

# School workforce census 2015: COLLECT guide for academies

Instructions for academies, CTCs and free schools on how to use COLLECT to submit their data

September 2015

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# Introduction

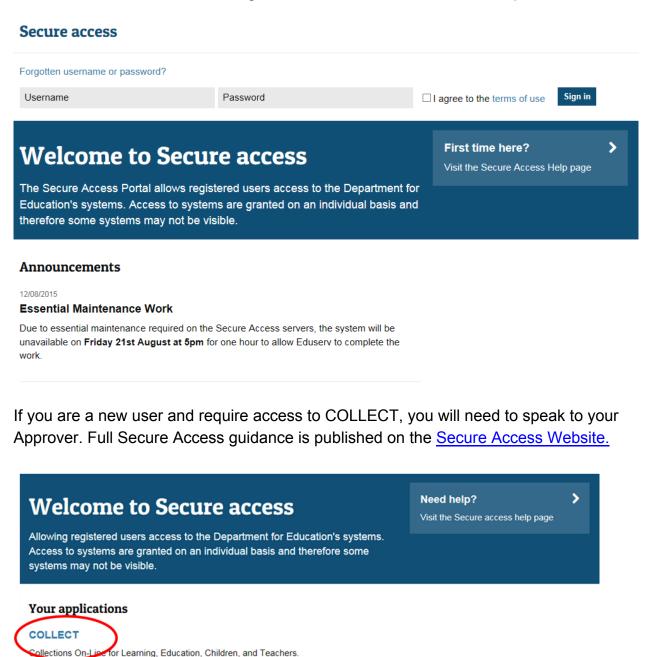
The COLLECT (Collections Online for Learning, Education, Children and Teachers) Portal is used by schools, academies, local authorities and the Department for Education (DfE) for processing data collection returns. Major benefits of the portal include real time data collection monitoring and progress reporting, the ability of a local authority to view exactly the same information as DfE when queries arise and being a website there are no installation issues.

This document is designed to guide users through the various aspects of COLLECT as related to the school workforce census data return from initial submission, data validation and final approval by DfE.

The department now collects data from a wide range of users; generic terminology must be used within COLLECT. A provider of data is known as a 'source', and a 'collector' is the final destination of the information.

# Secure Access (SA) and the COLLECT Portal

To access Secure Access existing users will need their username and password.

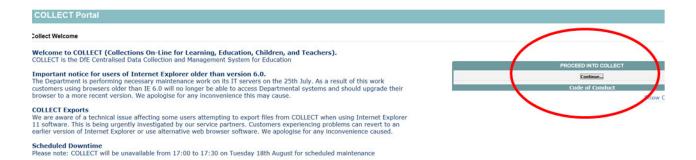


Once you have logged in you will see the link for COLLECT, click on this link highlighted below.

Click the continue button.

Then click on to 'Continue' to enter COLLECT

for Learning, Education, Children, and Teachers.



If you are bounced back to your homepage at this point please check that you are not trying to access the site from a link within an e-mail. Please copy and paste the address into the address bar then save it to your favourites.

Please follow the steps below to add the web addresses to your trusted sites

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**', Then select **'Add'** and type the following into the text box:

https://collectdata.education.gov.uk

Then select ok and ok. Please check that the secure access site is also in the trusted sites

The addresses should appear in the large box

Trusted sites	×
You can add and remove websites from this zon this zone will use the zone's security settings.	ne. All websites in
Add this website to the zone:	
https://sa.education.gov.uk	Add
Websites:	
*.gpn.gov.uk https://collectdata.education.gov.uk	Remove
Require server verification (https:) for all sites in this	zone
	Close

# Source Page Screen

The Source main screen will be displayed

Organisation	Status Due Date	Days Due
Name of school	Open Date census is due	

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.

