



Department  
for Education

# **School census 2015**

## **COLLECT guide for maintained schools**

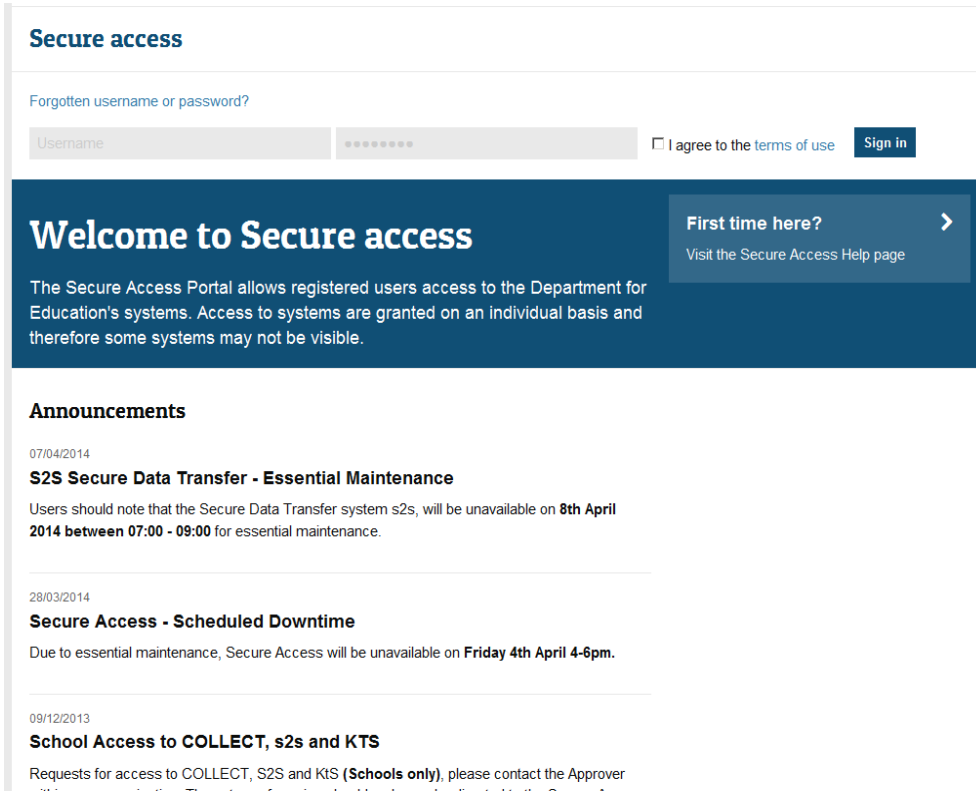
**January 2015**

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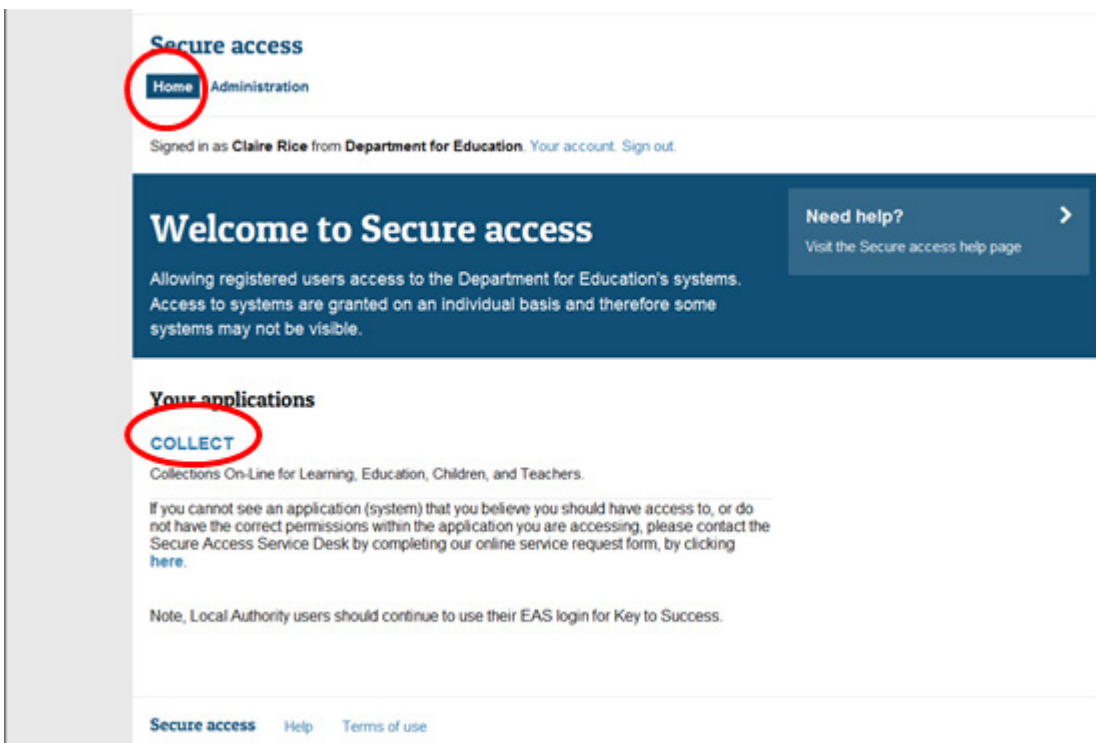
# COLLECT and secure access

