



Department
for Education

School census2015

COLLECT guide – local authorities

October 2015

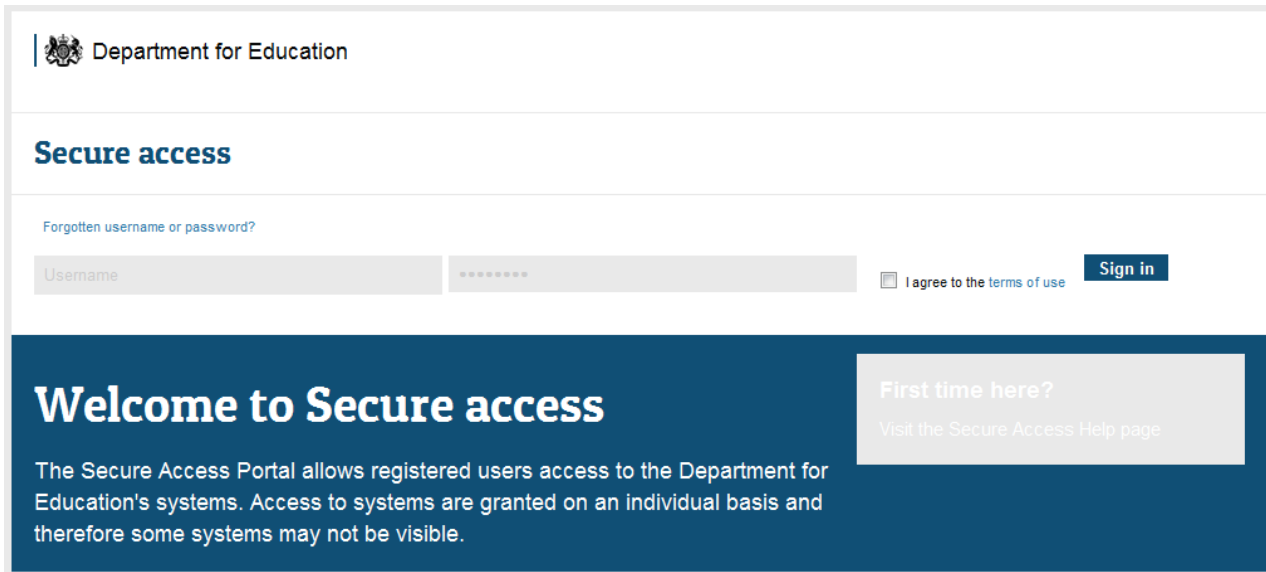
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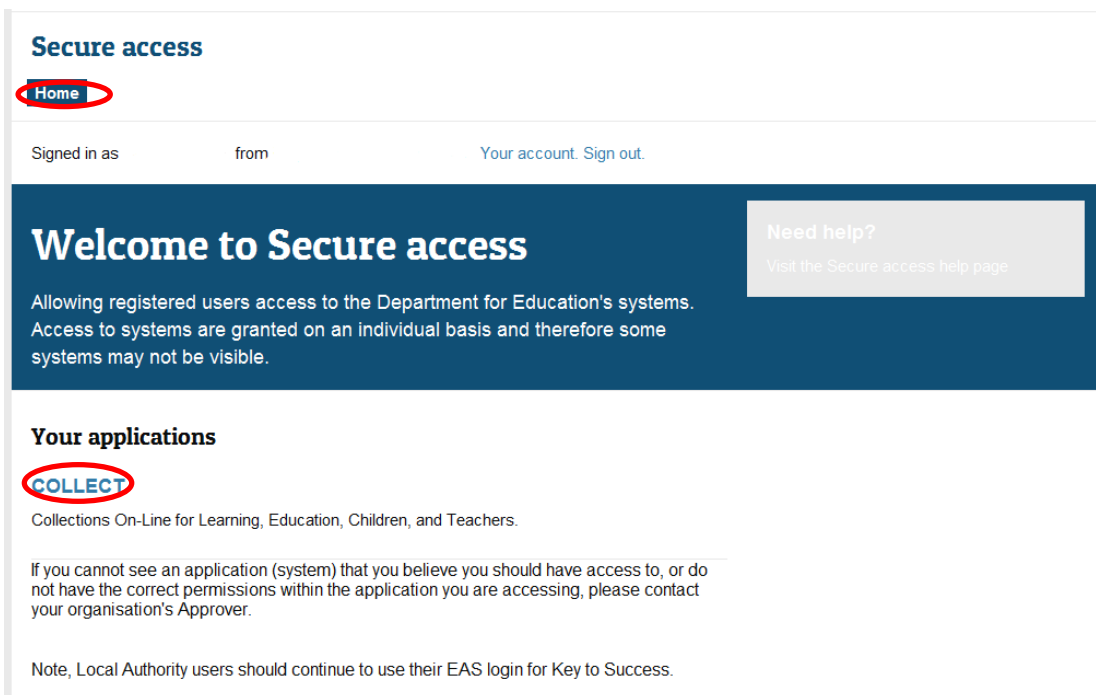
COLLECT and secure access

