



Department
for Education

School census 2014 to 2015

**COLLECT guide for academies, free
schools, studio schools, UTCs and NMSS**

September 2014

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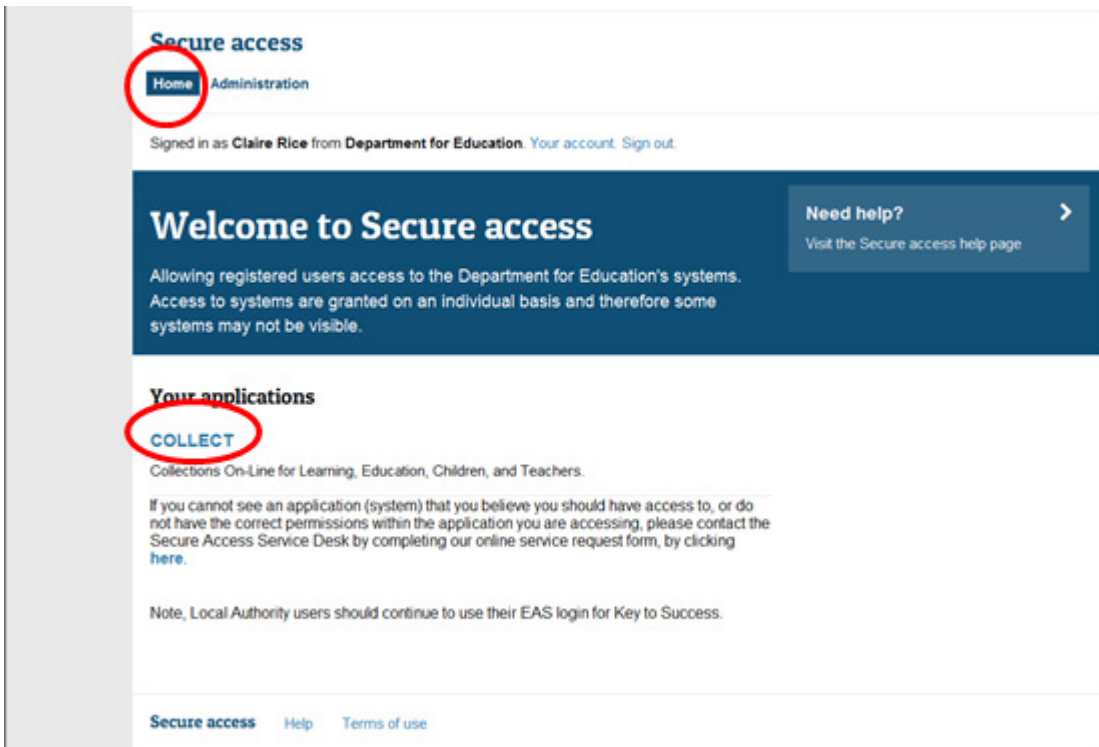
COLLECT and Secure Access

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

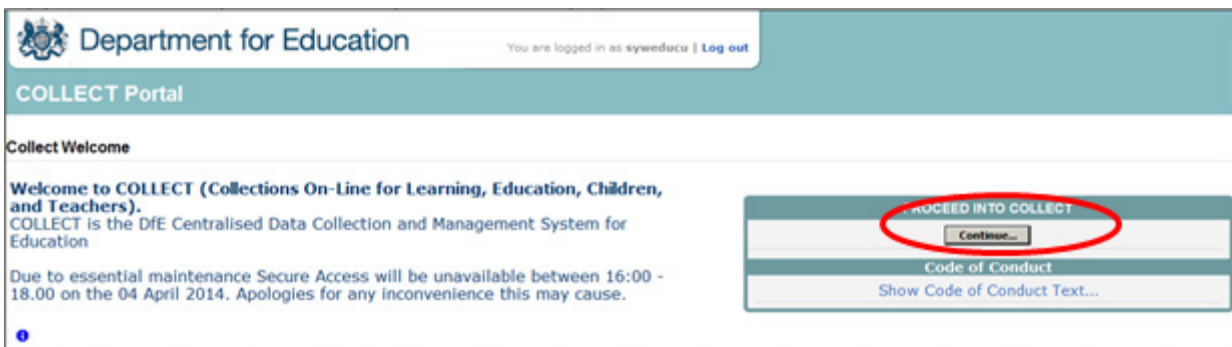
The screenshot shows the 'Secure access' portal. At the top, there is a header 'Secure access' and a link for 'Forgotten username or password?'. Below this are input fields for 'Username' and a password field (represented by dots). To the right of the password field is a checkbox labeled 'I agree to the terms of use' and a 'Sign in' button. A large blue banner contains the text 'Welcome to Secure access' and a sub-header 'First time here?' with a right-pointing arrow and the text 'Visit the Secure Access Help page'. Below the banner is a section titled 'Announcements' with three entries: 1) '07/04/2014 S2S Secure Data Transfer - Essential Maintenance' with details about system unavailability on 8th April 2014; 2) '28/03/2014 Secure Access - Scheduled Downtime' with details about unavailability on Friday 4th April 4-6pm; 3) '09/12/2013 School Access to COLLECT, s2s and KTS' with a note about school access requests.