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



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

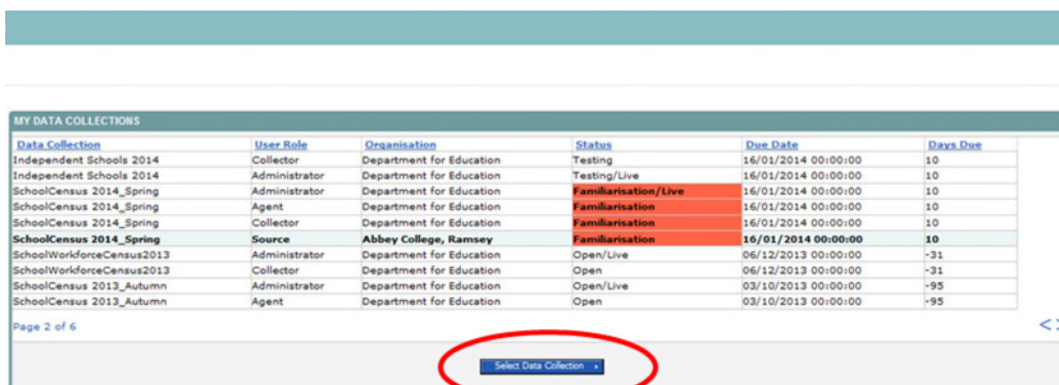
Once successfully registered, click on to 'Home' and then click on 'COLLECT' to enter COLLECT as below.



To proceed into COLLECT please click on the 'Continue' button as below.



\*Please note: some screen shots refer to 2013 however the process is the same for all 2015 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.

# 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?**

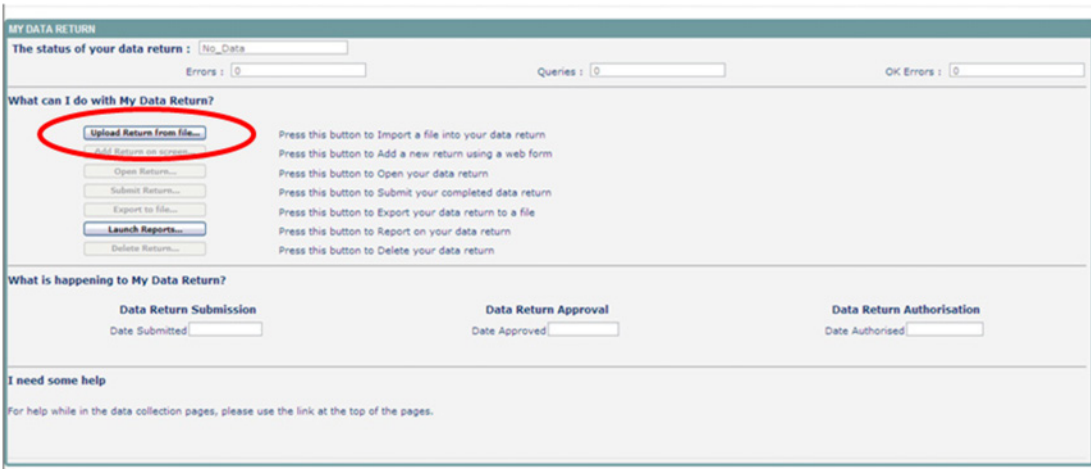
<b>Data Return Submission</b> Date Submitted <input type="text"/>	<b>Data Return Approval</b> Date Approved <input type="text"/>	<b>Data Return Authorisation</b> Date Authorised <input type="text"/>
----------------------------------------------------------------------	-------------------------------------------------------------------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