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



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




PROCEED INTO COLLECT

[Continue...](#)

Code of Conduct

[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.



Home Page

MY DATA COLLECTIONS

Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2015_Autumn	Agent	XXX	Testing	01/10/2015 00:00:00	96

[Select Data Collection](#)

Agent page

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

Sources							Errors		
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
xxxxxx	xxxxxxxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	0

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The agent screen comprises four main sections:

- Filter by
- Performance summary
- Sources
- Agent functions

Filter by

Filter By:	Name	Native ID	Status	Org Group	Queue	<input type="button" value="Go"/>	<input type="button" value="Reset"/>
------------	------	-----------	--------	-----------	-------	-----------------------------------	--------------------------------------

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's 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
35	26	9	0	0	855	274	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 eg 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							Errors		
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
xxxxxx	xxxxxxxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	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

Open Return...	Approve...	Approve All...	Unapprove...	Reject...	Delete...	Export Selected...	Export Multiple...	Export All...
Upload Return for selected Source...	Upload Multiple Returns (zip file)...	Agent Administration...		Academy Export				
Validate Selected Return...		Validate All Non-validated Returns...						
Launch Reports...	Queue Management...	Change Queue...	Move to this queue --:	▼				

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.

Sources							Errors		
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
xxxxxx	xxxxxxxxxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	0

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- 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.

- 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.

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.

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.

Sources

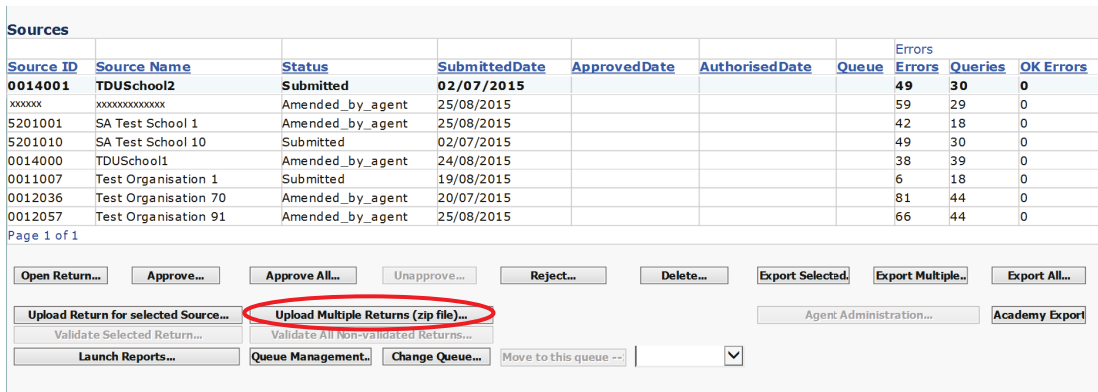
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
xxxxxx	xxxxxxxxxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	0

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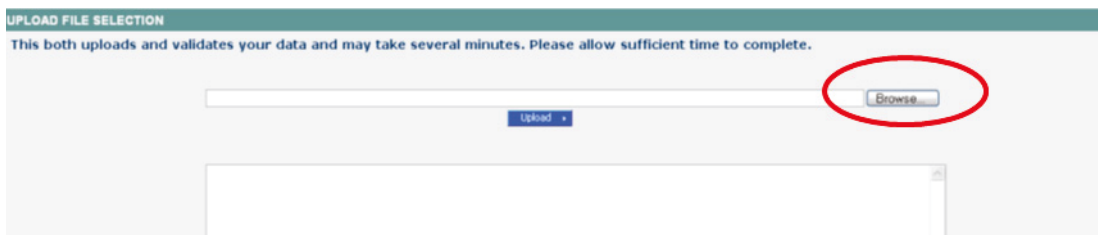
Uploading multiple files

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.