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.



MY DATA COLLECTIONS

Data Collection	User Role	Organisation	Status	Due Date	Days Due
Consistent Financial Reporting_2013-2014	Collector	Department for Education	Open	19/07/2014 00:00:00	103
Consistent Financial Reporting_2013-2014	Agent	Darlington	Open	19/07/2014 00:00:00	103
Consistent Financial Reporting_2013-2014	Source	Whinfield Primary School	Open	19/07/2014 00:00:00	103
Consistent Financial Reporting_2013-2014	Administrator	Department for Education	Open/Live	19/07/2014 00:00:00	103
School Preference Primary Return 2014	Administrator	Department for Education	Testing/Live	24/04/2014 00:00:00	17
School Preference Primary Return 2014	Collector	Department for Education	Testing	24/04/2014 00:00:00	17
SchoolCensus 2014_Autumn	Administrator	Department for Education	Testing/Live	02/10/2014 00:00:00	178
SchoolCensus 2014_Summer	Collector	Department for Education	Testing	16/05/2014 00:00:00	39
SchoolCensus 2014_Summer	Agent	Department for Education	Testing	16/05/2014 00:00:00	39
SchoolCensus 2014_Summer	Administrator	Department for Education	Testing/Live	16/05/2014 00:00:00	39

[Select Data Collection](#)

News

Welcome to COLLECT (Collections On-Line for Learning, Education, Children, and Teachers).
 COLLECT is the DFE Centralised Data Collection and Management System for Education

Due to essential maintenance Secure Access will be unavailable between 16:00 -18.00 on the 04 April 2014. Apologies for any inconvenience this may cause.

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

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?

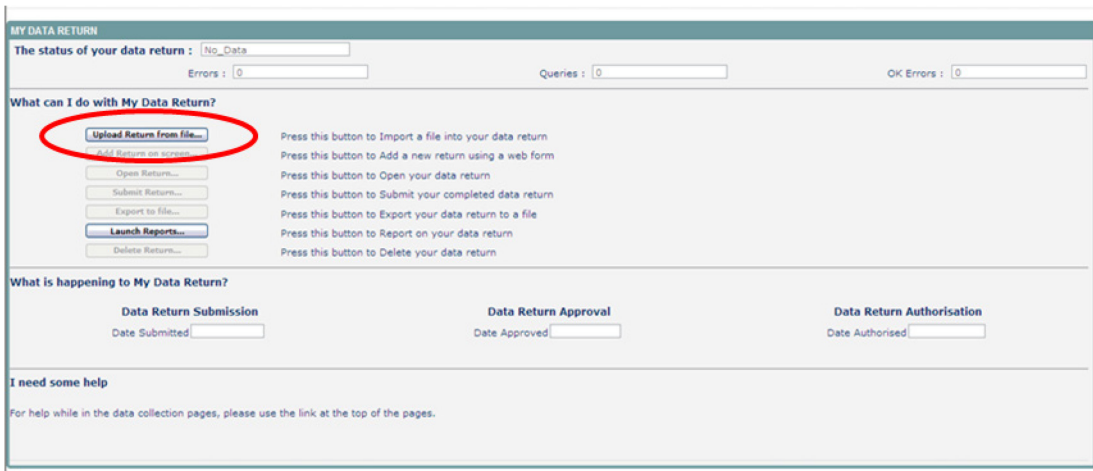
Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

