



Department
for Education

School census 2015

COLLECT guide for local authorities

May 2015

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COLLECT and secure access

Access to COLLECT is through the department's secure access system (SA)

The screenshot shows the login interface for the Department for Education's Secure Access system. At the top left, there is a logo and the text 'Department for Education'. Below this is a header section titled 'Secure access'. Underneath the header, there is a link for 'Forgotten username or password?'. The main login area contains two input fields: 'Username' and 'Password'. To the right of these fields is a checkbox labeled 'I agree to the terms of use' and a 'Sign in' button. Below the login fields is a large blue banner with the text 'Welcome to Secure access'. To the right of this banner is a button labeled 'First time here?' with a right-pointing arrow and the text 'Visit the Secure Access Help page'. Below the banner is an 'Announcements' section with a date '27/03/2015' and a heading 's2s system potential downtime'. The announcement text states: 'Due to some essential maintenance the s2s system may be unavailable between 4pm and 5pm on Tuesday 31st March 2015. The system will be unavailable at this time - the DfE apologises for the inconvenience.'

Full secure access guides are published on the [secure access website](#).

Once secure access has been successful, click on to '**Home**' and then click on '**COLLECT**' to enter COLLECT as below

Welcome to Secure access

Allowing 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.

Need help?
Visit the Secure access help page

Your applications

COLLECT

Collections On-Line for Learning, Education, Children, and Teachers.

If you cannot see an application (system) that you believe you should have access to, or do not have the correct permissions within the application you are accessing, please contact the Secure Access Service Desk by completing our online service request form, by clicking [here](#).

Note, Local Authority users should continue to use their EAS login for Key to Success.

[Secure access](#) [Help](#) [Terms of use](#)

Then click on to **'Continue'** to enter COLLECT as below.

COLLECT Portal

Collect Welcome

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

PROCEED INTO COLLECT
Continue...

[Show Code of Conduct Text...](#)

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
SchoolCensus 2015_Summer	Agent	Department for Education	Familiarisation	17/06/2015 00:00:00	48
SchoolCensus 2015_Summer	Collector	Department for Education	Familiarisation	17/06/2015 00:00:00	48
SchoolCensus 2015_Summer	Administrator	Department for Education	Familiarisation/Live	17/06/2015 00:00:00	48
SchoolCensus 2015_Spring	Administrator	Department for Education	Open/Live	15/01/2015 00:00:00	-105
SchoolCensus 2015_Spring	Agent	Department for Education	Open	15/01/2015 00:00:00	-105
SchoolCensus 2015_Spring	Collector	Department for Education	Open	15/01/2015 00:00:00	-105
SchoolCensus 2015_Autumn	Administrator	Department for Education	Testing/Live	01/10/2015 00:00:00	154
SchoolCensus 2014_Summer	Agent	Department for Education	Testing	15/05/2014 00:00:00	-350
SchoolCensus 2014_Summer	Collector	Department for Education	Testing	15/05/2014 00:00:00	-350
SchoolCensus 2014_Summer	Administrator	Department for Education	Testing/Live	15/05/2014 00:00:00	-350

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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

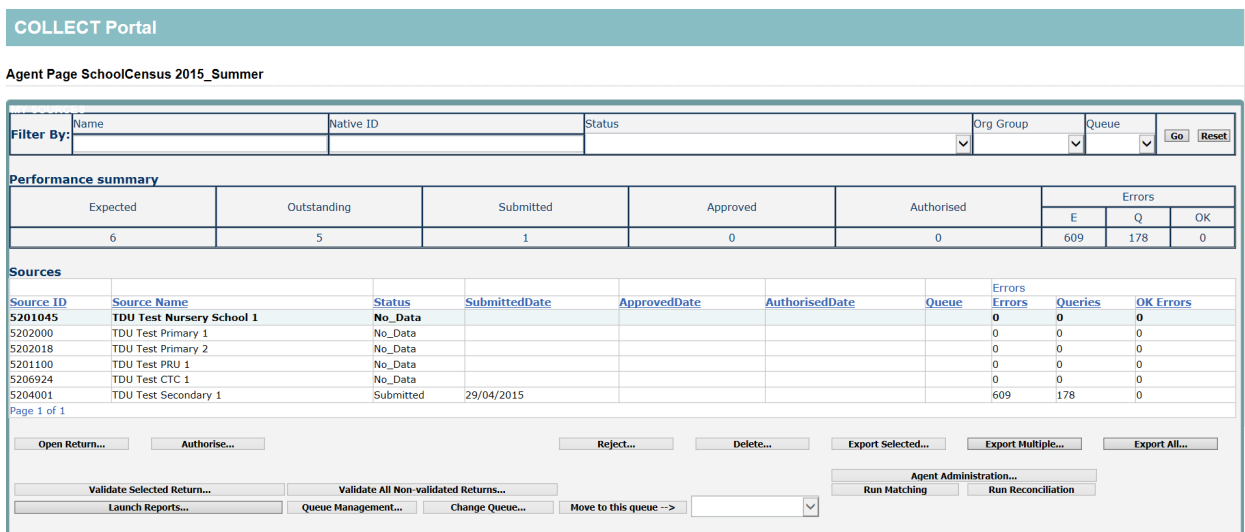
COLLECT Exports

We are aware of a technical issue affecting some users attempting to export files from COLLECT when using Internet Explorer 11 software. This is being urgently investigated by our service partners. Customers experiencing problems can revert to an earlier version of Internet Explorer or use alternative web browser software. We apologise for any inconvenience caused.

