



Department
for Education

School census 2015

COLLECT guide – academies, free schools, studio schools, UTCs and NMSS.

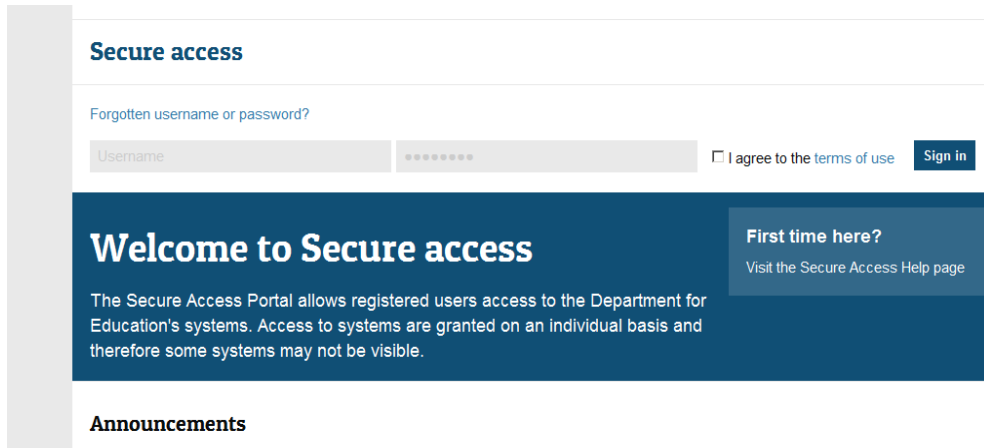
October 2015

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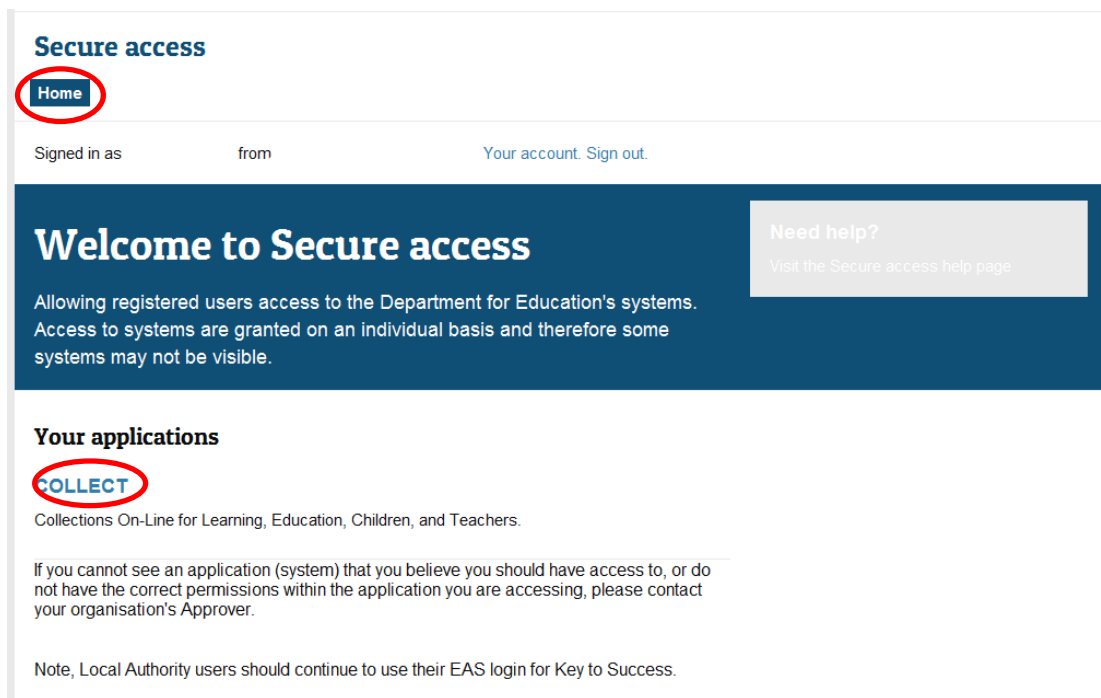
COLLECT and secure access

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.