I need some help

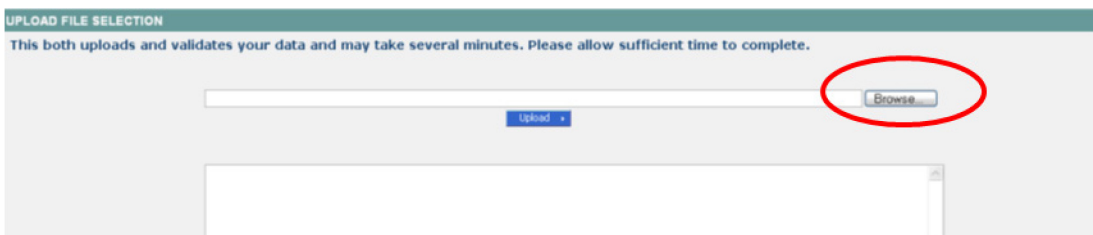
For help while in the data collection pages, please use the link at the top of the pages.

Loading a Return

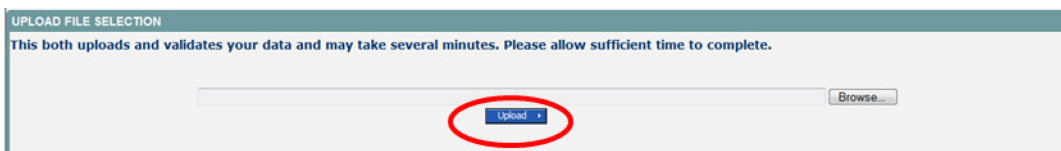
1) Click on **Upload return from file**



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.

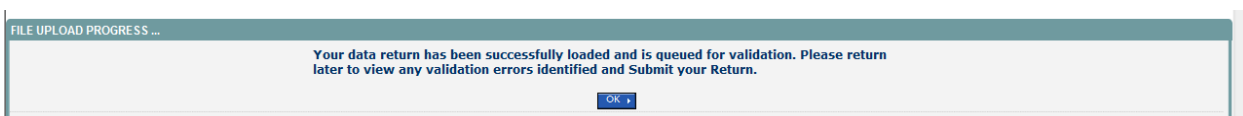


A progress message may be displayed while the upload is taking place.

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.

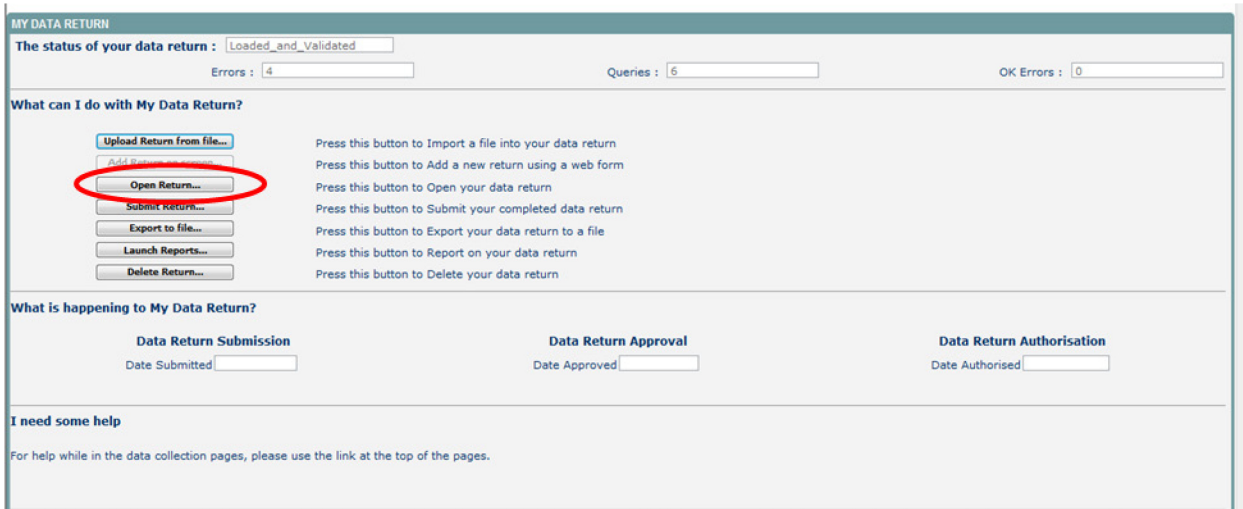
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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.