Network Issues

Agent page

The agent (local authority) main screen will now be displayed listing all the schools for your local authority.



The agent screen comprises four main sections:

1. Filter by
2. Performance summary
3. Sources
4. Agent functions

Filter by



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 local authority 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

5. The total number of schools that a return is expected from;
6. The total number of schools who have yet to submit their return;
7. The total number of schools who have submitted their return;
8. The total number of school returns approved by the local authority;
9. The total number of school returns authorised by the DfE;
10. 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	Queries	OK Errors
5201045	TDU Test Nursery School 1	No_Data					0	0	0
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5204001	TDU Test Secondary 1	Submitted	29/04/2015				609	178	0

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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 (local authority) 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.

COLLECT Portal

Agent Page SchoolCensus 2015_Summer

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

Performance summary					Errors		
Expected	Outstanding	Submitted	Approved	Authorised	E	Q	OK
6	5	1	0	0	609	178	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5201045	TDU Test Nursery School 1	No_Data					0	0	0
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5204001	TDU Test Secondary 1	Submitted	29/04/2015				609	178	0

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Open Return... Approve... Approve All... Unapprove... Reject... Delete... Export Selected... Export Multiple... Export All... Upload Return for selected Source... Upload Multiple Returns (zip file)... Add Return on screen... Agent Administration... Validate Selected Return... Validate All Non-validated Returns... Launch reports... Queue Management... Change Queue... Move to this queue -->

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.

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

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 local authority 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 2015_Summer

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

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
6	5	1	0	0	609	178	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5201045	TDU Test Nursery School 1	No_Data					0	0	0
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5206024	TDU Test Nursery 1	No_Data					0	0	0
6000001	TDU Test Secondary 1	Submitted	29/04/2015				609	178	0

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Open Return... Approve... Approve All... Unapprove... Reject... Delete... Export Selected... Export Multiple... Export All...

Upload Return for selected Source... Upload Multiple Returns (zip file)... Add Return on screen... Agent Administration...

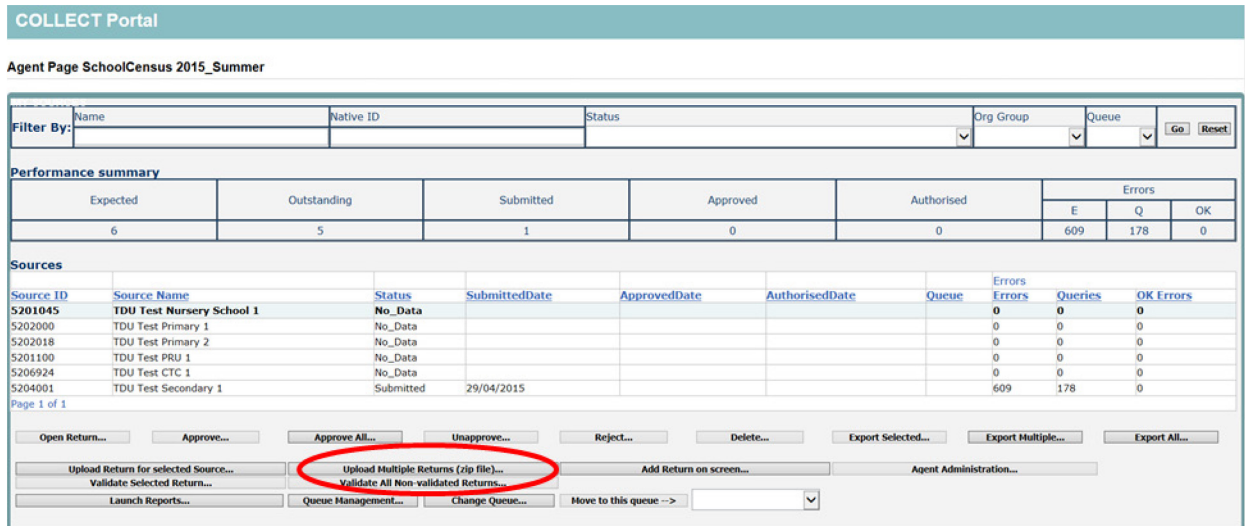
Validate Selected Return... Validate All Non-validated Returns...

