



Department  
for Education

# **School census 2014 to 2015**

## **COLLECT guide for LAs**

**September 2014**

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# COLLECT and Secure Access

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

**Secure access**

[Forgotten username or password?](#)

Username  Password

☐ I agree to the [terms of use](#) [Sign in](#)

## Welcome to Secure access

The Secure Access Portal allows registered users access to the Department for Education's systems. Access to systems are granted on an individual basis and therefore some systems may not be visible.

**First time here?** [Visit the Secure Access Help page](#)

### Announcements

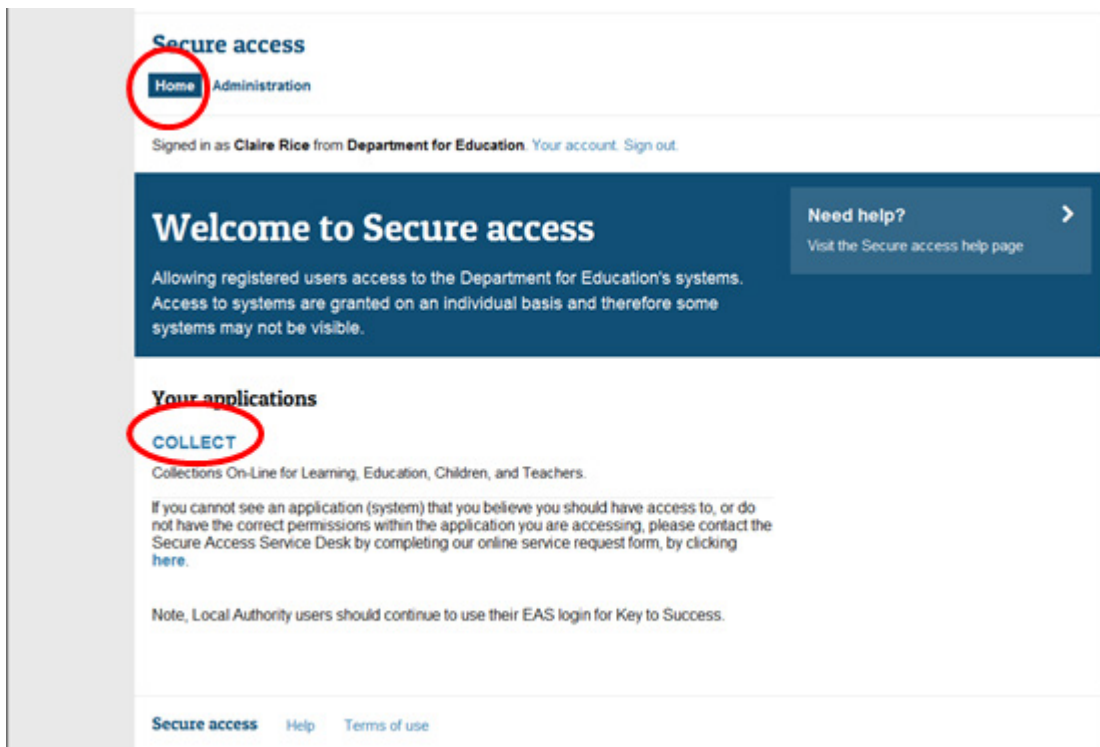
07/04/2014  
**S2S Secure Data Transfer - Essential Maintenance**  
Users should note that the Secure Data Transfer system s2s, will be unavailable on **8th April 2014 between 07:00 - 09:00** for essential maintenance.

28/03/2014  
**Secure Access - Scheduled Downtime**  
Due to essential maintenance, Secure Access will be unavailable on **Friday 4th April 4-6pm**.

09/12/2013  
**School Access to COLLECT, s2s and KTS**  
Requests for access to COLLECT, S2S and KTS (**Schools only**), please contact the Approver within your organisation. These type of queries should no longer be directed to the Secure Access

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



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.\***

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
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
<b>SchoolCensus 2014_Summer</b>	<b>Collector</b>	<b>Department for Education</b>	<b>Testing</b>	<b>16/05/2014 00:00:00</b>	<b>39</b>
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

Collection Status

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.

## Agent Page

The Agent (Local Authority) main screen will now be displayed listing all the schools for your LA.