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



Select the collection you wish to open 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 2014_Summer	Collector	Department for Education	Testing	16/05/2014 00:00:00	-467
SchoolCensus 2014_Summer	Administrator	Department for Education	Testing/Live	16/05/2014 00:00:00	-467
SchoolCensus 2015_Autumn	Agent	Department for Education	Testing	01/10/2015 00:00:00	36
SchoolCensus 2015_Autumn	Collector	Department for Education	Testing	01/10/2015 00:00:00	36
SchoolCensus 2015_Autumn	Administrator	Department for Education	Testing/Live	01/10/2015 00:00:00	36
SchoolCensus 2015_Spring	Agent	Department for Education	Open	15/01/2015 00:00:00	-223
SchoolCensus 2015_Spring	Collector	Department for Education	Open	15/01/2015 00:00:00	-223
SchoolCensus 2015_Spring	Source	TDUSchool1	Open	15/01/2015 00:00:00	-223
SchoolCensus 2015_Summer	Collector	Department for Education	Open	21/05/2015 00:00:00	-97
SchoolCensus 2015_Summer	Agent	Department for Education	Open	21/05/2015 00:00:00	-97

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Select Data Collection

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?

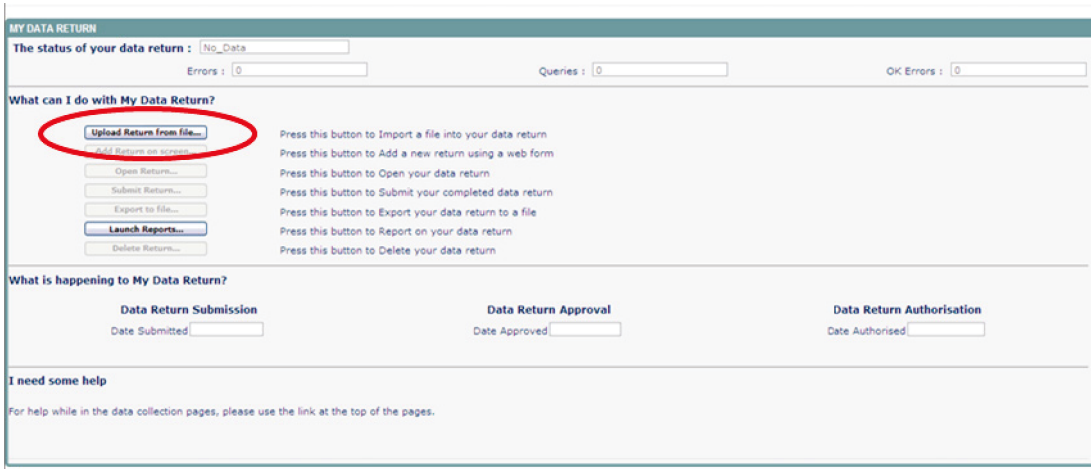
Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

I need some help

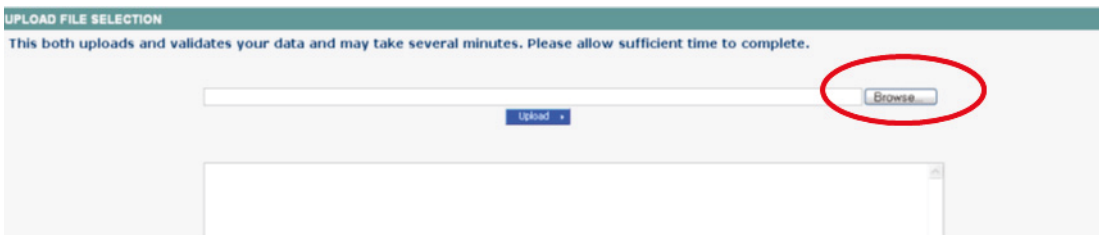
For help while in the data collection pages, please use the link at the top of the pages.

Loading a return

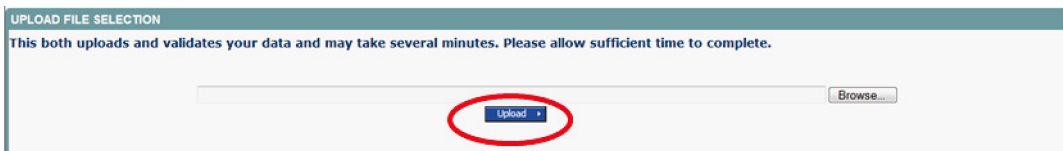
1) Click on 'Upload return from file'



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.