The Source data return screen will be displayed

MY DATA RETURN		
The status of your data return : No_Data		
Errors : 0	Queries : 0	OK Errors : 0
What can I do with My Data Return?		
Upload Return from file	Press this button to Import a file into your data return	
Add Return on screen	Press this button to Add a new return using a web form	
Open Return	Press this button to Open your data return	
Submit Return	Press this button to Submit your completed data return	
Export to file	Press this button to Export your data return to a file	
Launch Reports	Press this button to Report on your data return	
Run Matching	Press this button to match records from different souorces in your return	
Resolve Matching	Press this button to manually match records from different sources in your return	
Run Reconciliation	Press this button to automatically reconcile matched records	
Resolve Reconciliation	Press this button to manually reconcile matched records	
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	Date Approved	Date Authorised

The screen is divided into three main sections:

- Return Status;
- Return Management;
- Return Progress.

#### **Return Status**



This shows the current status of the return and a breakdown of the errors within it. All information is read only. In the example above no return data has been uploaded so status reads 'No\_Data'

#### **Return Management**

n I do with My Data Return	?
Upload Return from file	Press this button to Import a file into your data return
Add Return on screen	Press this button to Add a new return using a web form
Open Return	Press this button to Open your data return
Submit Return	Press this button to Submit your completed data return
Export to file	Press this button to Export your data return to a file
Launch Reports	Press this button to Report on your data return
Delete Return	Press this button to Delete your data return

Provides a set of functions that can be used to manage the return. Those with bold text and highlighted borders are available. The availability of the functions is dictated by the status of the return.

#### **Return Progress**

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted	Date Approved	Date Authorised
View submitted data return	View approved data return	View authorised data return
Export submitted data return	Export approved data return	Export authorised data return

This shows the dates on which the return completed the three process milestones. This section is completed automatically as the return progresses through the workflow process.

# **Uploading a Return**

#### Click on the Upload return from file button

Upload Return from file	Press this button to Import a file into your data return
Add Return on screen	Press this button to Add a new return using a web form
Open Return	Press this button to Open your data return
Submit Return	Press this button to Submit your completed data return
Export to file	Press this button to Export your data return to a file
Launch Reports	Press this button to Report on your data return
Delete Return	Press this button to Delete your data return

Use the browse button to locate the file you wish to upload.

UPLOAD FILE SELECTION		
This both uploads and validates your data and may take sev	eral minutes. Please allow sufficient time to complete.	$\frown$
	Upload ,	Browse

Highlight the file name and click on Open to select it. Then click on the Upload button to load the file.

UPLOAD FILE SELECTION		
This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.		
		-
	L:\DSGD2\School Workforce 2015\Helpdesk\SWF Test acrool Return.xm	Browse
	Upload 🔸	

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

FILE UPLOAD PROGRESS		
	Data return upload in progress, please wait	2142
	Deleting existing data return	· · · ·
0		
© Crown copyright   Disclaimer   Privacy		

Once the return has been loaded, the following message will be displayed on screen

Source UpLoad In Progress	
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. 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.

Once the return has been validated, the return status section on main page will display "Loaded\_and\_Validated" and the total number of errors and queries found in the return will be displayed.

The status of your data return : Loa		-
Errors :	Queries : 1	OK Errors : 0
hat can I do with My Data Return?		
Upload Return from file	Press this button to Import a file into your data return	
Add Return on screen	Press this button to Add a new return using a web form	
Open Return	Press this button to Open your data return	
Submit Return	Press this button to Submit your completed data return	
Export to file	Press this button to Export your data return to a file	
Launch Reports	Press this button to Report on your data return	
Delete Return	Press this button to Delete your data return	
hat is happening to My Data Return	?	
Data Return Submissio	n Data Return Approval	Data Return Authorisation
Date Submitted	Date Approved	Date Authorised

# Viewing the Data Return

# **Opening the Return**

Open the return by clicking on the **Open Return** button.