The screenshot shows the 'MY SOURCES' interface. At the top, there is a 'Filter By:' section with dropdown menus for Name, Native ID, Status, Org Group, and Queue, along with 'Go' and 'Reset' buttons. Below this is a 'Performance summary' table with columns: Expected, Outstanding, Submitted, Approved, Authorised, and Errors (subdivided into E, Q, OK). The data row shows: Expected: 3042, Outstanding: 3040, Submitted: 2, Approved: 0, Authorised: 0, Errors: E=74, Q=118, OK=0. The main section is a table of 'Sources' with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The first row is highlighted in blue and shows Source ID 8734603, Source Name 'Abbey College, Ramsey', Status 'No\_Data', and Queue 'Academies'. Below the table are several action buttons: 'Open Returns...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', 'Export All...', 'Upload Returns for selected Source...', 'Upload Multiple Returns (zip file)', 'Add Return on screen...', 'Agent Administration...', 'Validate Selected Returns...', 'Validate All Non-validated Returns...', 'Launch Reports...', 'Queue Management...', 'Change Queue...', and 'Move to this queue:'. A dropdown menu at the bottom right shows 'Academies'.

The Agent screen comprises four main sections:

- Filter by
- Performance Summary
- Sources
- Agent Functions

## Filter By

This screenshot shows the 'Filter By:' section of the interface. It contains five dropdown menus labeled 'Name', 'Native ID', 'Status', 'Org Group', and 'Queue'. To the right of these dropdowns are 'Go' and 'Reset' buttons.

This section allows you to limit the number of schools displayed in the source section of the screen. It can be used to display a single school or a group of schools that have the same characteristics.

For example by entering an estab number in the 'Native ID' and selecting the 'Go' button then only the school with that estab will appear on the screen. This saves the user having to go through numerous screens to get to the particular school return they want to work on

The user can only change the sort order by clicking on one of the headers with a blue text. For example by clicking on the 'Source Name' header all the schools in the LA return will be sorted in ascending School Name order, click again and they will be sorted in descending School Name order.

## Performance Summary

Performance summary							
Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
2533	2530	3	0	0	75	51	0

This area of the screen shows a breakdown of the status of the returns for the authority's schools that are part of the collection.

It shows

- The total number of schools that a return is expected from;
- The total number of schools who have yet to submit their return;
- The total number of schools who have submitted their return;
- The total number of school returns approved by the Local authority;
- The total number of school returns authorised by the DfE;
- The total number of errors across all returns, sorted by error severity.

This section is refreshed any time a change is made to the underlying data e.g. when the status of a school return has changed from 'Submitted' to 'Approved', the approved total will be incremented by 1, while the submitted total will decrease by 1.

## Sources

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	22/11/2012			Academies	23	14	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No [Source Status Grid]				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
3115401	Abbe Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
8949906	Abraham Darby Academy	No_Data				Academies	0	0	0
3994001	Abraham Guest Academy	No_Data				Academies	0	0	0
3949905	Academy 360	No_Data				Academies	0	0	0

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2 3 4 5 6 7 8 9 10 ...

This section lists all of the data sources for whom a data return is expected for the collection (unless a filter has been applied).

## Agent Functions

This section contains the functions that an Agent (LA) can use to manage the returns it is responsible for.

## Loading a Return for a single school

1) Click on the school you wish to load data for and click on the **Upload return for selected source** button.

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue Go Reset

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3042	3040	2	0	0	74	118	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	No_Data				Academies	0	0	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0
8946906	Abraham Darby Academy	No_Data				Academies	0	0	0

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2 3 4 5 6 7 8 9 10 ...

Upload Return for selected Source... Upload Multiple Returns (zip file)... Add Return on screen... Agent Administration... Launch Reports... Queue Management... Change Queue... Move to this queue... Academies

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

**UPLOAD FILE SELECTION**

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

Upload + Browse

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

**UPLOAD FILE SELECTION**

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

Upload + Browse

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

Uploading School1.xml

**FILE UPLOAD PROGRESS ...**

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

Loading raw return data, 243 elements processed

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

**FILE UPLOAD PROGRESS ...**

Your data return has been successfully loaded and is queued for validation. Please return later to view any validation errors identified.

OK

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 agent 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

*The only difference being that when an LA uploads a return then the status will be set to 'Submitted'. When a School uploads a return the status will be set to 'Loaded & Validated'.*

Once the return has been validated, the return status section on the source main page will display "Submitted" and the date. The total number of errors and queries found in the return will also be displayed. Additional function buttons will also be available in the Return Management section.

**COLLECT Portal**

Agent Page SchoolCensus 2013\_Autumn

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	2	0	0	6	22	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	0	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

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Academies

## Uploading multiple files

LAs can load multiple return files in a single transaction, rather than having to load each file individually. Before the facility can be used all files to be loaded must be placed in a zip file.

To access the facility, click on the **Upload Multiple Returns (zip file)** button.