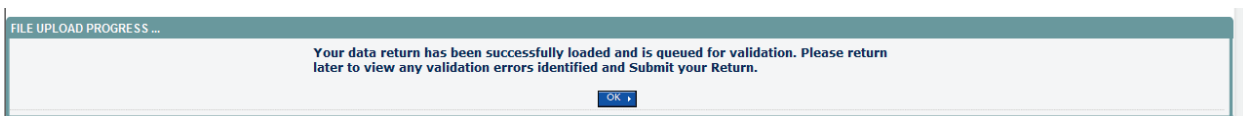


A progress message may be displayed whilst the upload is taking place.

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.

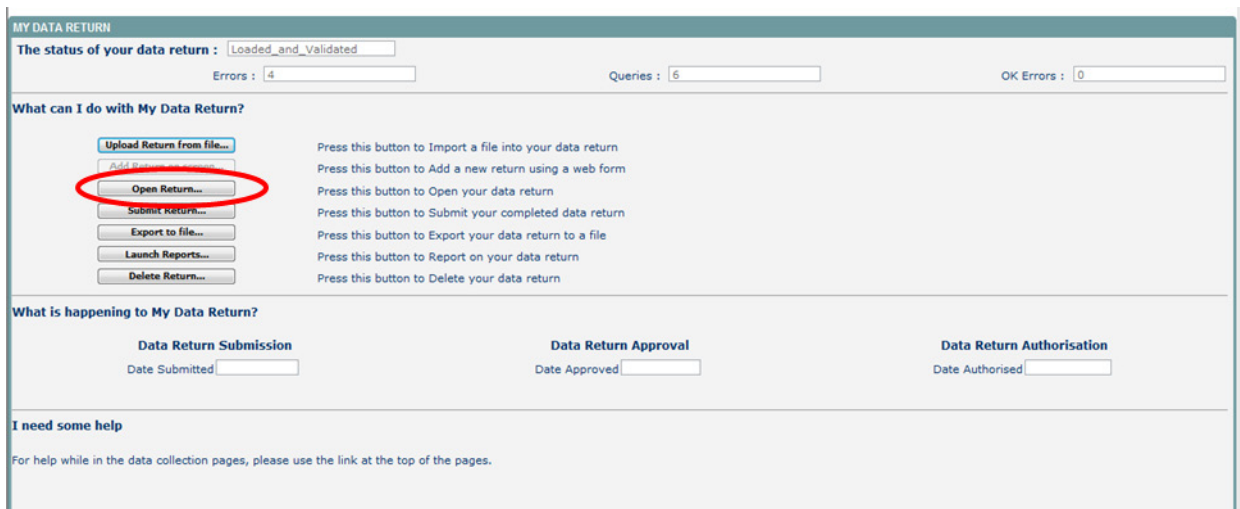
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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. At the top, it says 'Source Page SchoolCensus'. Below that 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 : 5', and 'OK Errors : 0'. Below this, there is a section titled 'What can I do with My Data Return?' with several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...'. Each button has a corresponding instruction. At the bottom, there is a section titled 'What is happening to My Data Return?' with three columns: 'Data Return Submission' (Date Submitted: [input]), 'Data Return Approval' (Date Approved: [input]), and 'Data Return Authorisation' (Date Authorised: [input]). Finally, there is a section titled 'I need some help' with a link to help pages.

Viewing the return details

1) To view your data return click on 'Open Return'.



Your return will then be displayed

Return Level Errors						Errors		OK Errors	Return Level Notes
						E	Q		
						0	13	0	
Data Item	Value	Errors		OK Errors	History				
School Census Autumn 2015						E	Q		
Collection	SC	0	0	0					
Term	AUT	0	0	0					
Year	2015	0	0	0					
Reference Date	2015-10-01	13	0	0					
Source Level	S	0	0	0					
LA	520	1	0	0					
Estab	1001	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			

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. We have enabled editing at school level.

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

The screenshot shows the 'SC15 Autumn' data entry interface. 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 tree view on the left with categories like 'Levels', 'School [25]', 'Pupil On Roll [34]', etc. The main area displays 'SC15 Autumn - SA Test School 1' with a table of data items and error counts. A message states: 'All notes must be added in the "Return Level Notes" section'. The table below shows data items and their values, with error counts in the 'Errors' column.

