School census 2014 to 2015

Editing data within COLLECT

October 2014

Contents

Editing Data

From the 2013 Autumn School Census onwards, the 'edit' facility in COLLECT will be made available for all COLLECT users. This includes **ALL** schools regardless of type – previously the 'edit' functionality was only available to COLLECT users with a role of agent (i.e. LAs) or collector (i.e. DfE).

Directly editing data in COLLECT can sometimes be more appropriate than re-loading a complete new submission, especially when the required amendments are small (e.g. amending a pupil's enrolment status). **However any changes made within COLLECT should always reflect the data within school systems** – i.e. if a change is made to a data item within COLLECT then the same change should also be made to the data within the school MIS. This is important from an audit/inspection viewpoint and will avoid schools manually having to make the same changes every census.

Local Authority maintained schools should consult with their local authority regarding editing of data within COLLECT to agree local responsibilities and/or processes for amending data directly in COLLECT. Audit reports will be available to both schools and LAs in COLLECT to provide an audit trail of any data amendments.

Please note: Not all School Census fields are editable. Anything that you cannot change on COLLECT will need updating in the MIS and the file re-running.

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

COLLECT 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.

Accessing the return

1) Access COLLECT and the data collection in the usual way and click 'Open Return'.
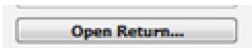
The return will then be displayed

2) Choose which section of the return you wish to edit using the 'View All' buttons.

Editing the return level screen

The first screen you see will be the return level screen.

1) To edit click on the 'Edit' button to the top of the screen:

Clicking 'Edit' changes the mode, the screen will refresh and you will now see the fields you are able to edit change to contain black text.

2) Overtype anything you wish to change and click on 'View' to save the change.

You will see a scroll icon has appeared in the history column – this denotes that a change has been made on the return.

Double clicking on the scroll will show the change that has been made, when and by which username

Editing the School Details

1) Use the 'View All' Buttons to navigate to the School section

School	View All
Pupils on Roll	View All
Pupils No Longer on Roll	View All

2) You will be presented with the school details. Click on 'Edit'

3) Overtype the data or use the dropdown options to select updated data and click 'View' to save.

Editing a Pupil Record

1) Use the 'View All' buttons to navigate to the 'Pupil on Roll' or 'Pupil no Longer on Roll' section of the return

2) You will be presented with a list of pupils; you can use the filter bar to search for a particular child using UPN, Surname or Date of Birth.

3) Once you have the correct pupil record shown you need to select which area of the return you wish to edit by clicking on either the headers.

Once you have navigated to the correct area of the pupil record please click 'Edit'.

4) Overtype or use drop down menus to update the information and click 'View' to save.

Popular Changes

This section shows the most frequent changes made to a return within COLLECT.

Changing a UPN

1) To make the fields in the return open for editing click on the 'Edit' button displayed in the top right hand corner of the screen

2) You will need to overtype the UPN with the updated one. Once done click 'View' to save the change

3) You can tell that a change has been made by displaying a scroll in the history column of the return.

4) Double clicking on the scroll will show the change that has been made, when and by which username

Off rolling a pupil

1) Locate the pupil in the same way as above through the pupils on roll 'View All' and filter bar.
2) Once found the correct pupil click on the edit button

3) You will see a drop down box becomes available at the bottom of the screen, to transfer the pupil off roll change this to 'True'

The record will update overnight and the pupil will show in off roll the next working day.
You need to then find the pupil in the 'Pupil no Longer on Roll' section & add their leaving date.

Adding a missing address

1) Locate the pupil in the same way as above through the pupils on roll 'View All' and filter bar.
2) Click on the Pupil on roll Addresses 'View All' Link.

3) Click 'Add' to bring up fields to enter in missing address details

4) Once all address details entered click on 'Save'

5) This will now save the address and clear any 2355Q query.

Changes to data in Pupil records

E.g. Language, DOB, Enrol Status
You can change any information about the pupil in the same way as changing UPN.

You need to locate the part of the return with the incorrect information and then click 'edit' to change it, either by overwriting or using a drop down menu of options.

Deleting a pupil from the return

Sometimes you may need to completely remove a pupil from the return if they have pulled through in error.

The most common occurrence of this is off roll pupils under 4 where we do not collect attendance/exclusion/post 16 data. You will see errors 1925 or 1926 in this case.

On checking the records if you are <u>confident</u> this is the case and the pupil needs removing please follow these steps.

1) Locate the pupil on the return please use the UPN search where possible to ensure the correct pupil is selected.