The screenshot shows the 'MY SOURCES' interface. At the top, there's a filter section with fields for Name, Native ID, Status, Org Group, and Queue, along with 'Go' and 'Reset' buttons. Below this is a 'Performance summary' table with columns: Expected (3042), Outstanding (3040), Submitted (2), Approved (0), Authorised (0), and Errors (E: 74, Q: 118, OK: 0). The main section is a table of 'Sources' with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Output, Errors, Queries, and OK Errors. The first row is highlighted. Below the table is a row of buttons: 'Open Returns...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. The 'Upload Multiple Returns (zip file)' button is circled in red.

Click on the **Browse** button to navigate to the zip file in Explorer (ExampleZipFile.zip) that you want to upload.

The screenshot shows the 'UPLOAD FILE SELECTION' interface. It has a header bar with the title 'UPLOAD FILE SELECTION'. Below the header, there's a message: 'This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.' Below this message is a file upload area with a text input field and a 'Browse' button circled in red. There is also an 'Upload' button.

Once found, click on the **Upload** button to load the data into COLLECT. After the upload has been initiated a progress screen may be displayed, which will show details of the files as they are being loaded.

The screenshot shows the 'FILE UPLOAD PROGRESS' interface. It has a header bar with the title 'FILE UPLOAD PROGRESS'. Below the header, there's a progress bar and a message: 'Data return upload in progress, please wait....'. Below the progress bar, there's a message: 'Loading raw return data, 132 elements processed'. At the bottom, there's a table with columns: File Name, Level Tag, Level Value, Organisation Type, Native ID Tags, Native ID, Source Organisation, and Upload Result.

Once a file is validated a results screen will show whether the file was successfully loaded.

## Viewing the Return Details

Select a return from the 'Agent' screen by clicking on school row and click on 'Open Return' to view it.

**COLLECT Portal**

Agent Page SchoolCensus 2013\_Autumn

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	2	0	0	6	22	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	6	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

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Academies

You can view the return details by clicking on the various 'View All' links at the bottom of the screen.

School	<a href="#">View All</a>
Pupils on Roll	<a href="#">View All</a>
Pupils No Longer on Roll	<a href="#">View All</a>

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.

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

## Editing Data within the Return

The default view when a screen is displayed is 'View' mode. To edit the details click on the 'Edit' button.

**COLLECT Portal**

SC13 Autumn

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

**SC13 Autumn - Abbey College, Ramsey**

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	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						<a href="#">View All</a>
Pupils on Roll						<a href="#">View All</a>
Pupils No Longer on Roll						<a href="#">View All</a>

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.

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	6	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

## 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.

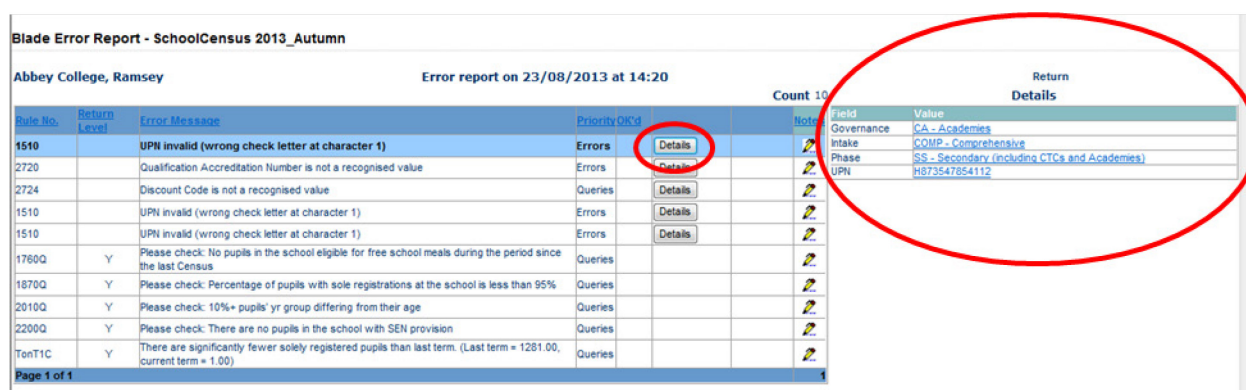
Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		0	6	0	

## 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.

A screenshot of the 'Blade Error Report - SchoolCensus 2013\_Autumn' page. The page shows a table of errors and queries for 'Abbey College, Ramsey'. The table has columns for 'Rule No.', 'Return Level', 'Error Message', 'Priority OKM', and 'Details'. The 'Details' column contains buttons labeled 'Details'. One of these buttons is circled in red. To the right of the table is a 'Return Details' panel, also circled in red, which shows a list of fields and their values: Governance (CA - Academes), Intake (COMP - Comprehensive), Phase (SS - Secondary (including CTCs and Academes)), and UPN (H873547854112).