Data Item	Value	Errors		OK Errors	Return Level Notes
		E	Q		
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-10-01	13	0	0	
Source Level	S	0	0	0	
LA	520	1	0	0	
Estab	1001	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

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 Ddata' for full instructions on how to change data.

Errors

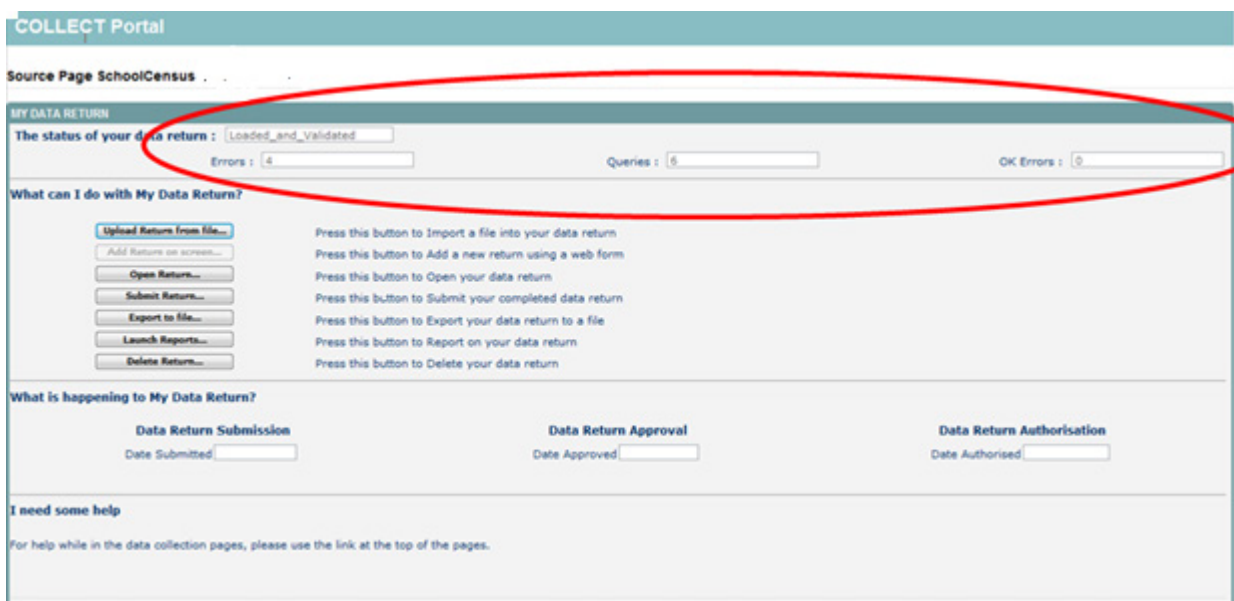
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

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.



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.

	Errors		OK Errors	Return Level Notes
	E	Q		
Return Level Errors	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.

Blade Error Report - SchoolCensus 2015_Autumn

SA Test School 1

Error report on 26/08/2015 at 13:42

Count 60

Return

Rule No.	Return Level	Error Message	Priority	DiCd	Notes	Field	Value
1859		Funded hours cannot be more than the Hours at Setting	Errors				
		Invalid Code Value	Errors			FundedHours	6.0
						Governance	CA - Academies
						HoursAtSetting	Dec 31 2013 12:00AM
						Intake	SPEC - Special
						Phase	SP - Special
						ReferenceDate	null
130		DCSF Number and Phase are not consistent	Errors				
1840		Pupil aged 5 or over with Language missing or invalid	Errors				
1840		Pupil aged 5 or over with Language missing or invalid	Errors				
1840		Pupil aged 5 or over with Language missing or invalid	Errors				
1840		Pupil aged 5 or over with Language missing or invalid	Errors				
5048		Pupil's type of class can only be returned from schools with a phase of PS or AT and may be present only for pupils in NC Year N1, N2, R, or 1-7	Errors				
5048		Pupil's type of class can only be returned from schools with a phase of PS or AT and may be present only for pupils in NC Year N1, N2, R, or 1-7	Errors				
5057		Attendance information is not required from schools with a phase of NS or SP	Errors				