Launch Reports... Queue Management... Change Queue... Move to this queue -->

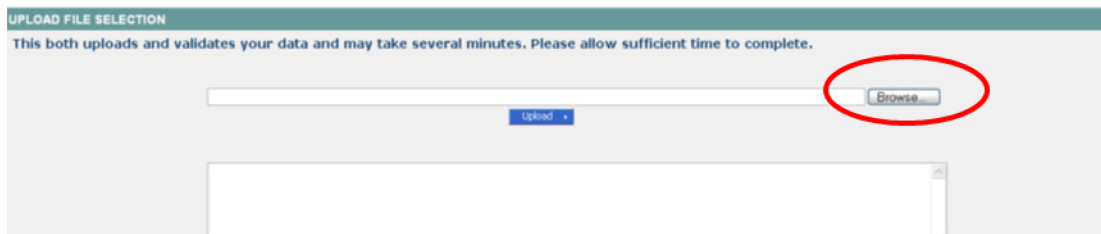
Uploading multiple files

Local authorities 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.

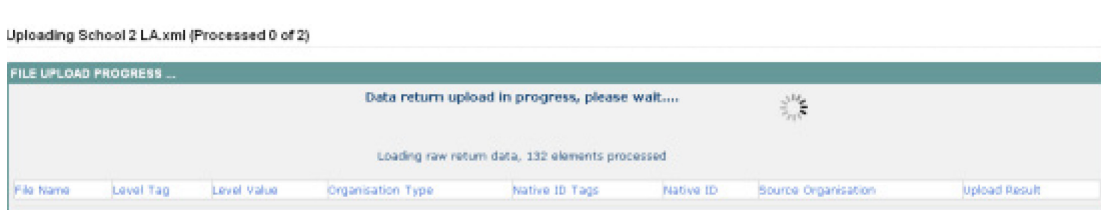
To access the facility, click on the 'Upload Multiple Returns' (zip file) button.



Click on the 'Browse' button to navigate to the zip file in explorer (examplezipfile.zip) that you want to upload.



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.



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 2015_Summer

Filter By: Name Native ID Status Org Group Queue

Performance summary						Errors		
Expected	Outstanding	Submitted	Approved	Authorised	E	Q	OK	
6	5	1	0	0	609	178	0	

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5201045	TDU Test Nursery School 1	No_Data				0	0	0	0
5202000	TDU Test Primary 1	No_Data				0	0	0	0
5202018	TDU Test Primary 2	No_Data				0	0	0	0
5201100	TDU Test PRU 1	No_Data				0	0	0	0
5206924	TDU Test CTC 1	No_Data				0	0	0	0
5204001	TDU Test Secondary 1	Submitted	29/04/2015			609	178	0	0

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

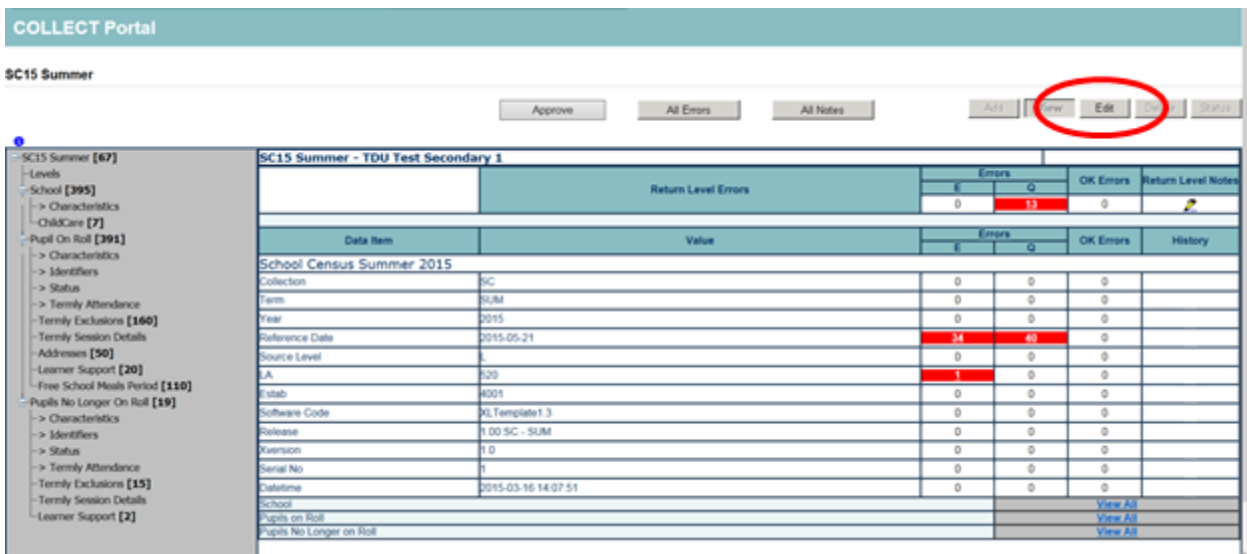
School	View All
Pupils on Roll	View All
Pupils No Longer on Roll	View All

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
V873460314581	TEST	ONE	1999-06-01	C - Current (single registration at this school)	1	0	0	0	0	0

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.