Rule No.	Return Level	Error Message	Priority OKM	Details
1510		UPN invalid (wrong check letter at character 1)	Errors	<a href="#">Details</a>
2720		Qualification Accreditation Number is not a recognised value	Errors	<a href="#">Details</a>
2724		Discount Code is not a recognised value	Queries	<a href="#">Details</a>
1510		UPN invalid (wrong check letter at character 1)	Errors	<a href="#">Details</a>
1510		UPN invalid (wrong check letter at character 1)	Errors	<a href="#">Details</a>
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	

## 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) Contact the relevant school – advise they need to correct in their MIS and re-load their 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 school reflect this change in their MIS
- 3) As schools can now edit their own data the third option is - Contact the relevant school and ask them to 'Edit' the data, reflecting in their MIS, ensuring they re-submit their data on COLLECT.

## 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 the Local Authority 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 COLLECT Portal interface. At the top, there's a header 'COLLECT Portal' and a sub-header 'SC13 Autumn'. Below this, there are buttons for 'Approve', 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. The main content area is titled 'SC13 Autumn - Abbey College, Ramsey'. It features a table with columns for 'Data Item', 'Value', 'Errors' (with sub-columns 'E' and 'Q'), 'OK Errors', 'Notes', and 'History'. The table lists various data items such as 'Collection', 'Term', 'Year', 'Reference Date', 'Source Level', 'LA', 'Estab', 'Software Code', 'Release', 'Xversion', 'Serial No', and 'Datetime'. The 'Return Level Notes' section is highlighted with a red circle, and a pen icon is visible next to it. The sidebar on the left contains a tree view of the data items.

2) Click add new note

The screenshot shows the 'Note Detail' page in the COLLECT Portal. At the top, there is a navigation bar with tabs for 'Note', 'Organisation', 'History', and 'Note Detail'. Below the navigation bar, there is a section titled 'Note Detail' with a large text area for entering a note. To the right of the text area, there are two buttons: 'Add New Note' and 'Remove Note'. The 'Add New Note' button is circled in red. Below the 'Note Detail' section, there is a table titled 'Preserved notes deleted by resubmissions' with columns for 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. Below the table, there is a section titled 'Preserved Note Detail' with a large text area for entering a note. To the right of the text area, there is a button labeled 'Remove Preserved Note'.

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

The screenshot shows the 'Create New Note' dialog box in the COLLECT Portal. The dialog box has a title bar that says 'COLLECT Portal' and a subtitle 'Note Page'. Below the subtitle, there is a section titled 'Create New Note' with a large text area for entering a note. The text area contains the placeholder text 'Type note and error number in here'. At the bottom of the dialog box, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is circled in red. Below the dialog box, there is a footer with the text '© Crown copyright | Disclaimer | Privacy'.

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

## Approving the Return

The LA is responsible for 'approving' the return once the school has 'submitted' it. The LA is expected to investigate and resolve any outstanding return errors before approving a return.

To 'Approve' a return:

- 1) Go to the 'agent main screen' and select the school by clicking on its name.

The screenshot shows the 'COLLECT Portal' interface. At the top, it says 'Agent Page SchoolCensus 2013\_Autumn'. Below this is a 'MY SOURCES' section with a 'Filter By:' dropdown menu. A 'Performance summary' table is displayed, showing counts for Expected, Outstanding, Submitted, Approved, and Authorised returns, along with a breakdown of Errors (E, Q, OK). Below the summary is a table of 'Sources' with columns for Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The first row, 'Abbey College, Ramsey', is highlighted. At the bottom of the page, there are several buttons: 'Open Return...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', 'Export All...', 'Upload Return for selected Sources', 'Validate Selected Return...', 'Validate All Non-validated Returns...', 'Launch Reports...', 'Queue Management...', 'Change Queue...', 'Move to this queue ->', and 'Academy Export...'. The 'Approve...' and 'Approve All...' buttons are circled in red.

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	2	0	0	6	22	0

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Submitted	23/08/2013			Academies	4	6	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

- 2) Once selected, approve the return by clicking the **Approve** (Approve the highlighted single return) or **Approve All** (Approves all returns at Submitted stage) button.

Screen information will be updated:

Performance summary									
Expected	Outstanding	Submitted	Approved	Authorised	Errors				
3214	3212	1	1	0	E	Q	OK		
					6	22	0		

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Approved	23/08/2013	23/08/2013		Academies	4	6	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

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2 3 4 5 6 7 8 9 10 ...