MY DATA RETURN		
The status of your data return : Loaded_and_Validated		
Errors : 3		Queries : 6
What can I do with My Data Return?		
Upload Return from file	Press this button to Import a file into your da	ata return
Add Return on screen	Press this button to Add a new return using a	a web form
Open Return	Press this button to Open your data return	
Submit Return	Press this button to Submit your completed of	data return
Export to file	Press this button to Export your data return	to a file
Launch Reports	Press this button to Report on your data retu	m
Run Matching	Press this button to match records from diffe	erent sources in your return
Resolve Matching	Press this button to manually match records	from different sources in your return
Run Reconciliation	Press this button to automatically reconcile r	matched records
Resolve Reconciliation	Press this button to manually reconcile match	hed records
Delete Return	Press this button to Delete your data return	
What is happening to My Data Return?		
Data Return Submission		Data Return Approval
Date Submitted		Date Approved

The header information for the return will be displayed.

		All Errors	All Notes	1	Add	View	Edit Del	lete SI
the of Workforce Annual Collection	School Workforce Annual Collection - TDUSc	hool10						
Source				Errors Queries	ОК	Re	turn Level No	otes
CBDS Levels	RETURN LEVEL ERRORS (Errors and queries associated	d with this full return, not individual fields.)		0 2	0		2	
-SchoolWorkforceModules								
School Workforce Member [7]	Data Item		Value		Errors	Errors Queries	ок	Histo
-Given Name	HEADER INFORMATION				Errors	Queries	Un	
-Former Family Name	Collection	School Workforce Census			0	0	0	-
Contract or Service	Year	2015			0	0	0	-
-Additional Payment	Reference Date	2015-11-05			0	0	0	
Role	View Source Details	2010 11 00						View
-Additional Payment								
-Absence								
-Curriculum								
Qualification								
Subjects								
School								
-Vacancy								
-Occasionals								
-Agency TP Support Count								

#### **Screen Functionality**

Before viewing the return it is useful to understand some of the basic controls and screen operations.

## **Screen Navigation**

To return to the previous page, press the 'Drill Up' button

hool Workforce Annual Collection						Drill Up	Error	
Source	Source - TDUSchool1	0					in I	_
-CBDS Levels				Software Code	Rule E			-
SchoolWorkforceModules	SWF LA 1	Estab 4009	Source Level School	Software Lode SWF Convertor	Rule E	11015		
School Workforce Member [7]	SHIF EAT	4005	JUNDI	SWP CONVEND				
-Given Name						Errors		
-Former Family Name		Data Item		Value	Errors	Queries	ОК	His
Contract or Service	SOURCE							
-Additional Payment	Source Level		School		0	0	0	
Role	LA		SWF LA 1		0	0	0	
-Additional Payment	Estab		4009		0	0	0	
Absence	Software Code		SWF Convertor		0	0	0	
Curriculum	Release		1		0	0	0	
Qualification	Xversion				0	0	0	_
LSubjects	Serial No		1		0	0	0	1
ichaol	DateTime		2015-03-26 13:20:20		0	0	0	-
Vacancy	View CBDS Levels							Vies
Occasionals	View School Workforce M							View
-Agency TP Support Count	View School Workforce M	embers						View
LA	View School Details							View

**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.

#### **Mode Buttons**

Those buttons determine which operation mode the on-screen data form is in, and which operations are available

Add	View	Edit	Delete	Statu
-----	------	------	--------	-------

Dark Grey text on sunken button with light border = Active Mode Black Text on button and highlighted border = Available Mode Light Grey text on button with light border = Unavailable Mode

## Filter Left Hand Menu

Please avoid using the left hand filter menu (grey panel on the left hand side of the **page**) to navigate through the return as it does not always display sections of the return in the correct format and functions such as Add or Edit are not always available

Workforce Annual Collection	Source - TDUSchool1	0		
BDS Levels choolWorkforceModules	LA	Estab	Source Level	Software Code
chool Workforce Member [7]	SWF LA 1	4009	School	SWF Convertor
-Given Name				
-Former Family Name		Data Item		Value
-Contract or Service	SOURCE			
-Additional Payment	Source Level		School	
-Role	LA		SWF LA 1	
-Additional Payment	Estab		4009	
Absence	Software Code		SWF Convertor	
Curriculum	Release		1	
Qualification	Xversion			
LSubjects	Serial No		1	
chool	DateTime		2015-03-26 13:20:20	
-Vacancy	View CBDS Levels			
Occasionals	View School Workforce M			
Agency TP Support Count	View School Workforce M View School Details	embers		
A	View School Details View LA Details			

# **Viewing the Return Details**

Access the source details by clicking on the **View All** button in the 'View Source Details' row on the original screen displaying the header details for the return.