Sources							Errors			
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors	
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0	
xxxxxx	xxxxxxxxxxxxxx	Amended_by_agent	25/08/2015				59	29	0	
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0	
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0	
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0	
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0	
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0	
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	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	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.

SC15 Autumn

Approve All Errors All Notes [Add](#) [View](#) [Edit](#) [Delete](#) [Status](#)

SC15 Autumn [133]

- Levels
- School [233]
 - Characteristics
 - Pupil On Roll [370]
 - Annual Attendance
 - Characteristics
 - Identifiers
 - Status
 - Summer Half Term Attendance
 - Termly Exclusions
 - Termly Exclusions
 - Termly Session Details
 - Addresses
 - AnnualSessionDetails
 - Learning Aims [100]
 - FSMperiod
 - Summer Half Term 2 Session Details [27]
 - Pupils No Longer On Roll
 - Annual Attendance
 - Characteristics
 - Identifiers
 - Status

SC15 Autumn -

All notes must be added in the "Return Level Notes" section.

Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		0	2	0	
Data Item	Value	Errors		OK Errors	History
School Census Autumn 2015					
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-10-01				
Source Level	S	0	0	0	
LA	001	0	0	0	
Estab	2656	0	0	0	
Software Code	CCS-SIMS	0	0	0	
Release	7:59 3:62 172	0	0	0	
Xversion		0	0	0	
Serial No	4	0	0	0	
Datetime	2014-11-14 15:35:10	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

This enables data fields to be manually edited within COLLECT.

Please note: Any changes made within COLLECT must 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			OK Errors
							E	Q		
xxxxxx	xxxxxxxxxxxxxx	Amended_by_agent	25/08/2015				39	29	0	
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0	
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0	
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0	
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0	
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0	
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0	
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	0	

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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.

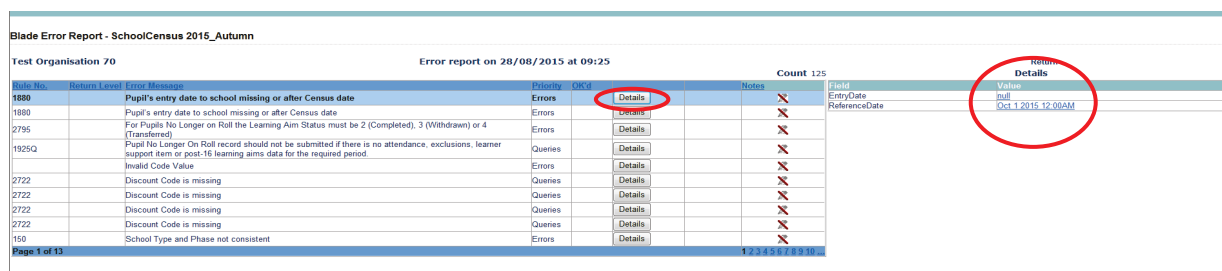
Return Level Errors	Errors		OK Errors	Return Level Notes
	E	Q		
	0	6	0	

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 an 'Error Report' table. The table has columns for 'Return Level', 'Error Message', 'Priority', 'DKC', 'Details', 'Notes', 'Count', 'Field', and 'Value'. The 'Details' column contains underlined links. The 'Details' button for the first row is circled in red. The 'Value' column shows 'Null' and 'Oct 1, 2015, 12:00AM'.