**I need some help**

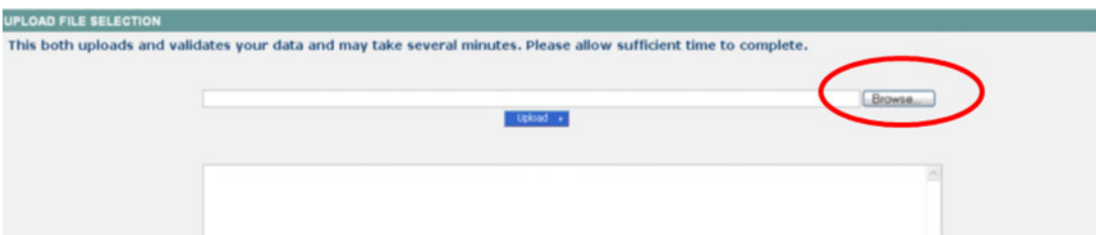
For help while in the data collection pages, please use the link at the top of the pages.

# Loading a Return

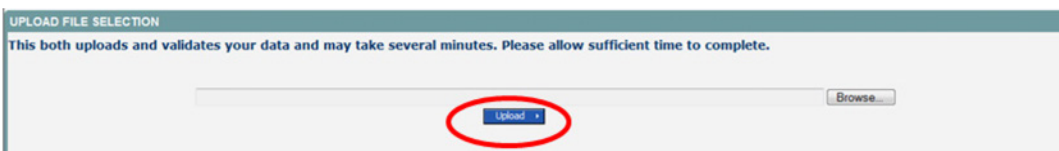
1) Click on **Upload return from file**



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

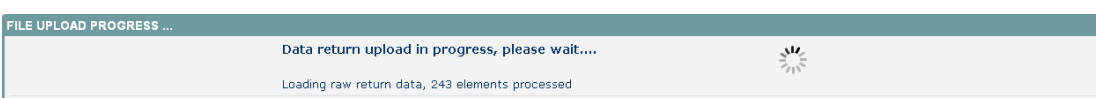


3) Click on the **Upload** button to load the return.

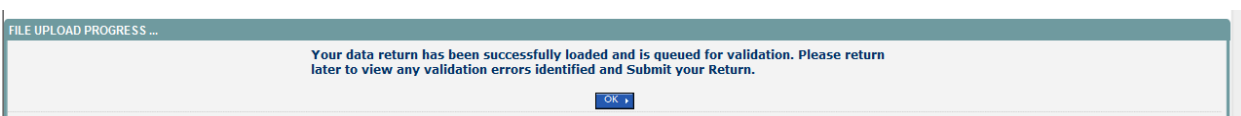


A progress message may be displayed while the upload is taking place.