			-	All Errors All Notes		View Ed	Deletr	e Stat
chool Workforce Annual Collection	Source - TDUSchool1	0				Drill Up Al	Error	
-CBDS Levels -SchoolWorkforceModules	LA	Estab	Source Level	Software Code	Rule Er	rors		
School Workforce Member [7]	SWF LA 1	4009	School	SWF Convertor	0			
Given Name								
Former Family Name		Data Item		Value	Errors	Errors Queries	OK	Hist
-Contract or Service	SOURCE		1.		Linois	Queries	UN	-
-Additional Payment	Source Level		School		0	0	0	
Role	LA		SWF LA 1		0	0	0	-
-Additional Payment	Estab		4009		0	0	0.	-
Absence	Software Code		SWF Convertor		0	0	0	
Curriculum	Release		1		0	0	0	-
Qualification	Xversion				0	0	0	-
LSubjects	Serial No		1		0	0	0	-
School	DateTime		2015-03-26 13:20:20		0	0	0	-
Vacancy	View CBDS Levels							View
Occasionals	View School Workforce M							View
-Agency TP Support Count	View School Workforce M View School Details	lembers						View
-LA	View School Details View LA Details							View

Now access the workforce member details by clicking on the **View All** button in the 'View School Workforce Members' row

Source - TDUSchool10					Drill Up	Error	
A SWF LA 1	Estab 4009	Source Level School	Software Code SWF Convertor	Rule El O	TOIS		
Dat	a Item		Value		Errors		History
SOURCE	anem		Value	Errors	Queries	OK	mistory
SOURCE Source Level		School		0	0	0	
A		SWF LA 1		0	0	0	1
stab		4009		0	0	0	
oftware Code		SWF Convertor		0	0	0	
elease		1		0	0	0	
version				0	0	0	
erial No		1		0	0	0	
ateTime		2015-03-26 13:20:20		0	0	0	

This displays the 'Records List' section, with all members of staff visible

School Workforce Annual Collection								Drill Up	Error		
Source	School Workforce Member - TI	DUSchool10							SINotes		
CBDS Levels									54190204		
SchoolWorkforceModules	Filter By: Teacher Number	Family Name	Gender	∨ Date of	Birth	QT Status		✓ Re	eset	Go	
-School Workforce Member [7]	Teacher Number	Name		Gender	Date of Birth	QT Statu	15	Rule	Errors		
-Given Name	9999999	SURNAME 1,NAME		Not Known	2000-10-01	True		2			
-Former Family Name	9999998	SURNAME_2,NAME	_2	Not Known	2000-10-01	True		2			
Contract or Service	9999997	SURNAME_3,NAME	_3	Not Known	2000-10-01	True		3			
-Additional Payment								Errors			
Role	Data Iter	n		Value			Errors	Queries	ОК	Histo	
-Additional Payment	WORKFORCE MEMBER						Litoit	quonos	on	-	
Absence	Staff Details										
Curriculum	Teacher Number		9999999				0	0	0		
Qualification	Family Name		SURNAME_1				0	0	0		
Subjects	Given Name										
School	NAME_1										
Vacancy	MIDNAME_1										
Occasionals	View Given Name(s)									View	
Agency TP Support Count	Former Family Name FORMER 1	Former Eamily Name									
	View Former Family Name(S)									View	
	NI Number		XX9999999C				0	0	0	-	
	Gender		Not Known				0	0	0	-	
	Date of Birth		2000-10-01				-	0	0		
	Ethnic Code		WBRI - White - British						0	-	
							0	U	0	_	
	Disability		no				0	0	0	_	
	QT Status		True				0	1	0		
	HLTA Status		True				1	0	0		
	QTS Route		Mutual Recognition from NI, Scotland	or the EEA			0	0	0		
	View Contract/Agreement Details									View	
	View Absence Details View Curriculum Details									View View	