The screenshot shows the COLLECT Portal interface for 'SC15 Summer'. At the top, there are buttons for 'Approve', 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. The 'Edit' button is circled in red. Below the buttons, there is a table titled 'SC15 Summer - TDU Test Secondary 1'. The table has columns for 'Data Item', 'Value', 'Errors' (with sub-columns 'E' and 'Q'), 'OK Errors', and 'History'. The table contains data for 'School Census Summer 2015' with various fields like 'Collection', 'Term', 'Year', 'Reference Date', 'Source Level', 'JA', 'Estab', 'Software Code', 'Release', 'Extension', 'Serial No', and 'Date/Time'. The 'Errors' column shows values for 'E' and 'Q' for each row, with some cells highlighted in red. At the bottom of the table, there are links for 'View All' for 'Pupils on Roll' and 'Pupils No Longer on Roll'.

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. At the top, it says 'COLLECT Portal' and 'Agent Page SchoolCensus 2015_Summer'. Below this is a filter section with fields for Name, Native ID, Status, Org Group, and Queue, along with 'Go' and 'Reset' buttons. A 'Performance summary' table is displayed with columns: Expected (6), Outstanding (5), Submitted (1), Approved (0), Authorised (0), and Errors (E: 609, Q: 178, OK: 0). Below the summary is a 'Sources' table with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The row for 'TDD Test Secondary 1' (Source ID 5204001) is highlighted, and its 'Errors' (609) and 'Queries' (178) values are circled in red. At the bottom, there are various action buttons like 'Open Returns...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. There are also buttons for 'Upload Returns for selected Source...', 'Upload Multiple Returns (zip file)...', 'Validate Selected Returns...', and 'Validate All Non-validated Returns...'. A 'Launch Reports...' button and 'Queue Management...' options are also visible.

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.

The screenshot shows a table with columns: Return Level Errors, Errors (E, Q), OK Errors, and Return Level Notes. The 'Return Level Errors' column contains the text 'Return Level Errors'. The 'Errors' column has sub-columns 'E' and 'Q'. The 'E' value is 0 and the 'Q' value is 6, which is highlighted in red. The 'OK Errors' column has a value of 0. The 'Return Level Notes' column contains a small icon of a pencil. Below this table, there are more columns: Errors, OK Errors, Notes, and Windows.

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.

COLLECT Portal

Blade Error Report - SchoolCensus 2015_Summer

TDU Test Secondary 1 Error report on 30/04/2015 at 09:29

Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Count	787	Return Details												
1040		Pupil aged 5 or over with language missing or invalid	Errors	Details				<table border="1"> <tr><td>EntryDate</td><td>Apr 19 2015 12:00AM</td></tr> <tr><td>Government</td><td>School Governance</td></tr> <tr><td>Status</td><td>SFMSD - Comprehensive</td></tr> <tr><td>Phase</td><td>SS - Secondary (including HEGs and Academies)</td></tr> <tr><td>ReferenceDate</td><td>May 21 2015 5:00AM</td></tr> <tr><td>EntrySessionsPossible</td><td>10</td></tr> </table>	EntryDate	Apr 19 2015 12:00AM	Government	School Governance	Status	SFMSD - Comprehensive	Phase	SS - Secondary (including HEGs and Academies)	ReferenceDate	May 21 2015 5:00AM	EntrySessionsPossible	10
EntryDate	Apr 19 2015 12:00AM																			
Government	School Governance																			
Status	SFMSD - Comprehensive																			
Phase	SS - Secondary (including HEGs and Academies)																			
ReferenceDate	May 21 2015 5:00AM																			
EntrySessionsPossible	10																			
1040		Pupil aged 5 or over with language missing or invalid	Errors	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
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1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																
1081Q		Please check entry date: Sessions possible indicate the pupil attended school during the term prior to this date if the pupil left & was subsequently readmitted, the query will be accepted by DFE on condition a suitable explanatory notepad entry is provided	Queries	Details																

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 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 the local authority for further information.

Please note from summer 2015 it will only be possible to complete 'return level' notes. 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 for 'SC15 Summer'. The main table is titled 'Return Level Errors' and has columns for 'Data Item', 'Value', 'Errors' (with sub-columns 'E' and 'Q'), 'OK Errors', and 'Return Level Note'. A red circle highlights the 'Return Level Note' column header and a pen icon in the first row of the table. Below the table, there is a section for 'School Census Summer 2015' with various data items and their values.