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1 2 3 4 5 6

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) 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

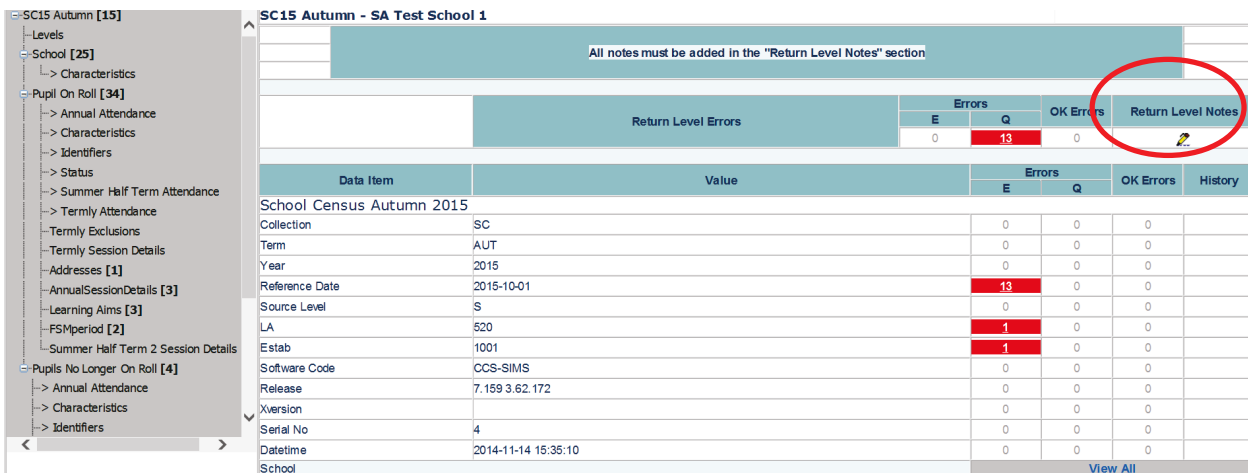
Providing clarification/ supplementary information

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.

Please note it is only possible to complete 'return level' notes. Return level notes are not overwritten if a resubmission is made.

To add a return level note double click on the pen icon in the return level notes section.

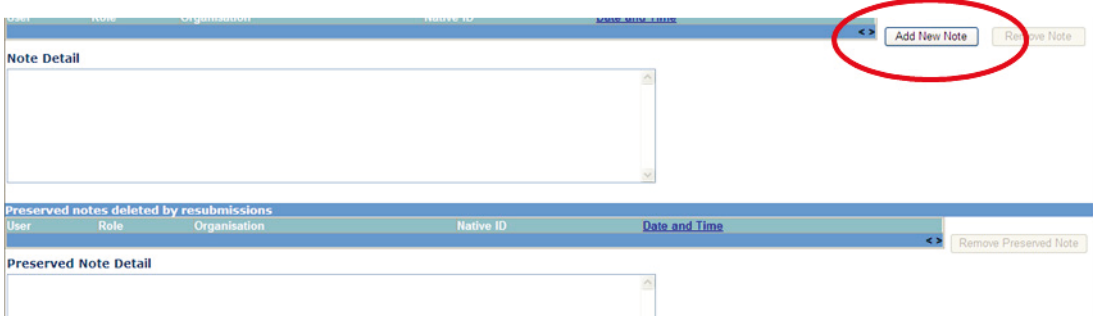


SC15 Autumn - SA Test School 1

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					
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-10-01		13	0	
Source Level	S	0	0	0	
LA	520		1	0	
Estab	1001		1	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

Click add new note



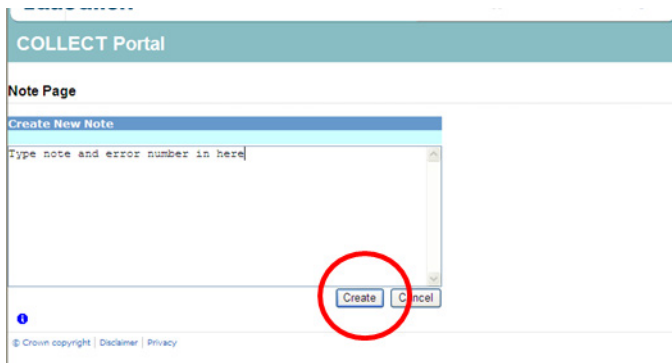
Note Detail

Preserved notes deleted by resubmissions

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

Preserved Note Detail

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.