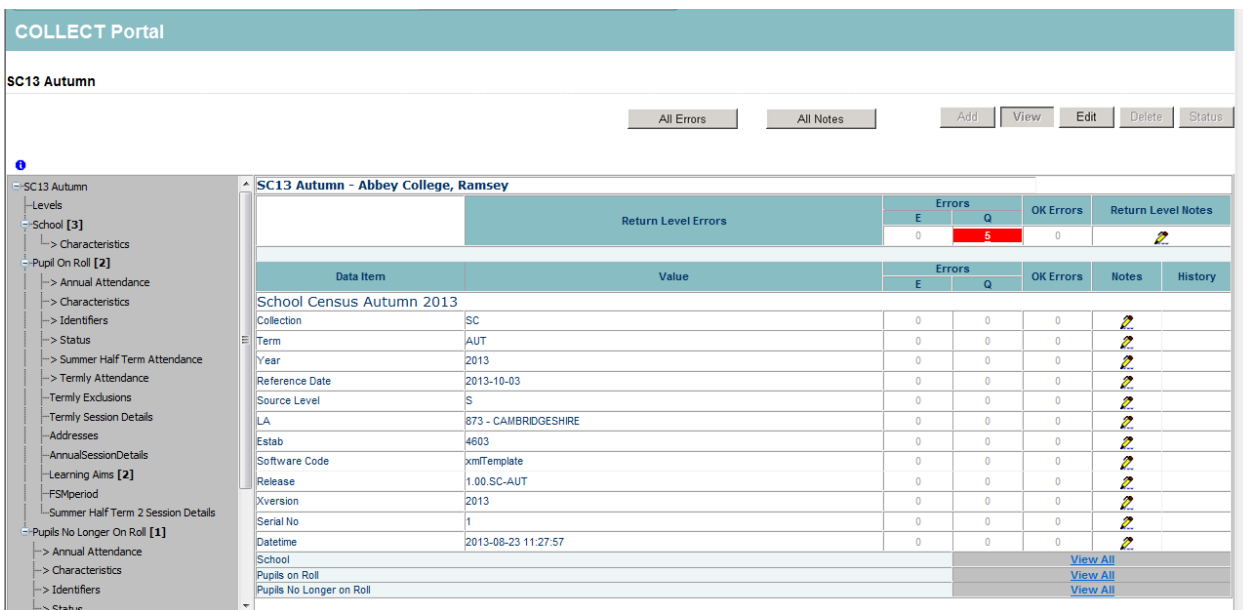
The screenshot shows the 'COLLECT Portal' interface. The main heading is 'Source Page SchoolCensus 2013_Autumn'. Below this is the 'MY DATA RETURN' section. A red oval highlights the following information: 'The status of your data return : Loaded_and_Validated', 'Errors : 4', 'Queries : 6', and 'OK Errors : 0'. Below this, there is a section titled 'What can I do with My Data Return?' with several buttons and their descriptions: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...'. At the bottom, there 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). Finally, there is a section titled 'I need some help' with a link to the help page.

Viewing the Return Details

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



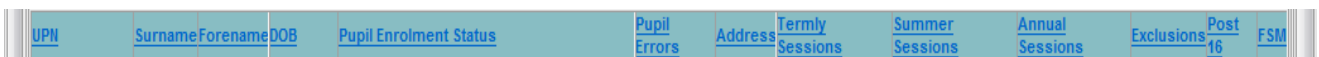
Your return will then be displayed



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 2014.

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

The screenshot shows the COLLECT Portal interface for 'SC13 Autumn' at 'Abbey College, Ramsey'. At the top, there are buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. The 'Edit' button is circled in red. Below this, a navigation tree on the left shows the hierarchy: SC13 Autumn > Levels > School [3] > Pupil On Roll [2] > Annual Attendance > Characteristics > Identifiers > Status. The main content area displays 'School Census Autumn 2013' with a table of data items and their values. The table has columns for 'Data Item', 'Value', 'Errors' (E, Q), 'OK Errors', 'Notes', and 'History'. The 'Errors' column for 'Source Level' is highlighted in red with the value '5'. At the bottom of the table, there are links for 'View All' for 'School', 'Pupils on Roll', and 'Pupils No Longer on Roll'.

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		

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.

The screenshot shows the 'COLLECT Portal' interface. Under the 'MY DATA RETURN' section, the status is 'Loaded_and_Validated'. A red oval highlights the summary area containing the following information:

- The status of your data return : Loaded_and_Validated
- Errors : 4
- Queries : 6
- OK Errors : 0

Below this, there are several action 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 instruction.