Data Item	Value	Errors		OK Errors	Return Level Note
		E	Q		
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-05-21	34	60	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Estab	4201	0	0	0	
Software Code	XS.Template1.3	0	0	0	
Release	1.00 SC - SUM	0	0	0	
Version	1.0	0	0	0	
Serial No	1	0	0	0	
Saltime	2015-03-16 14:07:51	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

- 2) Click add new note

The screenshot shows the 'Note Detail' form in the COLLECT Portal. The form has a large text area for entering the note. A red circle highlights the 'Add New Note' button. Below the form, there is a section for 'Preserved notes deleted by resubmissions' with columns for 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. There is also a 'Remove Preserved Note' button.

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

The screenshot shows the 'COLLECT Portal' interface. At the top, there is a teal header with the text 'COLLECT Portal'. Below this is a section titled 'Note Page'. Inside this section, there is a sub-section titled 'Create New Note'. This sub-section contains a text input field with the placeholder text 'Type note and error number in here'. Below the input field, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is circled in red. At the bottom left of the page, there is a small blue icon and 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 local authority is responsible for 'approving' the return once the school has 'submitted' it. The local authority is expected to investigate and resolve any outstanding return errors before approving a return.

To 'Approve' returns you can either:

- 1) Go to the 'agent main screen' and select a school by clicking on its name, once selected, approve the return by clicking the '**Approve**' (approve the highlighted single return)
- 2) or '**Approve All**' button (approves all returns at submitted stage).

COLLECT Portal
Agent Page SchoolCensus 2015_Summer

Filter By: Name Native ID Status Org Group Queue

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
6	5	1	0	0	609	178	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
S201045	TDU Test Nursery School 1	No_Data					0	0	0
S202000	TDU Test Primary 1	No_Data					0	0	0
S202018	TDU Test Primary 2	No_Data					0	0	0
S201100	TDU Test PRU 1	No_Data					0	0	0
S206924	TDU Test CTC 1	No_Data					0	0	0
S204001	TDU Test Secondary 1	Submitted	29/04/2015				609	178	0

Page 1 of 1

Screen information will be updated:

The screenshot shows the Department for Education COLLECT Portal. The page title is 'Agent Page SchoolCensus 2015_Summer'. There is a filter section with fields for Name, Native ID, Status, Org Group, and Queue. Below this is a 'Performance summary' table with columns: Expected (6), Outstanding (5), Submitted (0), Approved (1), Authorised (0), and Errors (E: 580, Q: 175, OK: 0). The 'Submitted' and 'Approved' cells are circled in red. Below the summary is a 'Sources' table with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The row for source ID 5204001 shows Status 'Approved', SubmittedDate '30/04/2015', and ApprovedDate '30/04/2015', with Errors: 580, Queries: 175, and OK Errors: 0. The 'Approved' status and '30/04/2015' date are circled in red. At the bottom, there is an action bar with 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.

- 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.

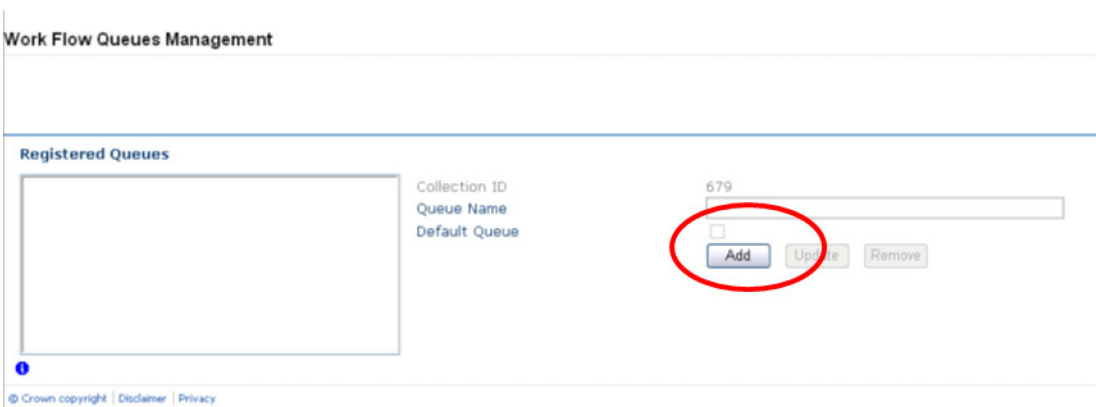
The use of 'queues' helps in the allocation and identification of who is working on which files and therefore helps to ensure that two or more people don't try and work on the same file.