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.*

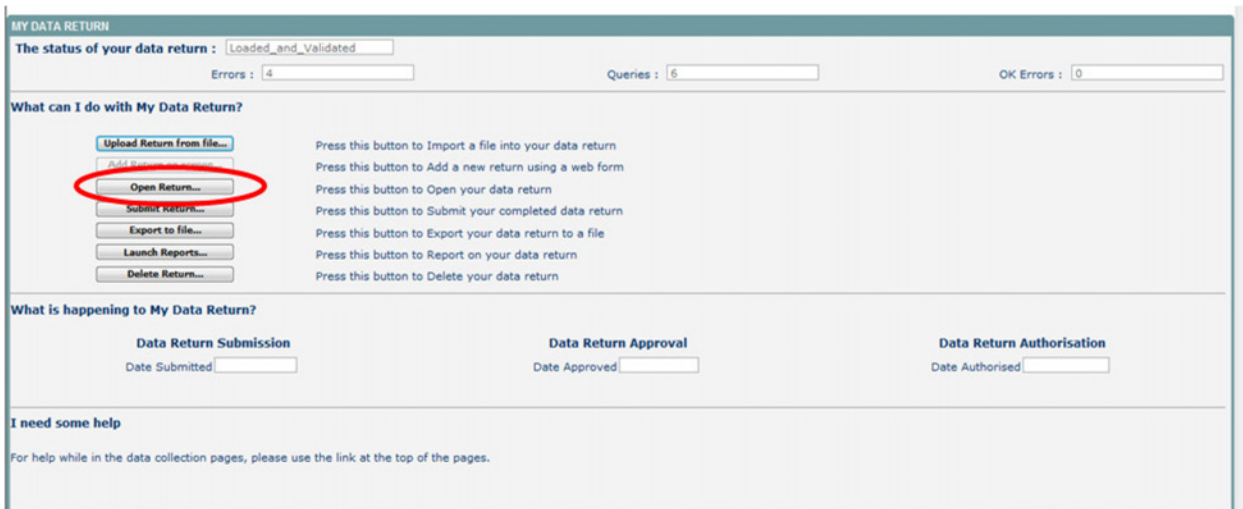
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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.

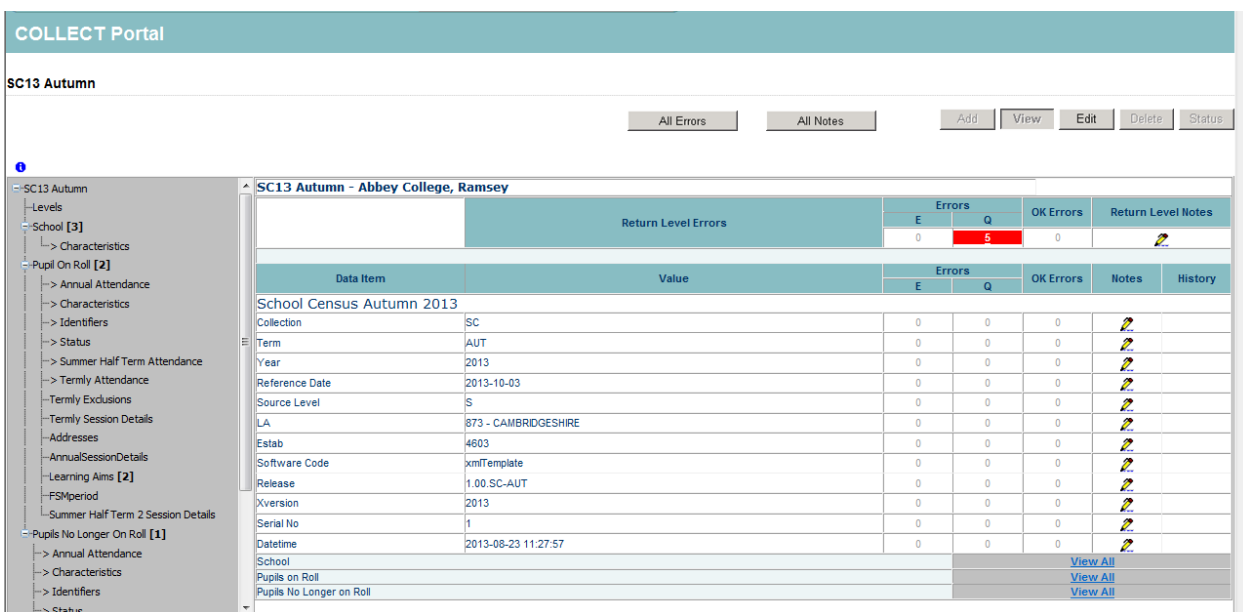
The screenshot shows the 'COLLECT Portal' interface. The main heading is 'Source Page SchoolCensus 2013\_Autumn'. Below this is the 'MY DATA RETURN' section. A red oval highlights the following information: 'The status of your data return : Loaded\_and\_Validated', 'Errors : 4', 'Queries : 6', and 'OK 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 Returns 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). A final section 'I need some help' provides a link for assistance.