## **Record List**

Clicking on one of the blue column headers e.g. 'Date of Birth' will order all the records in date of birth. The record list can be sorted ascending or descending by clicking once or twice on the header of any of the columns.

chool Workforce Annual Collection Source	School Workforce Member - T	DUSchool10						Drill Up	Error	
-CRDS Levels								1	ENstes	
SchoolWorkforceModules	Filter By: Teacher Number	Family Name	Gender	VDa	the of Birth	OT Status		V Re	set	Go
School Workforce Member [7]	Teacher Number	Name		Gender	Date of Birth	OT Str	the state of the s	Rule		
-Given Name	9999999	SURNAME 1,NAME	1	Not Known	2000-10-01	True		2		
-Former Family Name	9999998	SURNAME_2,NAME	2	Not Known	2000-10-02	True		2		
Contract or Service	9999997	SURNAME_3,NAME	L3	Not Known	2000-10-03	True		3		_
-Additional Payment						<u> </u>				
Role	Data Ite	m		Value	$\sim$ $\sim$		Errors	Errors Queries	ОК	Histor
-Additional Payment	WORKFORCE MEMBER						Cirora	duerres	UN	
Absence	Staff Details									
Curriculum	Teacher Number		9999999				0	0	0	
Qualification	Family Name		SURNAME_1				0	0	0	
LSubjects	Given Name									
School	NAME_1									
Vacancy	MIDNAME_1									1 A March
-Occasionals	View Given Name(s) Former Family Name									View
Agency TP Support Count	FORMER 1									
LA	View Former Family Name(5)									View /
	NI Number		009999990				0	0	Ó	
	Gender		Not Known				0	0	0	
	Date of Birth		2000-10-01				1	1	0	
	Ethnic Code		WBRI - White - British				0	0	Ó	-
	Disability		no				0	0	0	
	QT Status		True				0		0	-
	HLTA Status		True						0	
	QTS Route		Mutual Recognition from NI. Scotland (	w the EEA			0		0	-
	View Contract/Agreement Details		reason recognized form re, ocotano i	A DR LLC			N		U	View A
	View Absence Details									View

The lower part of the screen will show the record details of the record highlighted in the top half of the screen

chool Workforce Annual Collection								Drill Up	Error	18
Source	School Workforce Member - TI	DUSchool10						15	Notes	_
-CBDS Levels	Filter	1				1				
-SchoolWorkforceModules	By: Teacher Number	Family Name	Gender	∨ Date	of Birth	QT Status		✓ Res	et	Go
-School Workforce Member [7]	Touchestin	Name		Gender	Date of Birth	Q1 an	100	1.111.1.1		-
Given Name	9999998	SURNAME 1.NAME SURNAME 2.NAME		Not Known Not Known	2000-10-01	True	-		_	
-Former Family Name	9999997	SURNAME_2,NAME	3	Not Known	2000-10-02	True		3		
Contract or Service		Doro e en L		100100				1000		
-Additional Payment	Data Iten			Value				Errors		
GRole		n		Value			Errors	Queries	OK	Histor
-Additional Payment	WORKFORCE MEMBER									
-Absence	Staff Details									-
Curriculum	Teacher Number		999999				0	0	0	
Qualification	Family Name	02	SURNAME_1				0	0	0	
LSubjects	Given Name							19 A.		
School	NAME_1 MIDNAME 1									
-Vacancy	View Given Name(s)									View A
-Occasionals	Former Family Name								_	view r
Agency TP Support Count	FORMER 1									
LA .	View Former Family Name(5)									View A
	NI Number	b	X999999C				0		0	
	Gender	h	lot Known				0	0		-
	Date of Bill	2	000-10-01				1		0	
	Et C Code		VBRI - White - British				0	0	0	
	sability						0	0	0	
	Status		nue				0		0	-
	HLTA status		irue				V		0	-
									0	-
	QTS Route	A	Jutual Recognition from NI, Scotland	or the EEA			0	0	0	View A
	View Contract/Agreement Colla									