Return Level	Error Message	Priority	DKC	Details	Notes	Count	Field	Value
1980	Pupil's entry date to school missing or after Census date	Errors		Details		X	EntryDate	Null
1980	Pupil's entry date to school missing or after Census date	Errors		Details		X	ReferenceDate	Oct 1, 2015, 12:00AM
2795	For Pupils No Longer on Roll the Learning Aim Status must be 2 (Completed), 3 (Withdrawn) or 4 (Transferred)	Errors		Details		X		
1925Q	Pupil No Longer On Roll record should not be submitted if there is no attendance, exclusions, learner support dem or post-16 learning aims data for the required period.	Queries		Details		X		
	Invalid Code Value	Errors		Details		X		
2722	Discount Code is missing	Queries		Details		X		
2722	Discount Code is missing	Queries		Details		X		
2722	Discount Code is missing	Queries		Details		X		
2722	Discount Code is missing	Queries		Details		X		
150	School Type and Phase not consistent	Errors		Details		X		

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. Returns can not be authorised by the department until an acceptable explanation is provided for any outstanding queries.

Please note it is only 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.

SC15 Autumn

Approve All Errors All Notes Add View Edit Delete Status

SC15 Autumn [133]

- Levels
- School [233]
 - Characteristics
 - Pupil On Roll [370]
 - Annual Attendance
 - Characteristics
 - Identifiers
 - Status
 - Summer Half Term Attendance
 - Termly Attendance
 - Termly Exclusions
 - Termly Session Details
 - Addresses
 - AnnualSessionDetails
 - Learning Aims [100]
 - FSMperiod
 - Summer Half Term 2 Session Details [27]
 - Pupils No Longer On Roll
 - Annual Attendance
 - Characteristics
 - Identifiers
 - Status

All notes must be added in the "Return Level Notes" section

Data Item	Value	Errors		OK Errors	Return Level Notes
		E	Q		
School Census Autumn 2015	SC	0	0	0	
Collection	AUT	0	0	0	
Term	2015	0	0	0	
Reference Date	2015-10-01	131	0	0	
Source Level	S	0	0	0	
LA	001	1	0	0	
Estab	2056	1	0	0	
Software Code	CCS-SIMS	0	0	0	
Release	7.159.3.62.172	0	0	0	
Xversion		0	0	0	
Serial No	4	0	0	0	
Datetime	2014-11-14 15:35:10	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

- 2) Click add new note

Note Detail

Preserved notes deleted by resubmissions

User	Role	Organisation	Native ID	Date and Time
------	------	--------------	-----------	---------------

Preserved Note Detail

Add New Note Remove Note

- 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 'Create New Note' form. The form has a text area with the placeholder text 'Type note and error number in here'. At the bottom of the form, 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.

Eg – 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' a return:

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

Sources							Errors		
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
xxxxxxx	xxxxxxxxxxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Submitted	02/07/2015				49	30	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				38	39	0
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0
0012057	Test Organisation 91	Amended_by_agent	25/08/2015				66	44	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)... Agent Administration... Academy Export

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

Launch Reports... Queue Management... Change Queue... Move to this queue --: [v]

- 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:

The screenshot shows a 'Performance summary' table and a 'Sources' table. In the 'Performance summary' table, the 'Submitted' and 'Approved' columns are circled in red. In the 'Sources' table, the 'SubmittedDate' and 'ApprovedDate' for the last row are circled in red. Below the tables, the 'Unapprove...' button is circled in red.

Expected		Outstanding		Submitted		Approved		Authorised		Errors			
8		0		6		1		1		E	Q	OK	
											386	260	0

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
xxxxxxx	xxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Authorised	27/08/2015	27/08/2015	27/08/2015		41	34	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				42	43	0
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	26/08/2015				81	44	0
0012057	Test Organisation 91	Approved	26/08/2015	27/08/2015			66	44	0

- 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.

