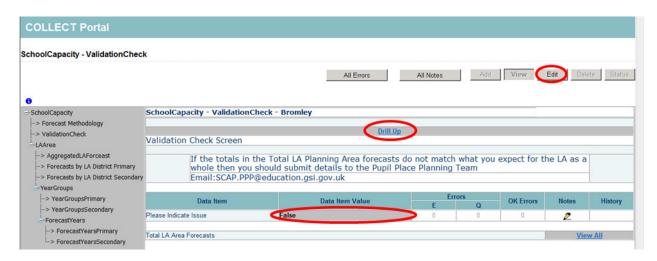
Please select the 'View all' for Total LA district forecasts to view your data.



Please check your Aggregated LA forecast is as you expected. To go back to the previous screen please click the **Drill up** button.



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

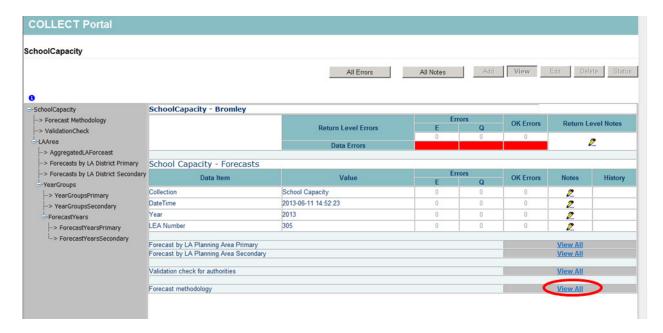


You will then need to select from the drop down box to indicate if there is an issue. If you enter '**True**' you will need to submit details to partnership for schools via email.

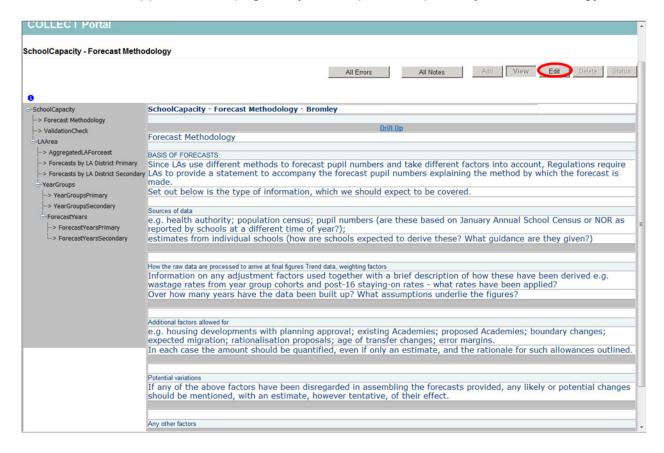
Once this page is completed click on the 'drill up' button in the middle of the page to go back to the main page.

# Inputting forecast methodology

On the main page, click on the 'View all' for forecast methodology.

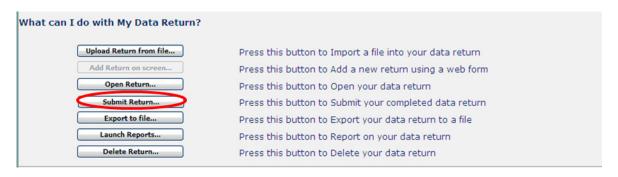


When on the forecast methodology page, you must then press the 'Edit' button, various boxes will then appear on the page for you to input each part of your methodology.



# **Submitting your return**

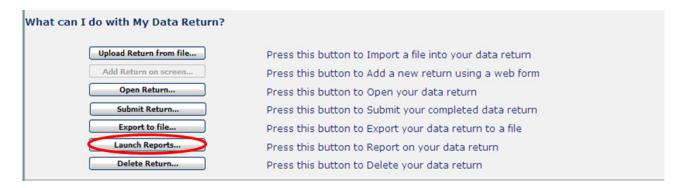
In order to submit your return, you must first return to your source page by pressing the 'Back to My COLLECT' at the top of the page next to help, you will then see the screen below. You will notice that there are various other buttons available, you just need to press 'Submit Return' and you will see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