# 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.

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

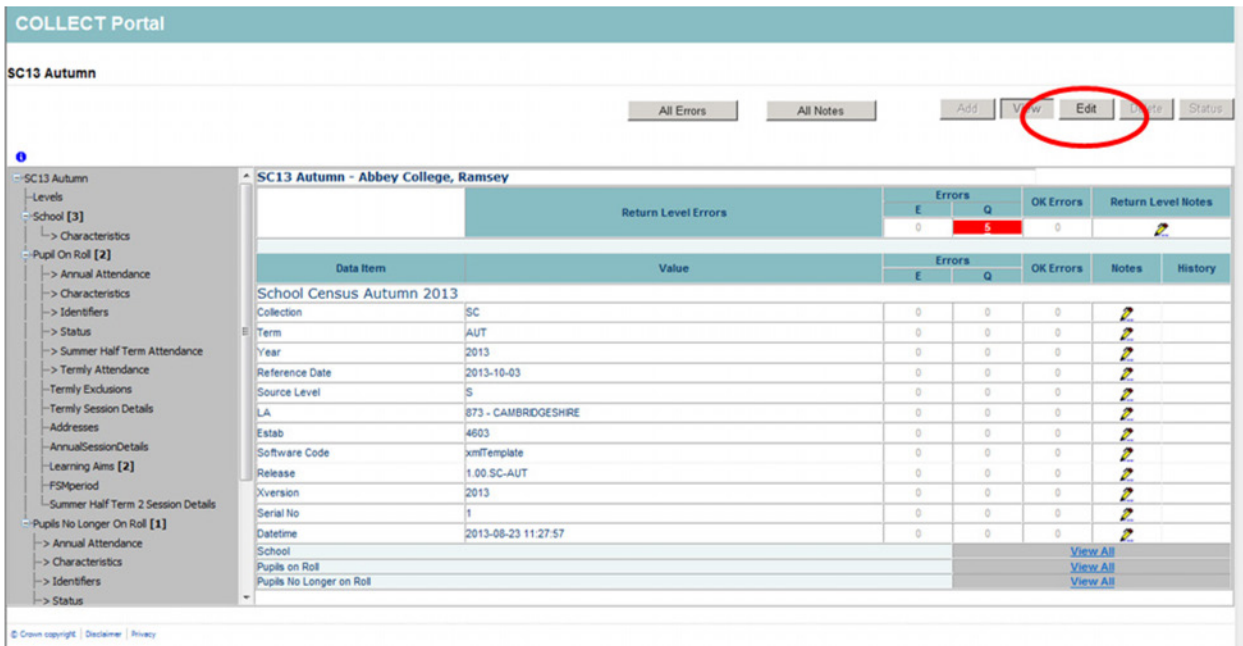


## New: Editing data within the return

The default view when a screen is displayed is 'View' mode. We have enabled editing at school level for all school census returns.

**Please consult with your Local Authority regarding editing of your return to agree local responsibilities and/or processes for amending data directly in COLLECT.**

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



The screenshot shows the COLLECT Portal interface for 'SC13 Autumn' at 'Abbey College, Ramsey'. The 'Edit' button is circled in red. The main content area displays a table of 'Return Level Errors' and a detailed view of 'School Census Autumn 2013' data items.

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						<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.

COLLECT Portal

Source Page SchoolCensus 2013\_Autumn

MY DATA RETURN

The status of your data return :

Errors :       Queries :       OK Errors :

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?

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

I need some help

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

## 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 the table, there are columns for '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			Governance	CA - Academies
2720		Qualification Accreditation Number is not a recognised value	Errors			Intake	COUP - Comprehensive
2724		Discount Code is not a recognised value	Queries			Phase	SS - Secondary (including CTCs and Academies)
1510		UPN invalid (wrong check letter at character 1)	Errors			UPN	H873547854112
1510		UPN invalid (wrong check letter at character 1)	Errors				
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) **If your LA agrees** - 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