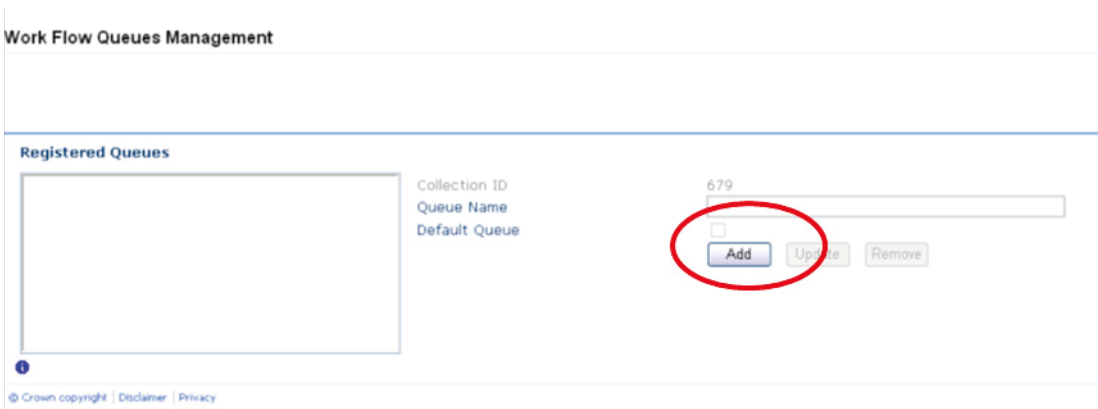
The use of 'Queues' helps in the allocation and identification of who is working on which files and therefore helps to ensure that two or more people do not try and work on the same file.

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



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

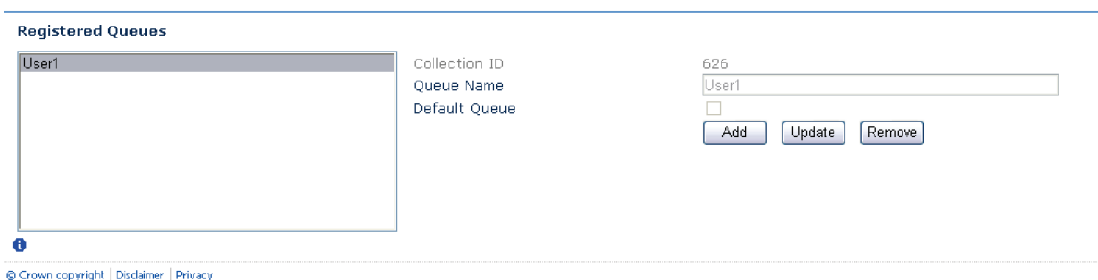
- 2) To add a name, click the 'Add' button.



- 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 authority's validation procedures).

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

Work Flow Queues Management



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

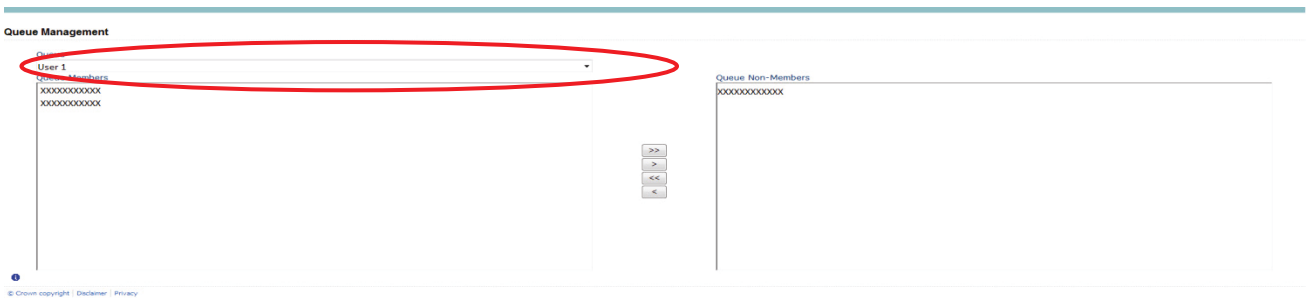
The **'Remove'** button allows you to remove a name/description from the 'Registered Queues' list. However, this can only be done if any schools linked with a particular name are removed first.