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



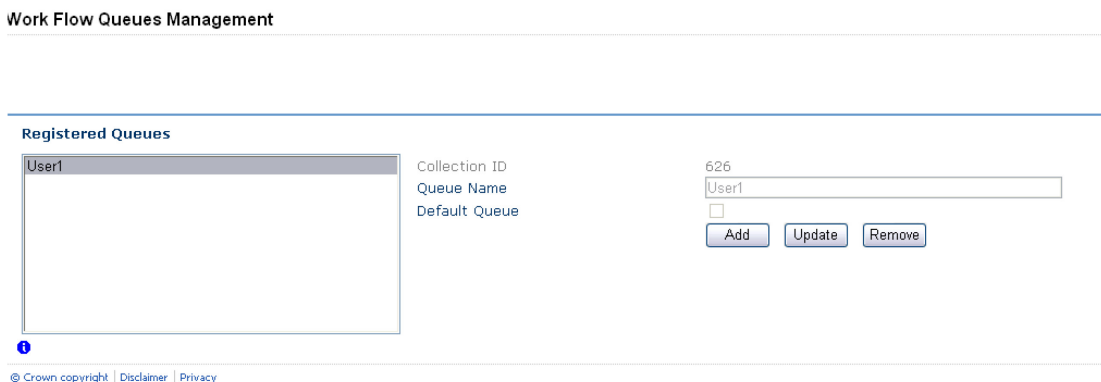
This will take you to the page entitled 'Work Flow Queues Management'

- 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 local authorities' 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.

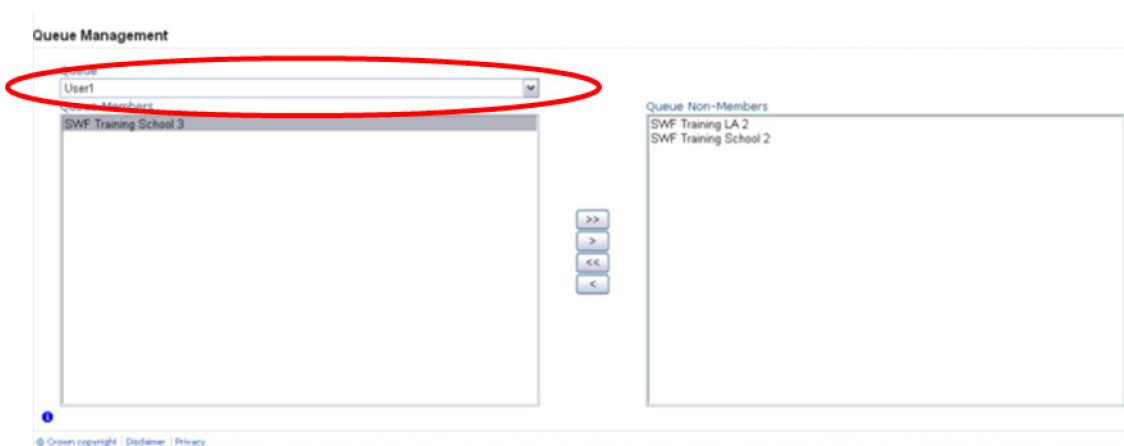
The **'Remove'** button allows you to remove a name/description from the 'Registered Queues' list. However, this can only be done if any schools linked with a particular name are removed first.

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 local authorities 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'

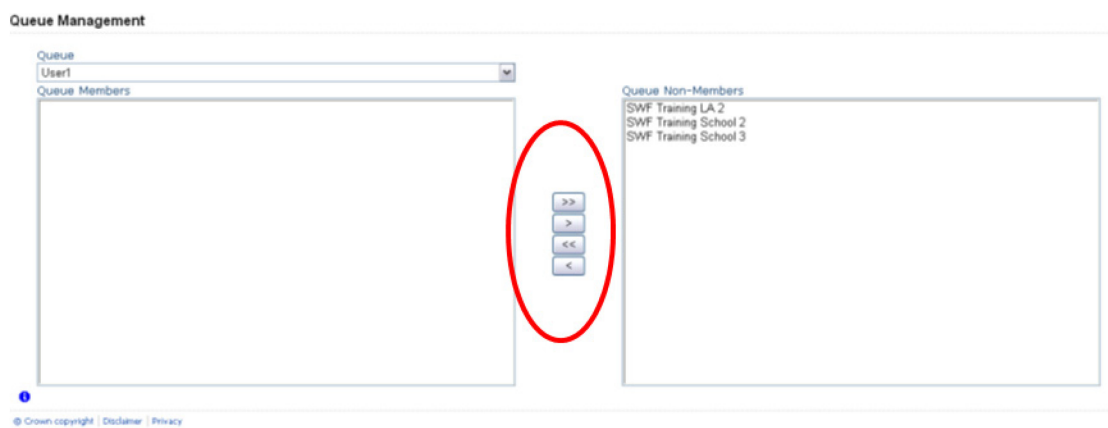


- 4) You can now select and add or remove schools to and from different queues (click the right hand down arrow alongside the 'Queue' box to see a drop down list of names).



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.