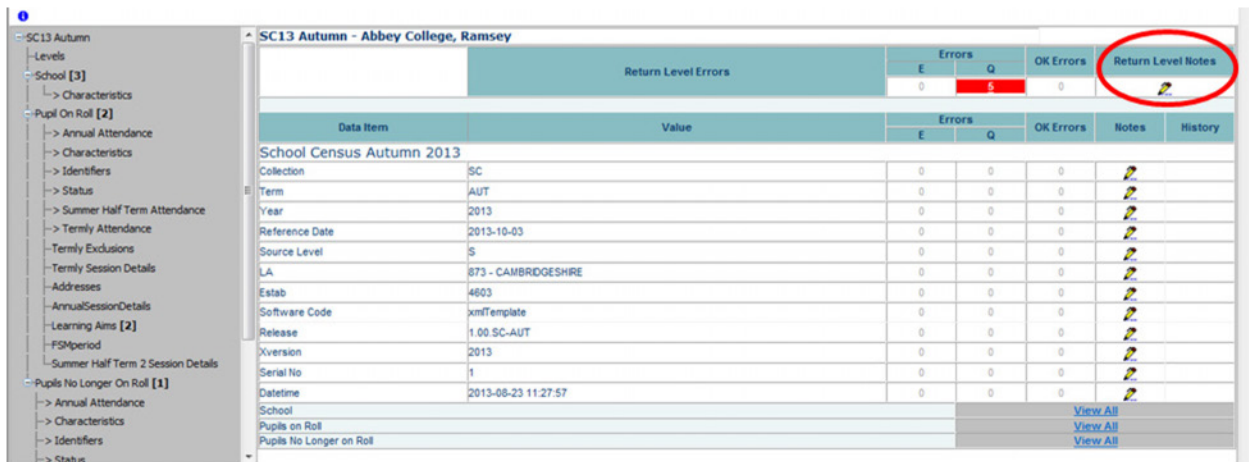
In some instances you will be requested to provide explanatory information (as part of email communications you will receive a document which will provide guidance on what notepad explanation would be expected for individual queries. This will also be made available on our web page [School Census 2015](#) ) 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.



The screenshot shows the 'SC13 Autumn - Abbey College, Ramsey' interface. The 'Return Level Errors' section is visible, with a table showing 'Data Item' and 'Value'. The 'Return Level Notes' button is circled in red.

Data Item	Value	Errors			OK Errors	Notes	History
		E	Q				
Collection	SC	0	0	0	0		
Term	AUT	0	0	0	0		
Year	2013	0	0	0	0		
Reference Date	2013-10-03	0	0	0	0		
Source Level	S	0	0	0	0		
LA	873 - CAMBRIDGESHIRE	0	0	0	0		
Estab	4803	0	0	0	0		
Software Code	xmlTemplate	0	0	0	0		
Release	1.00 SC-AUT	0	0	0	0		
Xversion	2013	0	0	0	0		
Serial No	1	0	0	0	0		
Datetime	2013-08-23 11:27:57	0	0	0	0		

- 2) Click add new note



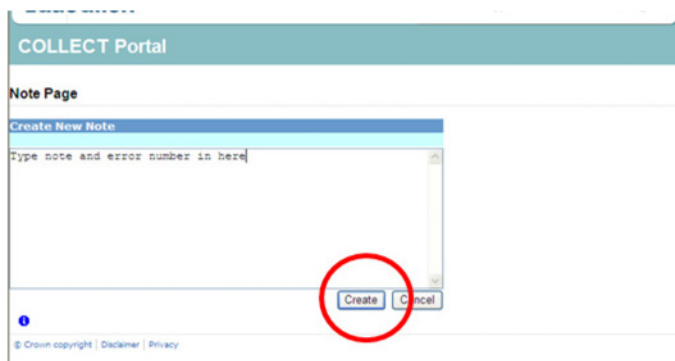
The screenshot shows the 'Note Detail' form. The 'Add New Note' button is circled in red.

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.



**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'.

COLLECT Portal

Source Page SchoolCensus 2013\_Autumn

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 Returns on screen..."/>	Press this button to Add a new return using a web form
<input type="button" value="Open Returns..."/>	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?

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

I need some help

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

The screen 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

COLLECT Portal

Source Page SchoolCensus 2013\_Autumn

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 Returns on screen..."/>	Press this button to Add a new return using a web form
<input type="button" value="Open Returns..."/>	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?