Note: 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'**

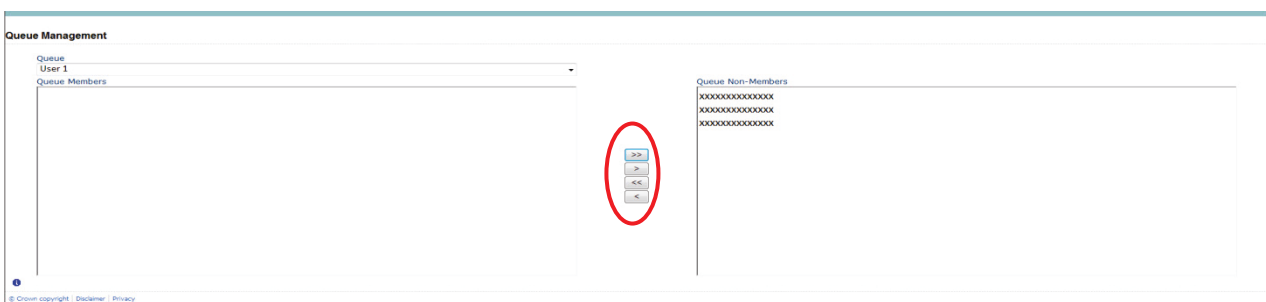


4) You can now select and add or remove schools to and from different queues (click the right hand down arrow alongside the 'Queue' box to see a drop down list of names).



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.

Performance summary							Errors		
Expected	Outstanding	Submitted	Approved	Authorised		E	Q	OK	
8	0	6	1	1		386	260	0	

Sources							Errors		
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
xxxxxxx	xxxxxxx	Amended_by_agent	25/08/2015				59	29	0
5201001	SA Test School 1	Amended_by_agent	25/08/2015				42	18	0
5201010	SA Test School 10	Authorised	27/08/2015	27/08/2015	27/08/2015		41	34	0
0014000	TDUSchool1	Amended_by_agent	24/08/2015				42	43	0
0014001	TDUSchool2	Submitted	02/07/2015				49	30	0
0011007	Test Organisation 1	Submitted	19/08/2015				6	18	0
0012036	Test Organisation 70	Amended_by_agent	20/07/2015				81	44	0
0012057	Test Organisation 91	Approved	26/08/2015	27/08/2015			66	44	0

- 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.

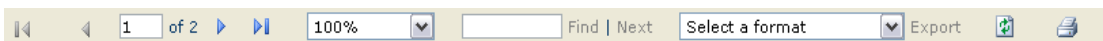
In spring and autumn school census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your local authorities and schools as each pupil is funded only once.

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

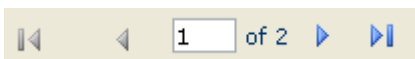
School census 2015

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

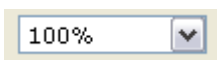
Along the top of the report you will see a toolbar with various functions.



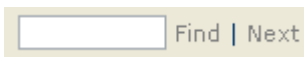
These are explained as follows.



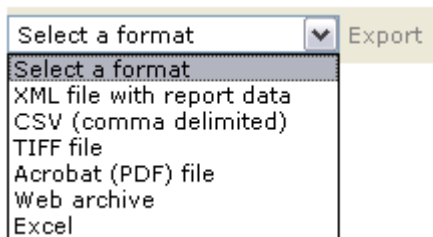
Allows you to navigate between pages of the report.