Further down, there are sections for 'Data Return Submission', 'Data Return Approval', and 'Data Return Authorisation', each with a date field.

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	

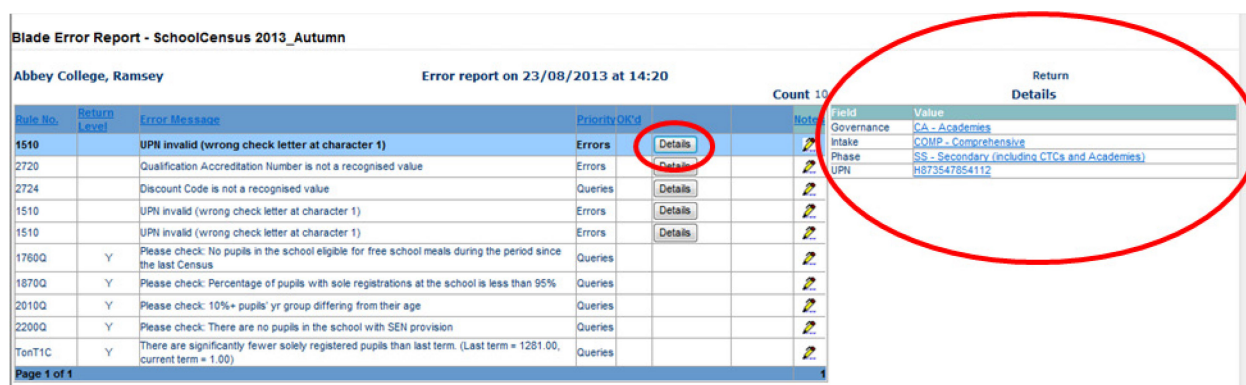
Below this table, there is another table with columns: Data Name, Value, Errors, OK Errors, Notes, and History.

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 Error Report - SchoolCensus 2013_Autumn

Abbey College, Ramsey Error report on 23/08/2013 at 14:20

Rule No.	Return Level	Error Message	Priority (OK'd)	Count	Notes	Field	Value
1510		UPN invalid (wrong check letter at character 1)	Errors				
2720		Qualification Accreditation Number is not a recognised value	Errors			Governance	CA - Academies
2724		Discount Code is not a recognised value	Queries			Intake	COMP - Comprehensive
1510		UPN invalid (wrong check letter at character 1)	Errors			Phase	SS - Secondary (including CTCs and Academies)
1510		UPN invalid (wrong check letter at character 1)	Errors			UPN	H873547854112
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				

Page 1 of 1

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

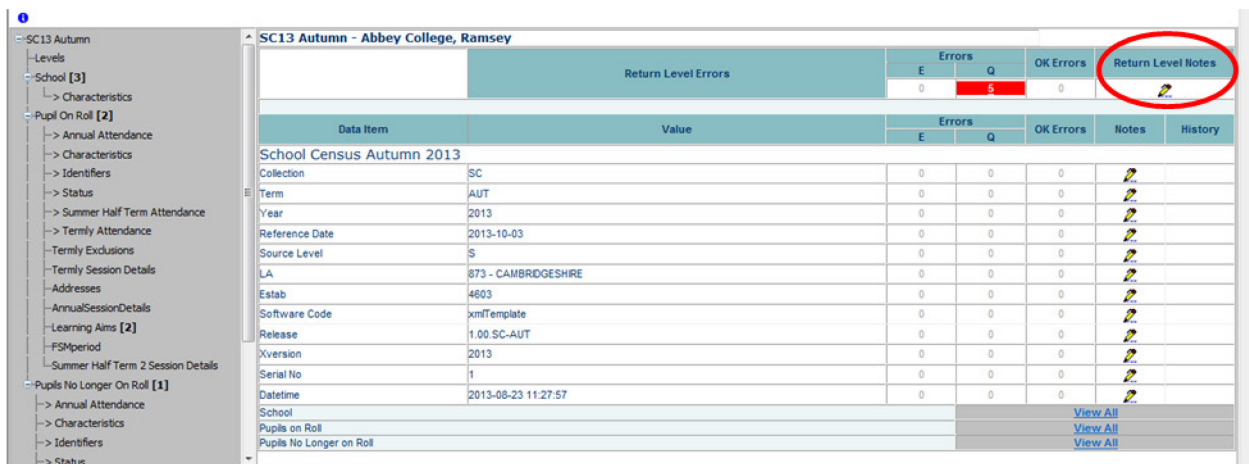
In some instances you will be requested to provide explanatory information (as part of email communications you will receive a document which will provide guidance on what notepad explanation would be expected for individual queries. This will also be made available on our web page [School Census 2014](#)) 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.