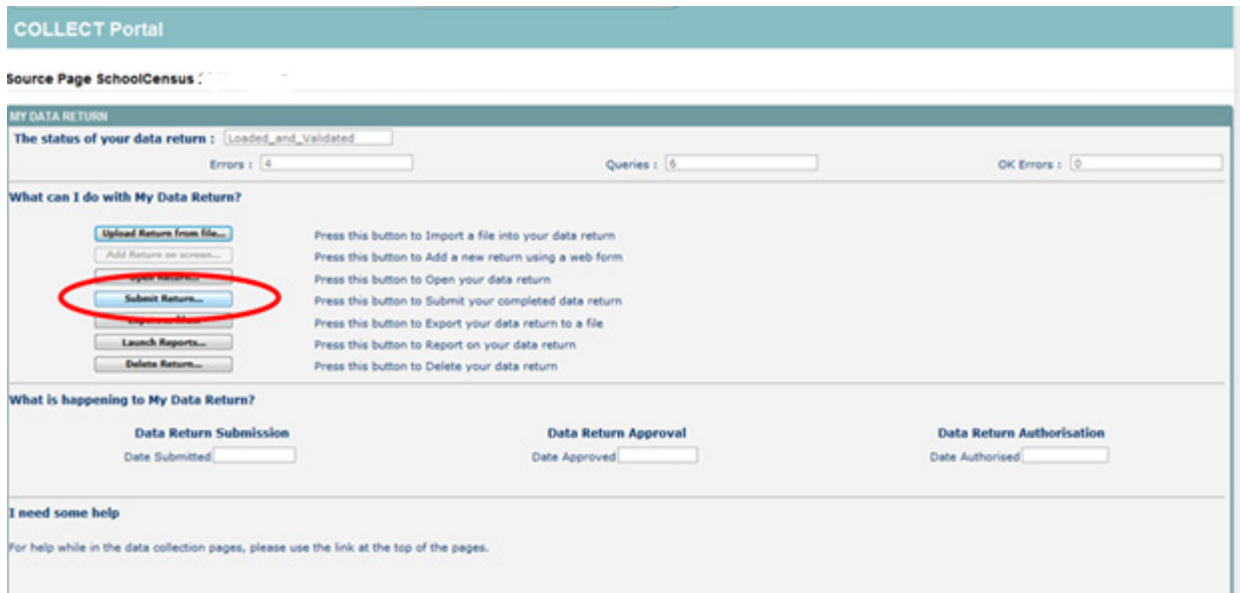
For example – 3 x 2020Q – Confirmed correct, 1 x 1780Q – Confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in summer term

Submitting the return

The school is responsible for 'submitting' the return once the data has been checked and any explanatory notes have been added.

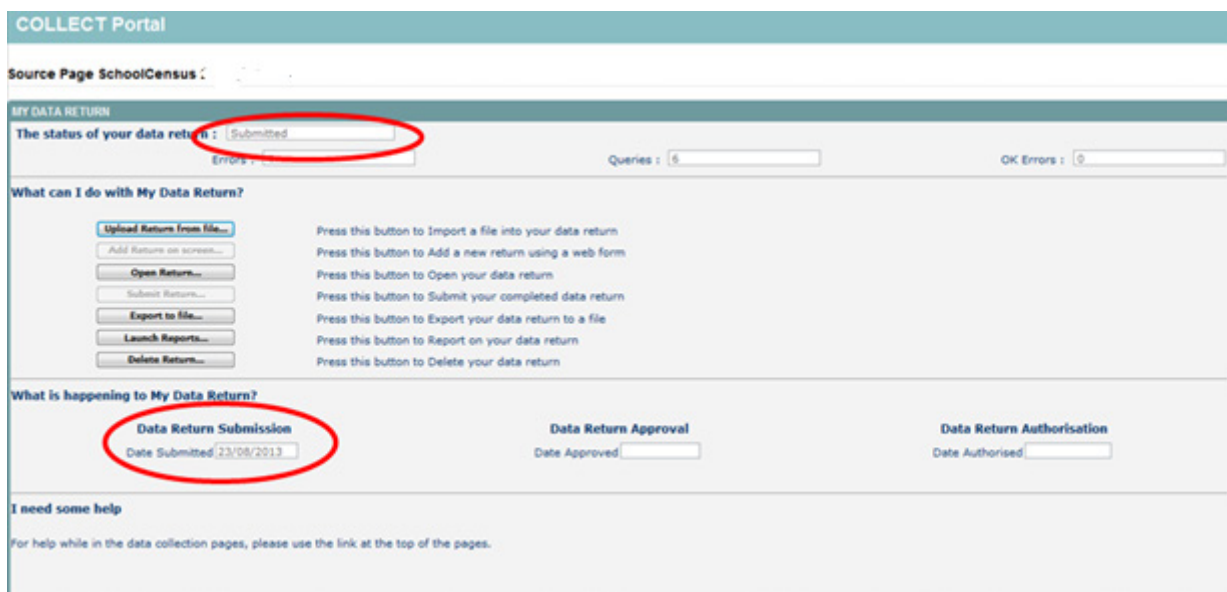
To 'Submit' your return:

- 1) Go to the 'source main screen' and click on 'Submit Return'.



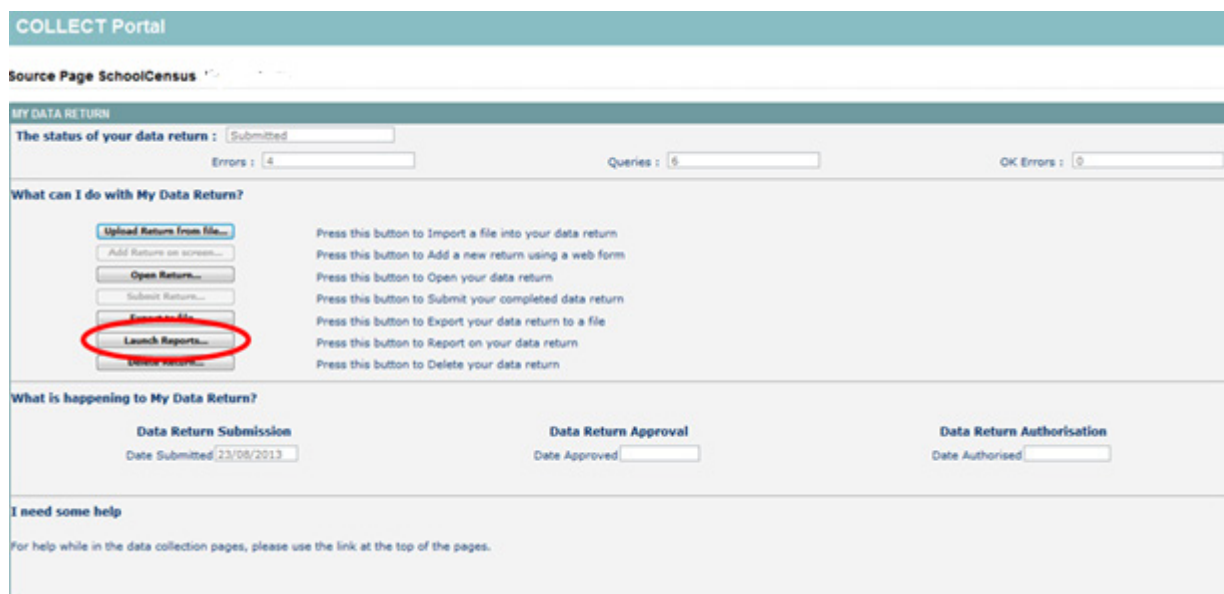
The screen will be updated

- 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



Reports

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



- 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.

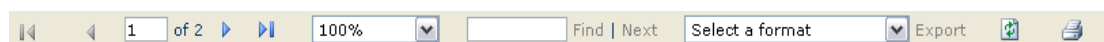
In spring and autumn school census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your school as each pupil is funded only once.

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.

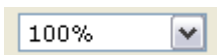
Along the top of the report you will see a toolbar with various functions.



These are explained as follows.