Academies

- The status of the return will be set to 'Approved' and the 'Date Approved' will be completed
- The 'Approved' total in the performance summary will increase by 1 and the 'Submitted' count will decrease by 1
- The **Approve** button will now be disabled for this return
- The **Unapprove** button will now be enabled.

# Queues

When a number of people are working on Census files, the use of the 'Queue' facility can help effective working.

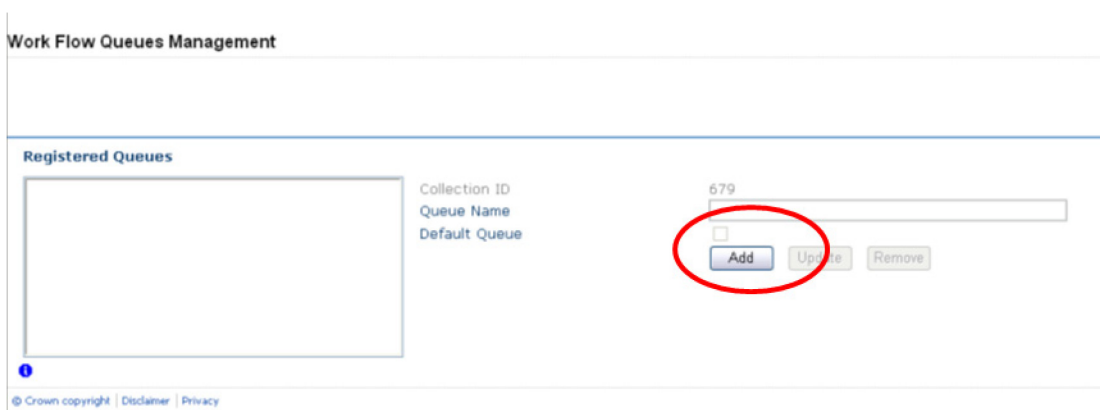
The use of 'Queues' helps in the allocation and identification of who is working on which files and therefore helps to ensure that two or more people don't try and work on the same file.

- 1) From the **Agent** page click the **Queue Management** button.



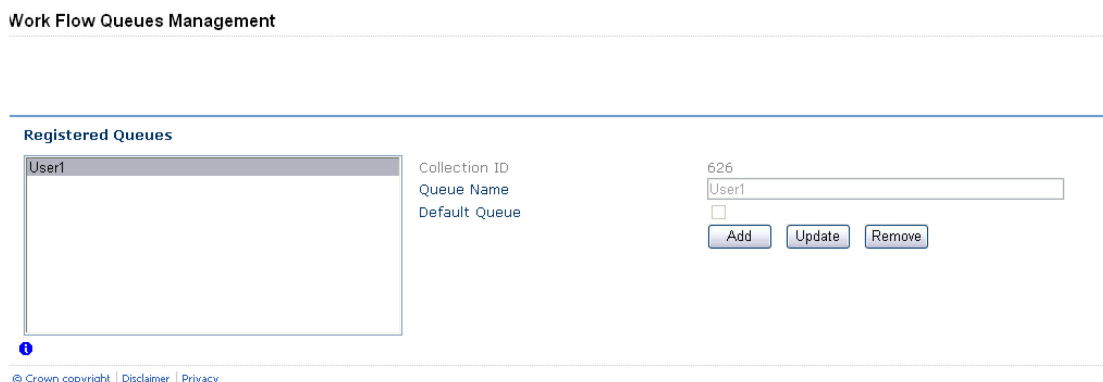
This will take you to the page entitled 'Work Flow Queues Management'

- 2) To add a name, click the **Add** button.



- 3) Type your name (or the name of a colleague) into the 'Queue Name' box then click **OK**. (Instead of a name you may wish to apportion schools by a day of week or by some other description depending on your LA's validation procedures).

The name/description will now be displayed in alphabetical order in the 'Registered Queues' box.



Use the **Update** button to modify a selected name/description.