Return Level Errors		Errors		OK Errors	Return Level Notes
E	Q	E	Q		
0	5	0	0	0	

Data Item	Value	Errors		OK Errors	Notes	History
		E	Q			
School Census Autumn 2013						
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	4603	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					View All	
Pupils on Roll					View All	
Pupils No Longer on Roll					View All	

- 2) Click add new note



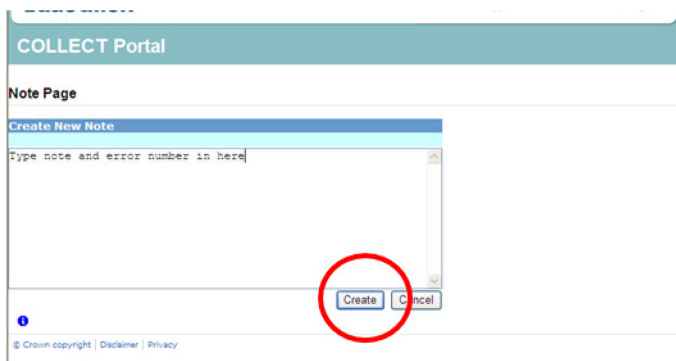
Note Detail

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.



The screenshot shows a web interface for the COLLECT Portal. At the top, there is a teal header with the text 'COLLECT Portal'. Below this is a section titled 'Note Page'. Underneath, there is a sub-section 'Create New Note'. This section contains a text input field with the placeholder text 'Type note and error number in here'. At the bottom of this section, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is highlighted with a red circle.

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'.

The screenshot shows the 'COLLECT Portal' interface. At the top, it says 'Source Page SchoolCensus 2013_Autumn'. Below that, the 'MY DATA RETURN' section shows 'The status of your data return : Loaded_and_Validated'. There are input fields for 'Errors : 4', 'Queries : 6', and 'OK Errors : 0'. A section titled 'What can I do with My Data Return?' contains several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Returns...', 'Submit Return...' (circled in red), 'Export to file...', 'Launch Reports...', and 'Delete Return...'. Below this, 'What is happening to My Data Return?' shows three columns: 'Data Return Submission' with 'Date Submitted' field, 'Data Return Approval' with 'Date Approved' field, and 'Data Return Authorisation' with 'Date Authorised' field. At the bottom, there is a 'I need some help' section with a link to help 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

This screenshot shows the same 'COLLECT Portal' interface after the return has been submitted. 'The status of your data return' is now 'Submitted' (circled in red). The 'Submit Return...' button is now disabled. In the 'Data Return Submission' section, the 'Date Submitted' field is now populated with '23/08/2013' (circled in red). The other fields and sections remain the same as in the previous screenshot.

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
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: 23/08/2013	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.

- 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 2014](#)

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

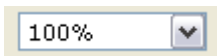
Along the top of the report you will see a toolbar with various functions.



These are explained as follows.



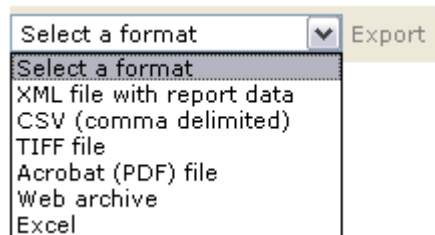
Allows you to navigate between pages of the report.



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.