COLLECT Portal
Agent Page SchoolCensus 2015_Summer

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

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
6	5	1	0	0	609	178	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5201045	TDU Test Nursery School 1	No_Data					0	0	0
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5200924	TDU Test CTC 1	No_Data					0	0	0
5204001	TDU Test Secondary 1	Submitted	29/04/2015				609	178	0

Page 1 of 1

Open Returns... Approve... Approve All... Unapprove... Reject... Delete... Export Selected... Export Multiple... Export All...
Upload Multiple Returns (.zip file)... Agent Administration...
Validate Selected Returns... Validate All Non validated Returns...
Launch Reports... Queue Management... Change Queue... Move to this queue -->

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 local authority/schools as each pupil is funded only once.

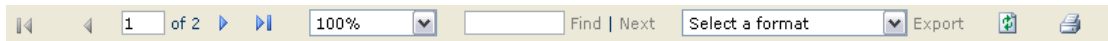
There will be individual user guides for reports available on the education website.

[School census 2015](#)

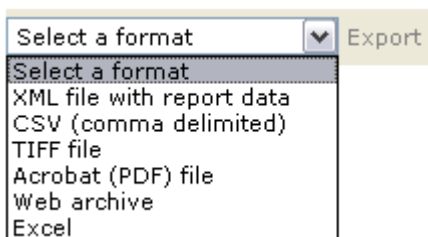
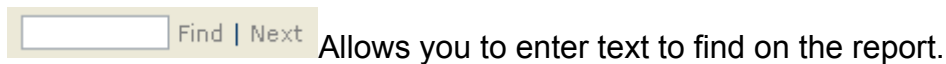
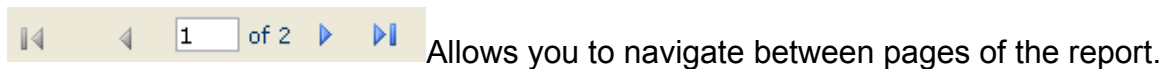
2) Select the report you wish to run and click launch report.

Viewing your report

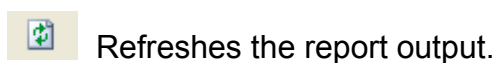
Once you have launched your report you will be able to view on screen. Along the top of the report you will see a toolbar with various functions.



These are explained as follows.



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.





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

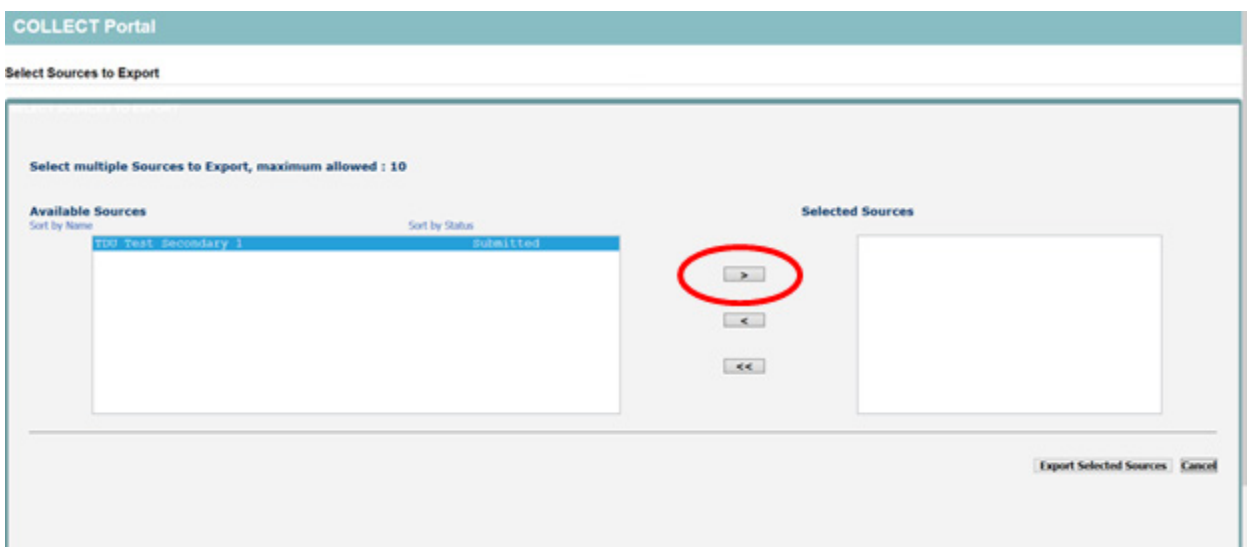


Export selected

- 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. Regulations do provide DfE with the legal power to share information on academies, any such sharing has to be in accordance with the Data Protection Act (DPA). In particular condition 5(b) of schedule 2, that is, the disclosure of information is necessary for the exercise of a statutory function by a person, in this case the local authority.

In light of this requirement, the DfE currently only has legal permission to share a subset of academy data direct with local authorities any data items which the DfE cannot share will be excluded from the local authority 'academy export'.