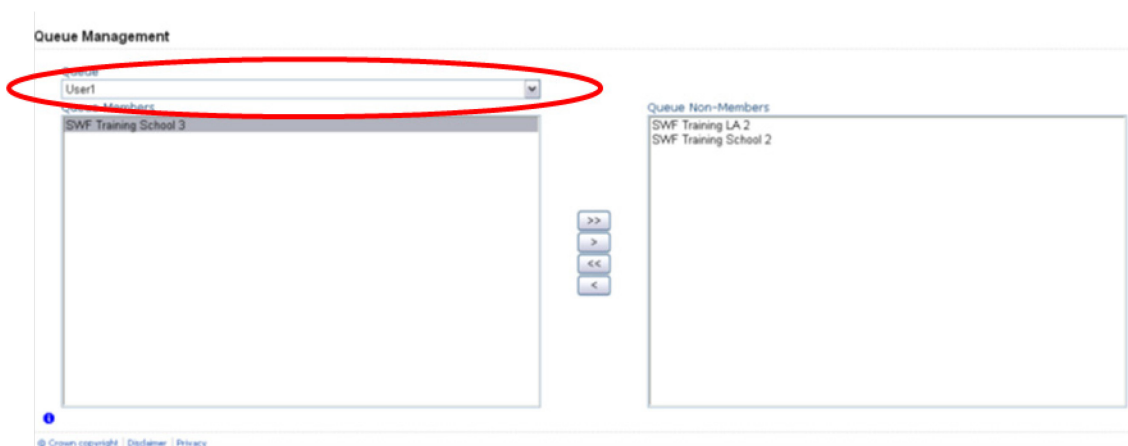
The **Remove** button allows you to remove a name/description from the 'Registered Queues' list. However, this can only be done if any schools linked with a particular name are removed first.

*NB: The check-box used to set the 'Default Queue' was originally intended to allow a default queue to be allocated for a workflow stage; however the emerging requirement for the use of queues is for LAs to assign their own, as they work in different ways. It is therefore not applicable and has no effect on Queues.*

Return to the **Agent page** by selecting **Back to My Collect page** at the top of the page and click the **Change Queue** button to go to the screen entitled 'Queue Management'

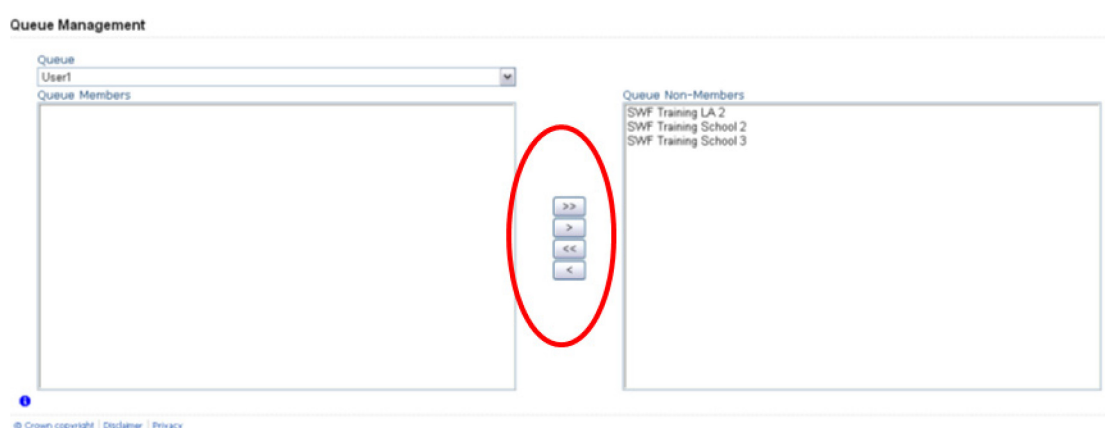


- 4) You can now select and add or remove schools to and from different Queues (click the right hand down arrow alongside the 'Queue' box to see a drop down list of names).



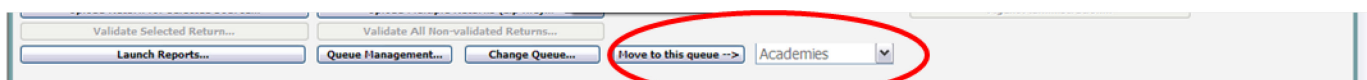
- 5) Highlight a school in the 'Queue Non-Members' box and press the < button. This school will now appear in the box of 'Queue Members'.

< or > will move individual schools or a group of schools selected in the direction of arrow. << or >> will move **all** schools in direction of arrows (although you will first be prompted to confirm this global move).



Return to the **Agent page** by selecting **Back to My Collect page** at the top of the page and you will see that selected school has now been assigned to the selected queue.

\* An alternative way to attach a school to a particular person is to highlight the school (under 'Source Name') then click the **Move to this Queue** button. (This can be a safer way to allocate schools to queues because you can see if any schools are already allocated to another queue first).



# Reports

1) A number of reports are available on COLLECT, return to the **Agent page** and click on the **Launch Reports** button.