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

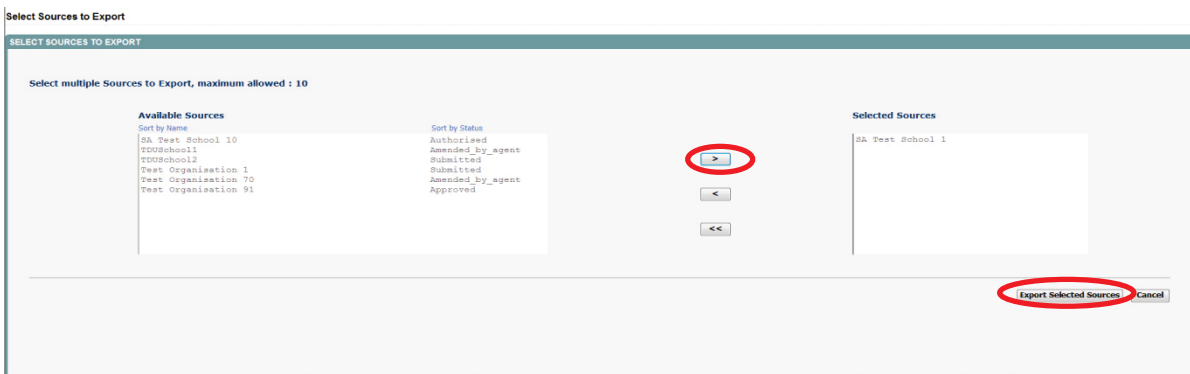


Export selected

- 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



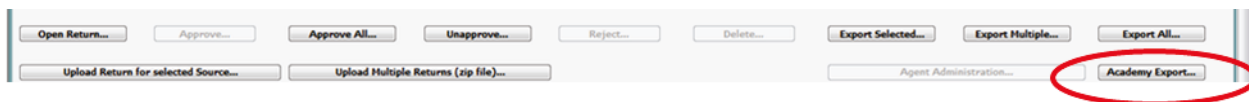
Export all

- 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.

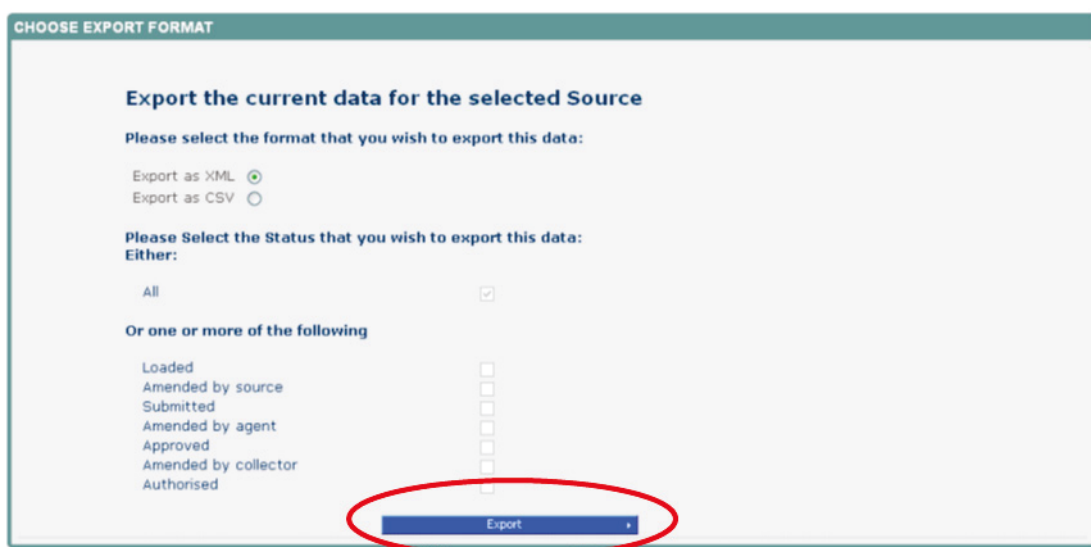
- 1) Click on academy export



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 a dialog box titled 'CHOOSE EXPORT FORMAT'. The main heading is 'Export the current data for the selected Source'. Below this, it says 'Please select the format that you wish to export this data:'. There are two radio button options: 'Export as XML' (selected) and 'Export as CSV'. Below that, 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 of the dialog, there is a blue 'Export' button, which is circled in red.

- 2) A progress message will be displayed



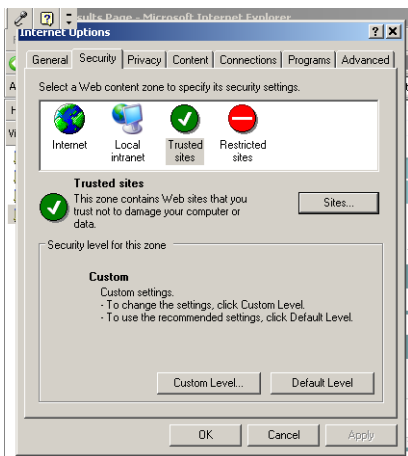
- 3) When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



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 again. Then try running 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

Do not 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.



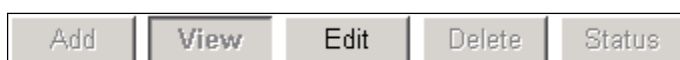
Navigation controls

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 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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