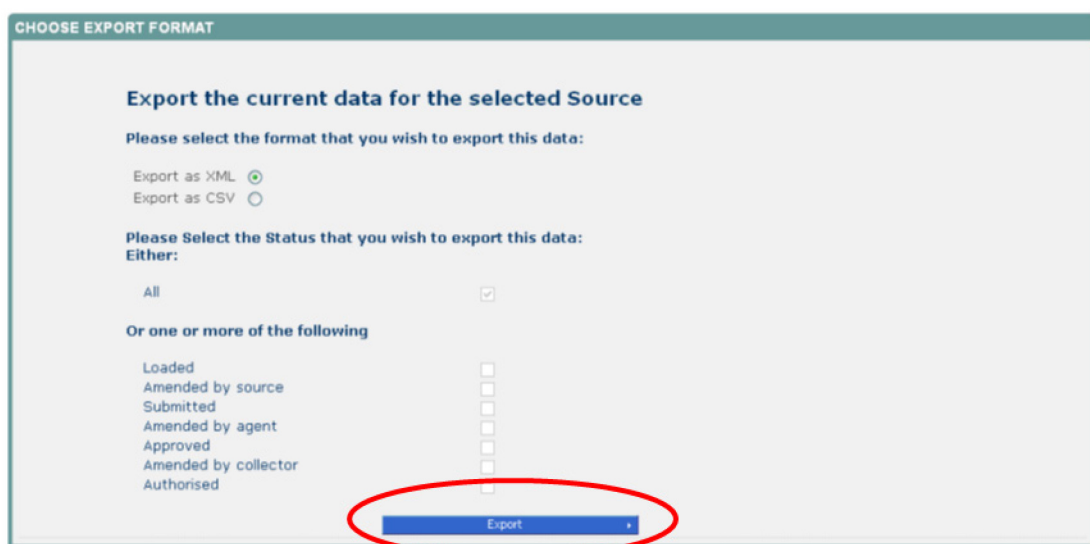
- 1) Click on academy export



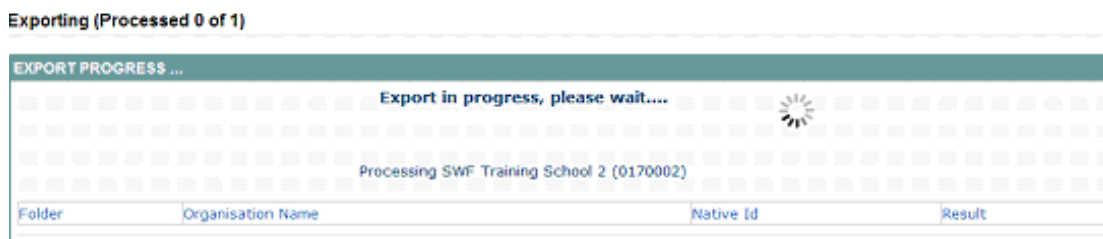
Selecting format

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

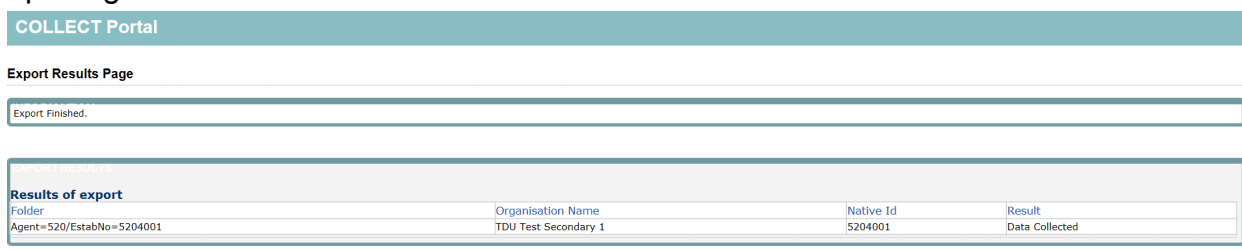
- 1) Choose to export in either XML or CSV format, then click on the 'Export' button.

A screenshot of a dialog box titled 'CHOOSE EXPORT FORMAT'. The dialog contains the following text: 'Export the current data for the selected Source', 'Please select the format that you wish to export this data:', 'Export as XML' (selected with a radio button), 'Export as CSV', 'Please Select the Status that you wish to export this data: Either:', 'All' (checked with a checkbox), 'Or one or more of the following', a list of status options (Loaded, Amended by source, Submitted, Amended by agent, Approved, Amended by collector, Authorised) each with an unchecked checkbox, and an 'Export' button at the bottom. The 'Export' button 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.



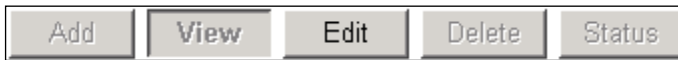
Navigation controls

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, eg 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 have access to COLLECT for school census you will need to complete the service request form, also 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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