Agent Page SchoolCensus 2013\_Autumn

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
3214	3212	1	1	0	6	22	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
8734603	Abbey College, Ramsey	Approved	23/08/2013	23/08/2013		Academies	4	6	0
3835400	Abbey Grange Church of England Academy	No_Data				Academies	0	0	0
8412666	Abbey Infants' School	No_Data				Academies	0	0	0
8412647	Abbey Junior School	No_Data				Academies	0	0	0
9284007	Abbeyfield School	No_Data				Academies	0	0	0
8034000	Abbeywood Community School	No_Data				Academies	0	0	0
8833822	Abbots Hall Primary School	No_Data				Academies	0	0	0
3115401	Abbs Cross School and Arts College	No_Data				Academies	0	0	0
8555403	Abington High School	No_Data				Academies	0	0	0
9282177	Abington Vale Primary School	No_Data				Academies	0	0	0

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2 3 4 5 6 7 8 9 10 ...

Academies

- 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.

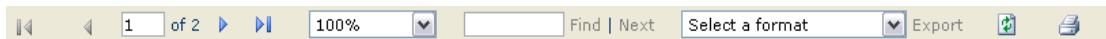
**In Spring and Autumn School Census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your LA/Schools as each pupil is funded only once.**

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

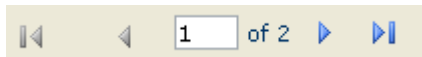
## School Census 2014

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

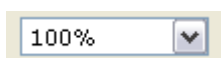
Along the top of the report you will see a toolbar with various functions.



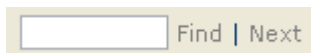
These are explained as follows.



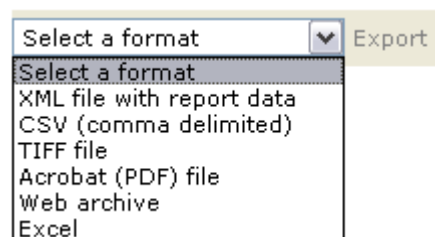
Allows you to navigate between pages of the report.



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.

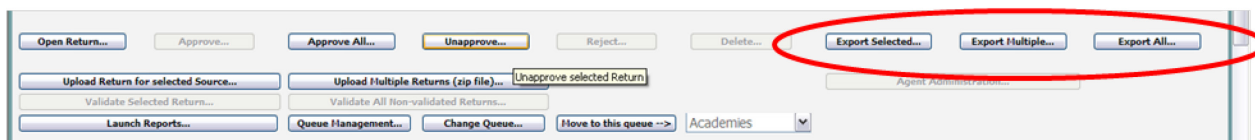
## Exporting a return

A return can be exported in xml or csv format

### Exporting a return (Current state)

On the **Agent** page there are three export options.

- 1 Export selected – One school
- 2 Export Multiple – Up to 10 schools
- 3 Export All – All schools

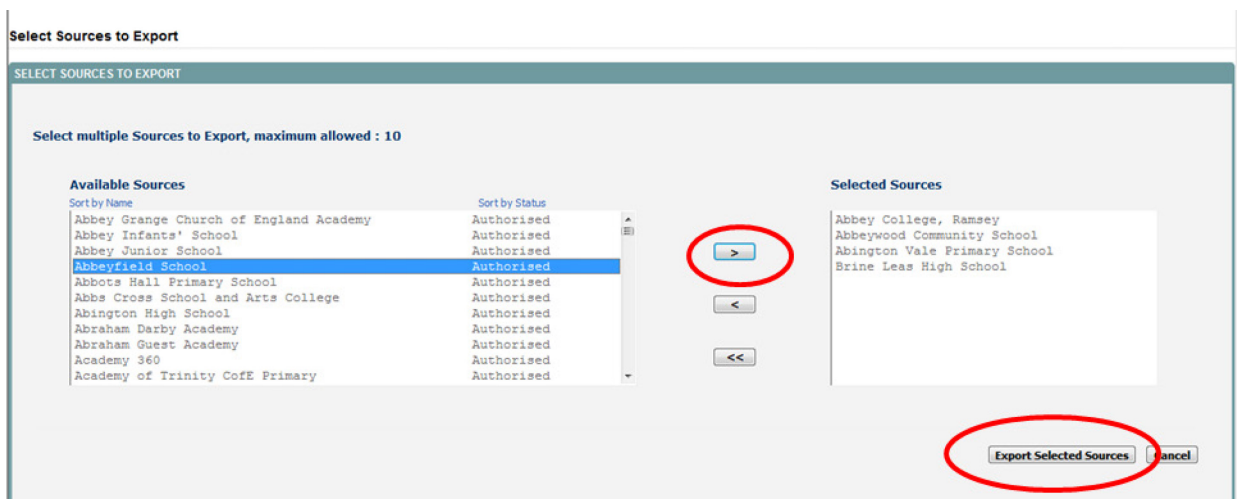


### Export Selected

- 1) Click on the school you wish to export – highlighting it
- 2) Click on Export Selected button

### Export Multiple

- 1) Click on Export Multiple button
- 2) Select schools you wish to export by moving over to the right hand box
- 3) Click Export selected sources



## Export All

- 1) Click on Export all

## Academy Export

Local Authorities have a function within COLLECT to export all 'Authorised' academy data. The export contains a sub-set of data agreed by the Academies Team, anything not contained within the export the DfE are unable to share.