You can sort the record set by given name by clicking on the 'Name' column in the 'Record List' section

ool Workforce Annual Collection ource	School Workforce Member - TD	USchool10								Drill Up		67
CBDS Levels											AT Notes	]
SchoolWorkforceModules	Filter By: Teacher Number	Family Name	Gender		✓ Date of Birth		QT Status			V F	eset	Go
School Workforce Member [7]	Teacher Number	Name		Gender		Date of Birth		QT State	115	Rule	Errors	
-Given Name	9999999	SURROUME_1,NAME	E_1	Not Known		2000-10-01		True		2		
-Former Family Name	9999998	SURNAME_2,NAM	E_2	Not Known		2000-10-02		True		2		
Contract or Service	9999997	SURNAME_3,NAM	E_3	Not Known		2000-10-03		True		3		
-Additional Payment										Errors		
Role	Data Item			1	Value				Errors	Queries	ОК	His
-Additional Payment	WORKFORCE MEMBER		1						Linvia	Querres	UN	
Absence	Staff Details											
Curriculum	Teacher Number		9999999						0	0	0	
Qualification	Family Name		SURNAME 1						0	0	0	
Subjects	Given Name										1	
School	NAME_1											
-Vacancy	MIDNAME 1											
												_
	View Given Name(s)											Vie
-Occasionals	View Given Name(s) Former Family Name											Vie
-Occasionals -Agency TP Support Count	View Given Name(s) Former Family Name FORMER_1											
Occasionals	View Given Name(s) Former Family Name FORMER_1 View Former Family Name(5)		haresessed.						0	0	0	
-Occasionals -Agency TP Support Count	View Given Name(s) Former Family Name FORMER_1 View Former Family Name(S) Ni Number		jorgegegege						0	0	0	
-Occasionals -Agency TP Support Count	View Given Name(s) Former Janniy Name FORMER 1 View Former Family Name(S) Ni Number Gender		Not Known						0	0	0	
-Occasionals -Agency TP Support Count	View Given Name(s) Former Family Name FORKE: 1 View Former Family Name(S) Nil Namber Gender Date of Birth		Not Known 2000-10-01						0	0	0	
-Occasionals -Agency TP Support Count	View Given Name(s) Science & Sciency Hame PORMER, 1 View Former Family Name(S) In Number Gender Date of Birth Ethnic Code		Not Known 2000-10-01 WBRI - White - British						0	0	0	
-Occasionals -Agency TP Support Count	View Grein Name) Forker, anny Menne Forker, anny Menne Forker, anny Menne View Former Family Name(5) Na Number Gonder Date of Birth Ethnic Gode Disabity		Not Known 2000-10-01 WBRI - White - British no						0	0 0 1 0	0	
-Occasionals -Agency TP Support Count	View Grein Name) Fond (aminy) form FORUER 1 View Former Family Name(5) Viel Namber Gander Date of Brith Ethnic Code Diability Qi Statua		Not Known 2000-10-01 W/BRI - White - British no True						0	0	0 0 0 0 0 0 0 0	
-Occasionals -Agency TP Support Count	View Grein Name) Forker, anny Menne Forker, anny Menne Forker, anny Menne View Former Family Name(5) Na Number Gonder Date of Birth Ethnic Gode Disabity		Not Known 2000-10-01 WBRI - White - British no						0	0 0 1 0 0	0	Vie

You can also filter the record set by typing the surname in the 'Family Name' box in the 'Filter Section' and then click on the **Go** button. The record details for that staff member should be displayed on screen.