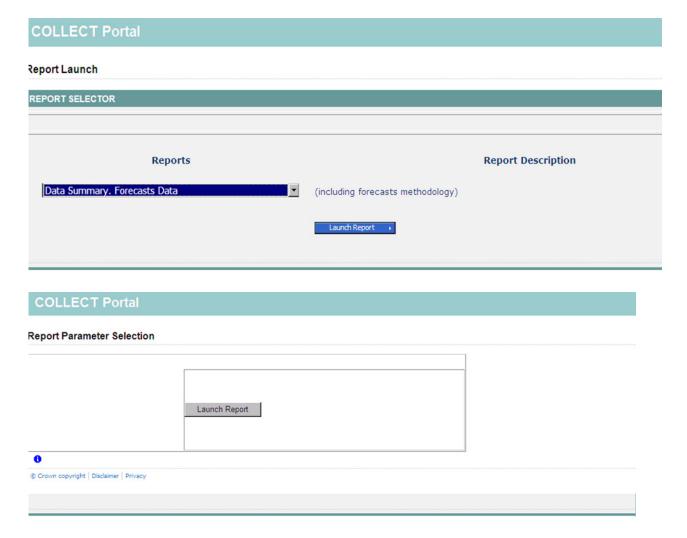
# Launching reports

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.

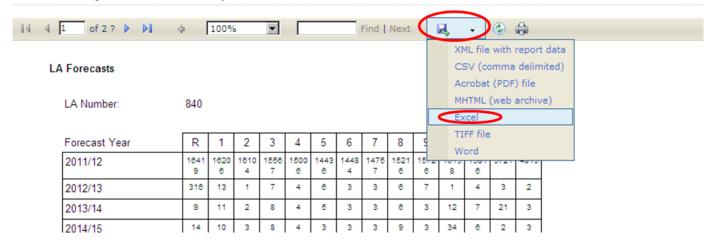


You can select one of the reports from the drop down box and click 'Launch Report' then on the next screen 'Launch Report' again to confirm.



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.** 

### Data Summary. Forecasts Data Report

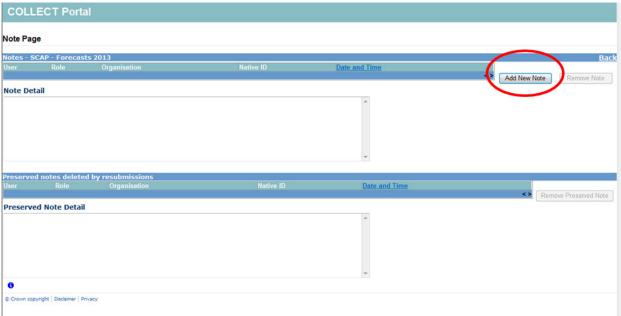


### **Extra functions of COLLECT**

### **Notes**

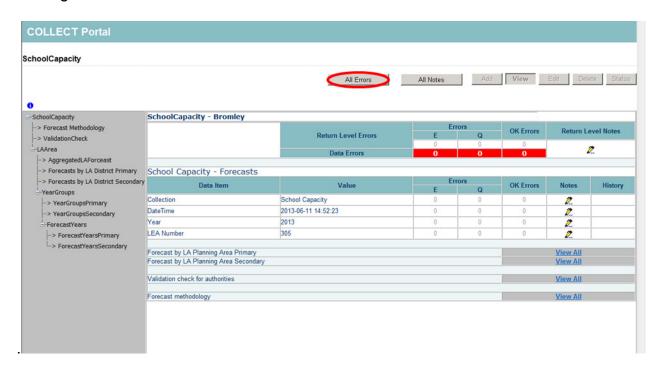
You can add notes to the return i.e. to indicate that you have been back in to the return and checked the pre-populated data. If you put this in the return level notes, these notes will always remain against the return despite any re-uploads.





# **Errors and queries**

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



# **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.



# 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 <u>Service Request form</u> a service request form and select the option school capacity.



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Reference: DFE-00432-2014

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