- 1) Click on Academy Export



## Selecting format

Once you have clicked one of the three options above and followed any instructions the following screen will be displayed.

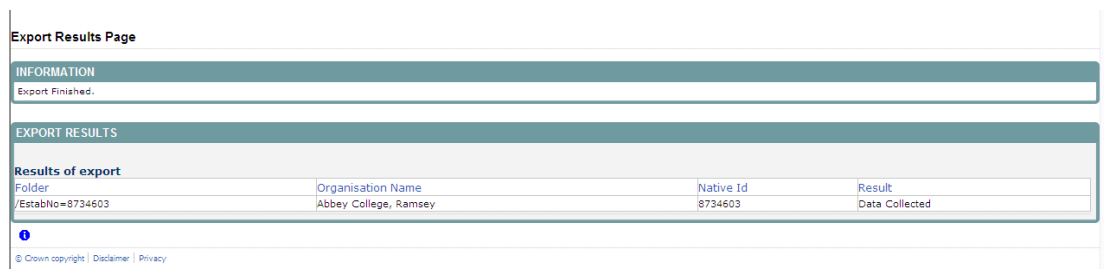
- 1) Choose to export in either XML or CSV format, then click on the **Export** button.

A screenshot of the 'CHOOSE EXPORT FORMAT' dialog box. It has a title bar 'CHOOSE EXPORT FORMAT'. The main content area says 'Export the current data for the selected Source' and 'Please select the format that you wish to export this data:'. There are two radio buttons: 'Export as XML' (selected) and 'Export as CSV'. Below this, it says 'Please Select the Status that you wish to export this data: Either:'. There are two sections: 'All' with a checked checkbox, and 'Or one or more of the following' with a list of status options: 'Loaded', 'Amended by source', 'Submitted', 'Amended by agent', 'Approved', 'Amended by collector', and 'Authorised', each with an unchecked checkbox. At the bottom, there is a blue 'Export' button with a right-pointing arrow, which is circled in red.

- 2) A progress message will be displayed



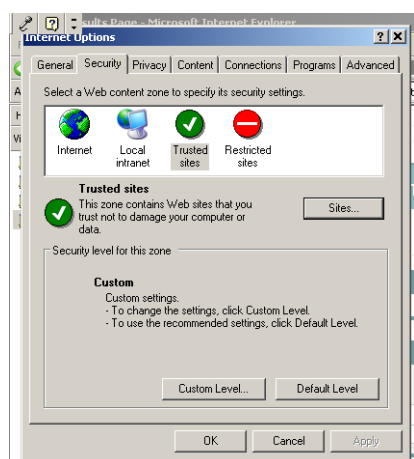
- 3) When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



**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 dialogue box should appear.

## Screen Functionality

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

### Screen Navigation

**Don't use the browser buttons!** When in the data collection, unpredictable behaviour may be experienced if you use the back/forward buttons on your web browser's toolbar.



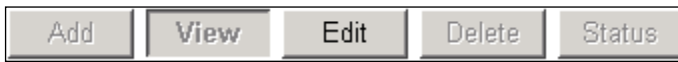
### Navigation controls

To navigate through the system links are provided on all pages either as **Back** or **Drill Up** options, please use these links to navigate between screens when using the system.

Control	Usually located	Action
Back to My Collect page	All screens within a return except the main page which shows Back to Home page	Returns you to the main page for your user role (Agent, Source etc)
Drill Up	Any data screen within a return apart from the header screen	Returns you to the previous data screen
Return	Report screens, e.g. History and errors	Returns you to the previous screen
Back	Notes screens	Returns you to the previous screen
View All	Data entry screens that have additional linked data.	Takes you to the sub module level details

## Mode Buttons

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



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

Black Text on button and highlighted border = Available Mode

Light Grey text on button with light border = Unavailable Mode

## Help

If you do not already have access to COLLECT for School Census you will need to complete the [Collect LA Access form](#).

If you have any queries regarding School Census or have a change to your contact details please could you complete [Service Request form](#).



Department  
for Education

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