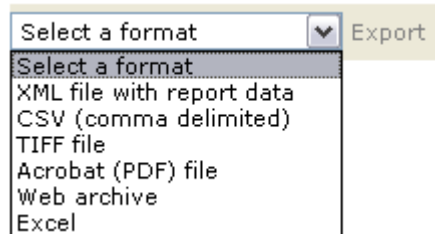
Allows you to navigate between pages of the report.



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.

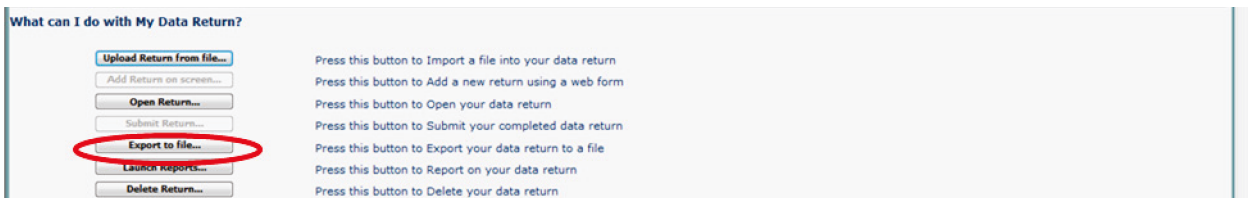
Exporting a return

A return can be exported in XML or CSV format

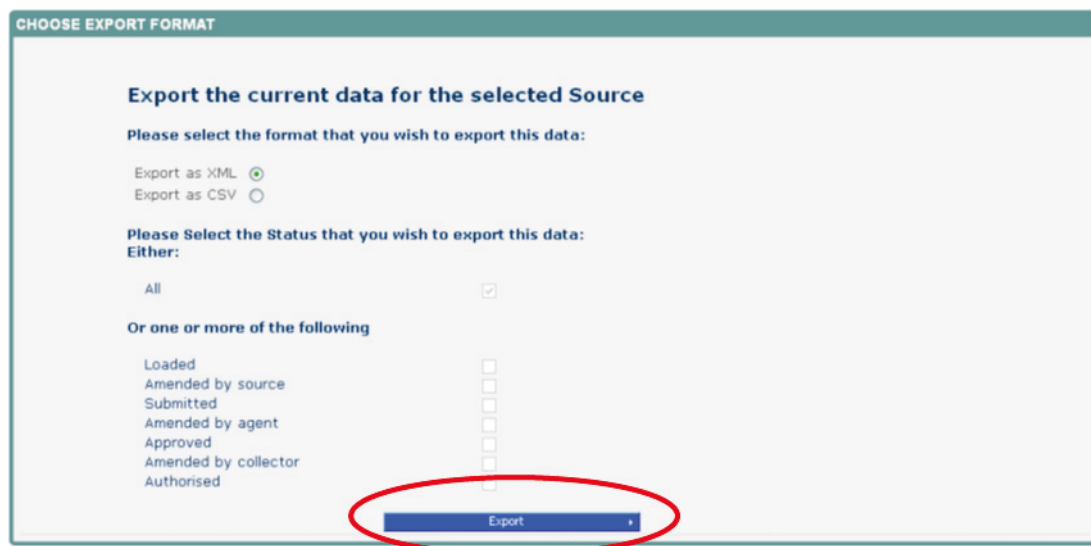
Exporting a return (current state)

On the **source page**

- 1) Click on 'Export to file'



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



A progress message will be displayed



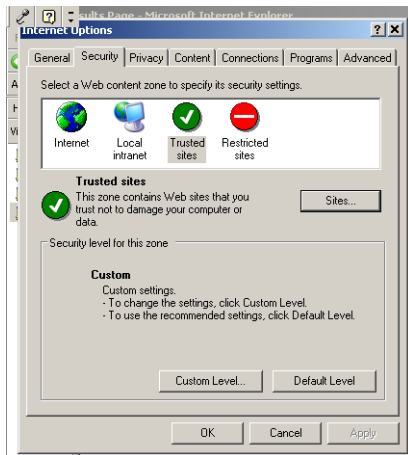
When complete the result of the export will be displayed and you will be offered

- 3) 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

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.



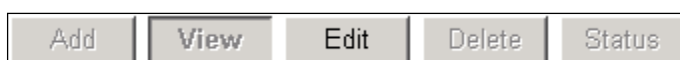
Navigation controls

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



Department
for Education

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