2) Double check you have the correct pupil highlighted in blue and the text is in bold and click the 'Delete' button.

You then need to confirm this action or cancel if done in error.

Please note – Unlike a change to the return deleting a pupil is irreversible without a re-load of data. Please ensure you have highlighted the correct child before removing.

Removing a duplicate record

The DfE will run extra checks on your data prior to authorising such as looking at duplicate records i.e. FSM periods or Exclusions. We will contact you regarding these and ask that you update COLLECT to only show one. Using duplicate exclusions as an example please follow the following steps.

1) Locate the pupil using the 'View All' buttons and filter bar. Once correct pupil highlighted, click on Pupil on Roll Termly Exclusions 'View All'

2) You will see the exclusions listed here. Please highlight the one you wish to remove by clicking on it and then click the delete button.

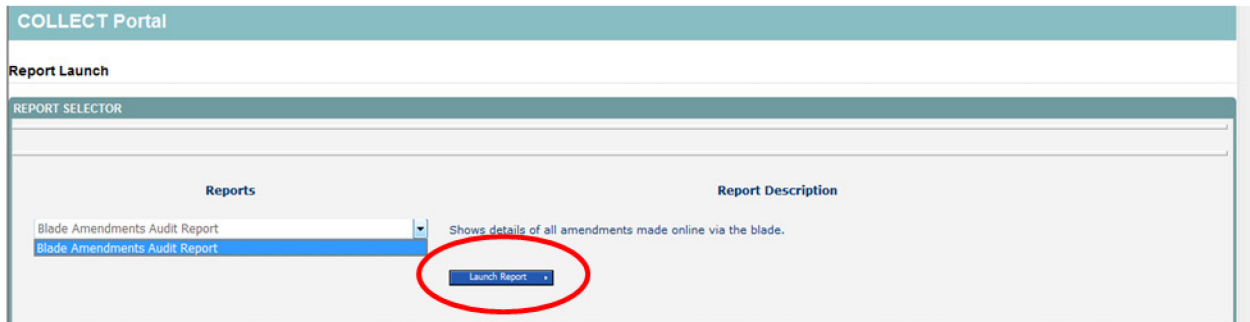3) You then need to confirm this action by clicking 'Yes'

Reports

A new report has been added to COLLECT which will detail the change history of a school. This report is available to all schools and Local Authority users.

1) Click on the Launch Reports button

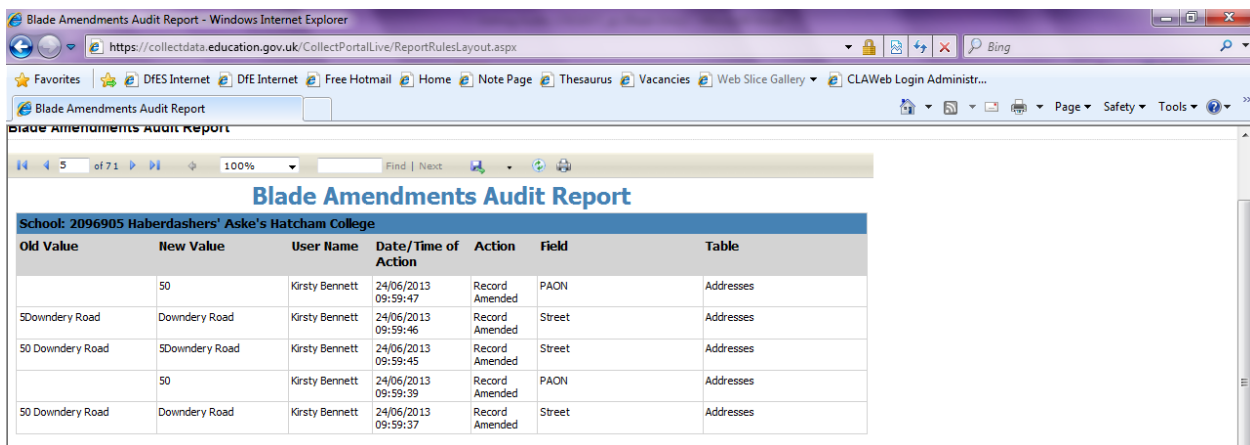2) Select Blade Amendments Report from the drop down & click 'Launch Reports'

3) Click on Launch Report again on the next page to confirm

4) Your report will be displayed detailing any change that has been made to the collection.

LAs - You will see a full list of schools where changes have been made.

Please follow the COLLECT user guide to see how to export or print this report.

Help

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

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