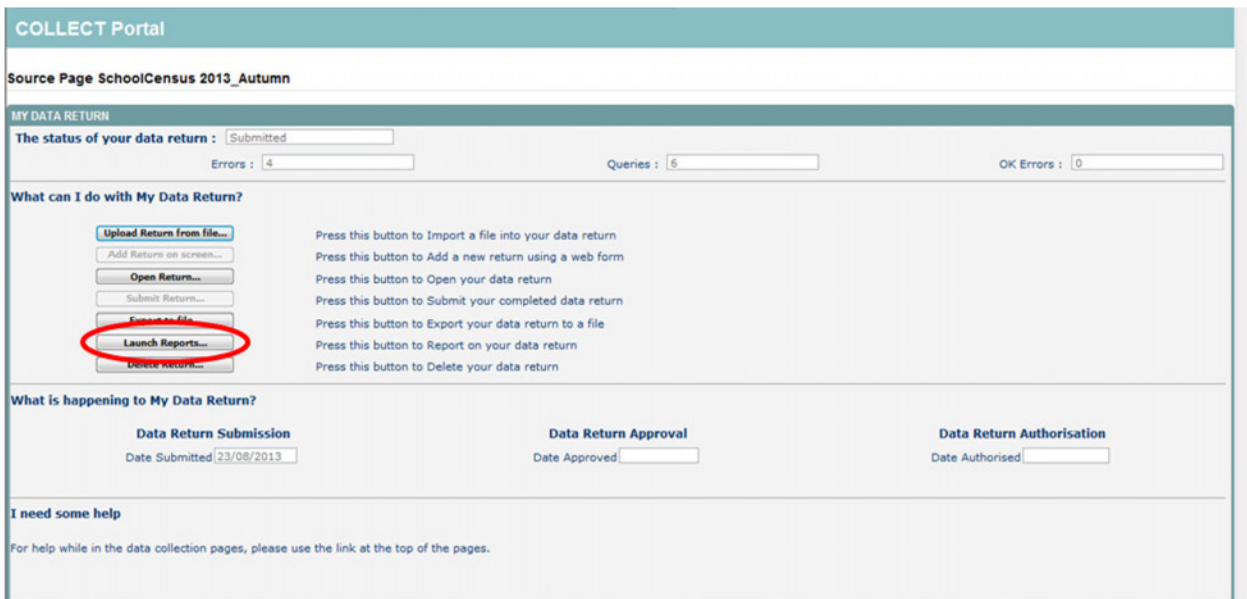
<b>Data Return Submission</b> Date Submitted: <input type="text" value="23/08/2013"/>	<b>Data Return Approval</b> Date Approved: <input type="text"/>	<b>Data Return Authorisation</b> Date Authorised: <input type="text"/>
------------------------------------------------------------------------------------------	--------------------------------------------------------------------	---------------------------------------------------------------------------

I need some help

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

# Reports

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



1. A drop down menu will be display and a report can be selected from that drop down list

**Your Local Authority will usually run these reports and consult you on any queries they bring up.**

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

## [School Census 2015](#)

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

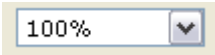
Along the top of the report you will see a toolbar with various functions.



These are explained as follows.



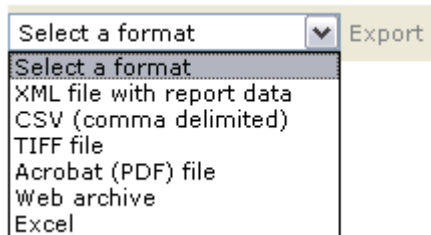
Allows you to navigate between pages of the report.



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.