chool Workforce Annual Collection								Drill Up	Error	10
Source	School Workforce Member - TE	USchool10							d Notes	
-CBDS Levels	Filter Total State				-	_	_		-	
-SchoolWorkforceModules	By: Teacher Number	Family Name	Gerder	✓ Date of Birth	·	QT Status		✓ Re	Jet .	Go
-School Workforce Member [7]	Teacher Number	Name		Gender	Date of Birth		T_Status	Rule I	tiers	
-Given Name	9999999 9999998	SURNAME_1,NAME	1	Not Known	2000-10-01 2000-10-02		rue	2		
-Former Family Name	9999998 9999997	SURNAME_2,NAME SURNAME_3,NAME	2	Not Known Not Known	2000-10-02		rue	2		
-Contract or Service	2222221	portrease_offerenc	-	Proc Portown	2000-10-03			_		
-Additional Payment								Errors		
Role	Data Item			Value			Errors	Queries	OK	His
-Additional Payment	WORKFORCE MEMBER									
Absence	Staff Details									
Curriculum	Teacher Number	1	999999				0	0	0	
-Qualification	Family Name	1	SURNAME_1				0	0	0	
Subjects	Given Name									
School	NAME_1									
-Vacancy	MIDNAME_1									1.00
-Occasionals	View Given Name(s)									Vie
Agency TP Support Count	Former Family Name FORMER 1									
-LA	View Former Family Name(5)									Viet
								1	0	
-LA		6	V000000				0			
-LA	NI Number		X999999C				0	0		-
-LA	NI Number Gender	)	lot Known				0	0	0	
-LA	NI Number Gender Date of Birth		lot Known 000-10-01				0	0	0	
-LA	NI Number Gender Date of Birth Ethnic Code		lot Known 1000-10-01 VBRI - White - British				0	0	0	
-LA	Ni Number Gender Date of Birth Ethnic Code Disability		lot Known 000-10-01 WBRI - White - British Io				0 0 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	0	0 0 0 0 0	
-14	N Number Gender Date of Birth Ethnic Code Disability QT Status		lot Known 1000-10-01 WBRI - White - British 10 Irue				0 0 1 0 0 0	0 0 1 0 0	0	
	Ni Number Gender Date of Birth Ethnic Code Disability OT Status H.T.A Status		lot Known 2000-10-01 VBRI - White - British Io True				0 0 1 0 0 0 0	-	0 0 0 0 0	
	N Number Gender Date of Birth Ethnic Code Disability QT Status		lot Known 1000-10-01 WBRI - White - British 10 Irue	the EEA			0 0 1 0 0 0 1 0	-	0 0 0 0 0 0 0	View

# **Editing within the Data Return**

Where possible data should be amended within the Schools Management Information System and a new return re-uploaded.

The default view when a screen is displayed is 'View' mode. To edit the details click on the 'Edit' button. The details for the workforce member will now be available to edit

School Workforce Annual Collection	School Workforce Member - TE	and the state							Drill Up	p Erro	ir 🗧
Source	School Workforce Member - TE	00School10								Al Notes	
-CBDS Levels	Filter Teacher Number		-	1						-	
SchoolWorkforceModules	By: Teacher Number	Family Name		Gender		✓ Date of Birth	QT Status		~	Reset	Go
School Workforce Member [7]	Teacher Number	Name			Gender	Date of	Birth	QT Status	Rul	e Errora	
Given Name	9999999	SURNAME_1,NAME	E_1		Not Known	2000-10		True	2		
-Former Family Name	9999998	SURNAME_2,NAME	E_2		Not Known	2000-10		True	2		
Contract or Service	9999997	SURNAME_3,NAME	E_3		Not Known	2000-10	-03	True	3		_
-Additional Payment											
Role	Data Item	1				Value		Errors	Errors Queries	ОК	- 1
-Additional Payment	WORKFORCE MEMBER							Errors	Queries	OK	
	Staff Details										
Absence	Teacher Number		9999999					0	1 0	0	-
Curriculum								0		0	
Qualification	Family Name		SURNAME_1					0	0	0	_
Subjects	Given Name NAME 1										
School	MONAME 1										
Vacancy	View Given Name(s)										V
Occasionals	Former Family Name										X
Agency TP Support Count	FORMER 1										
LA	View Former Family Name(5)										V
	NI Number		009999990					0	0	0	
	Gender		Not Known					0		0	
	Date of Birth								0	· ·	
			2000-10-01							0	
	Ethnic Code		WBRI - White - Briti	sh				0	0	0	
	Disability		no					0	0	0	
	QT Status		True					0	1	0	

Click on the 'QTS Route' cell in the 'Value' column: a drop down list of selectable values will be displayed.