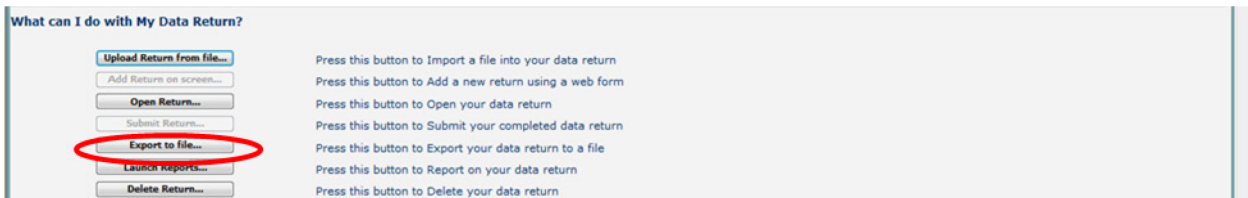
Exporting a return

A return can be exported in xml or csv format

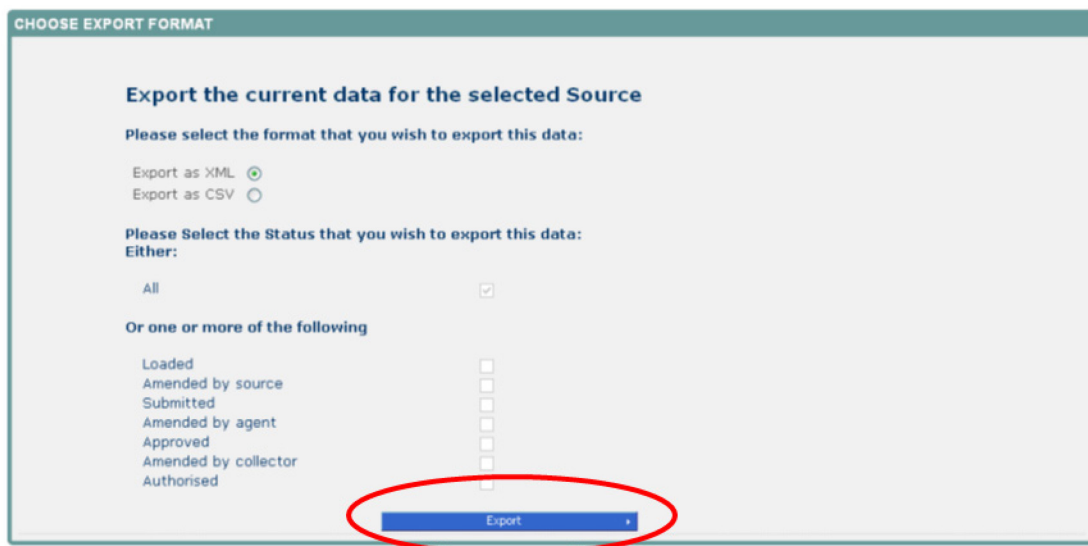
Exporting a return (Current state)

On the **Source** page

- 1) Click on Export to file

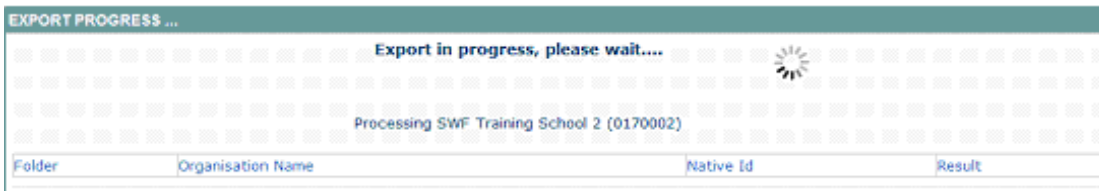


- 2) Choose to export in either XML or CSV format, then click on the **Export** button.



- 3) A progress message will be displayed

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.

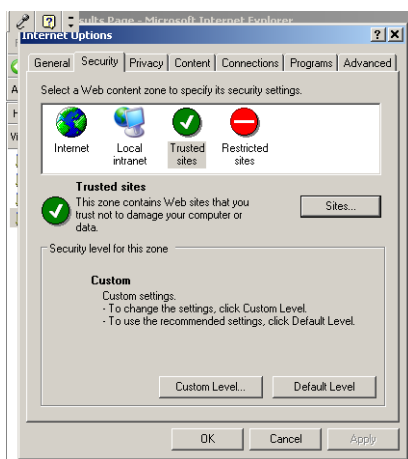
Export Results Page			
INFORMATION			
Export Finished.			
EXPORT RESULTS			
Results of export			
Folder	Organisation Name	Native Id	Result
/EstabNo=8734603	Abbey College, Ramsey	8734603	Data Collected

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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.



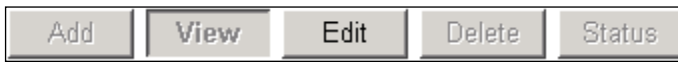
Navigation controls

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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