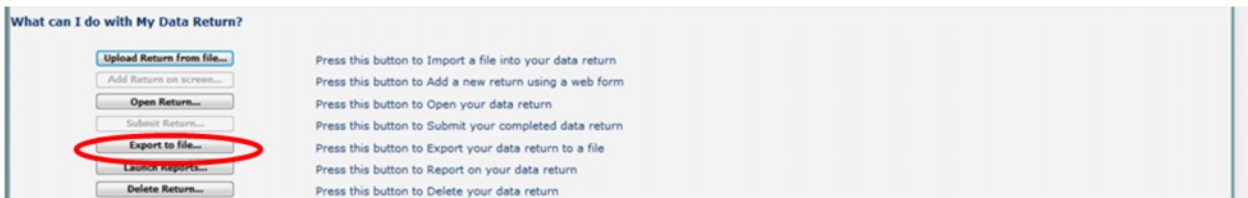
# Exporting a return

A return can be exported in xml or csv format

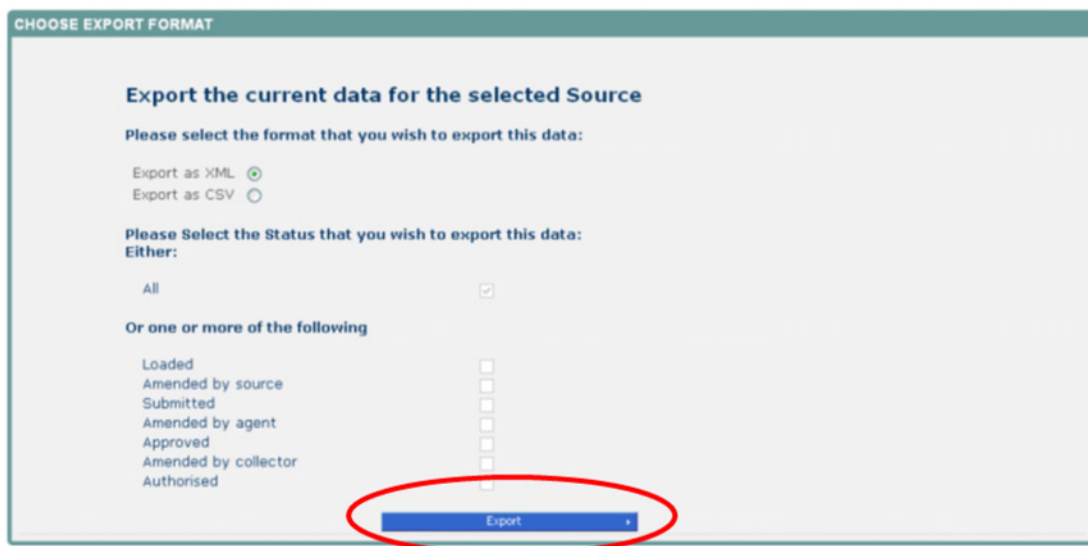
## Exporting a return (Current state)

On the **Source** page

- 1) Click on Export to file

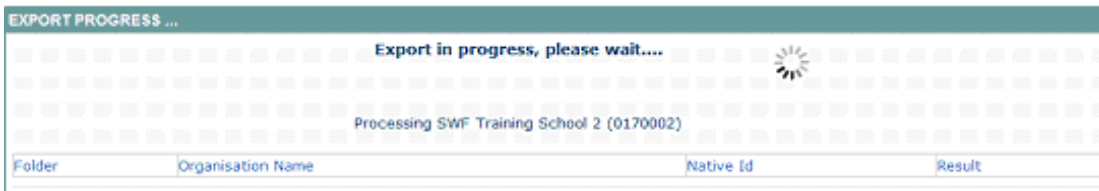


- 2) Choose to export in either XML or CSV format, then click on the **Export** button.



- 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.

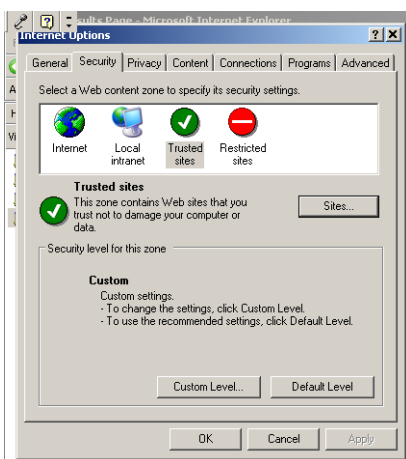
Export Results Page			
INFORMATION			
Export Finished.			
EXPORT RESULTS			
Results of export			
Folder	Organisation Name	Native Id	Result
/EstabNo=8734603	Abbey College, Ramsey	8734603	Data Collected

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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.



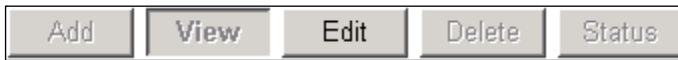
### Navigation controls

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 in the first instance please contact your Local Authority.



Department  
for Education

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email [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk)

write to Information Policy Team, The National Archives, Kew, London, TW9 4DU

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

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