School Workforce Annual Collection	School Workforce Member - TDU	School10							
Source	Filter Teacher Number	Family Name	Gende	r	✓ Date of Birth	QT Status		✓ Re	set
-CBDS Levels	By: Teacher Number	Name		Gender	Date of Birth		QT Status	Rule E	TION
-SchoolWorkforceModules	9999999	SURNAME 1,NAME	1	Not Known	2000-10-01		True	2	ALSAL#
School Workforce Member [7]	9999998	SURNAME_2,NAME	2	Not Known	2000-10-02		True	2	
Given Name	9999997	SURNAME_3,NAME	_3	Not Known	2000-10-03		True	3	
-Former Family Name									
-Contract or Service	Data Item				Value		Errors	Errors Queries	0
-Additional Payment	WORKFORCE MEMBER						Citors	Querres	
Role	Staff Details								
-Additional Payment	Teacher Number		9999999				0	0	
Absence	Family Name		SURNAME 1				-	0	
LSubjects	NAME_1 MIDNAME_1								
School									_
	View Given Name(s) Former Family Name								
-Vacancy	View Given Name(s) Former Family Name FORMER_1								
Vacancy Occasionals	Former Family Name								
-Vacancy -Occasionals -Agency TP Support Count	Former Family Name FORMER_1		XX3999999C				0	0	
-Vacancy -Occasionals	Former Family Name FORMER_1 View Former Family Name(S)		XX999999C Not Known				0 V 0	0	
Vacancy Occasionals Agency TP Support Count	Former Family Name FORMER_1 View Former Family Name(5) N Number		Not Known	la Course			0 V 0	0 0 1	0
Vacancy Occasionals Agency TP Support Count	Commer Family Name FORMER, 1 View Former Family Name(S) Ni Number Gender		Not Known Annual College Exit - Gradua Annual college Exit - Post G	te Course aduate Course			0 V 0 1 0	0	0
Vacancy Occasionals Agency TP Support Count	Former Family Name FORMER 1 View Former Family Name(5) Ni Number Gender Date of Bith		Not Known Annual College Exit - Gradua Annue College Exit - Post G Orrseas Trained Teacher Pr	ogramme			) 0 ) 0 ) 1 0 0		0
Vacancy Occasionals Agency TP Support Count	Eoreme Examply Name EORMER, 1 View Former Family Name(S) N Number Gender Date of Birth Ethnic Code		Not Known Annual College Exit - Gradua Annual college Exit - Post G Cerseas Trained Teacher Pr Overseas Trained Teacher Program Registered Teacher Program	ogramme it yet on Programme ne		<hr/>	× 0 0 0 0	1	000000000000000000000000000000000000000
Vacancy Occasionals Agency TP Support Count	Former Family Name FORMER, 1 View Former Family Name(5) Ni Number Gender Date of Birth Ethnic Code Disability	(	Not Known Annual College Exit - Gradua Annur College Exit - Post G Jersseas Trained Teacher pr Overseas Trained Teacher Programm Graduate Teacher Programm	ogramme it yet on Programme ne			> 0 - 0 - 0 - 0 - 0 - 0 - 1	1	000000000000000000000000000000000000000
Vacancy Occasionals Agency TP Support Count	Comme Family Nome COMER_1 View Former Family Name(5) In Number Gender Date of Birth Ethnic Code Disability QT Status	(	Not Known Annual Collage Exit - Oradua Annuar College Exit - Post G Gerseas Trained Teacher Pr Overseas Trained Teacher Program Graduate Teacher Program Teach First Programme Montal Rearcelose from No	ogramme it yet on Programme ne				0	
Vacancy Occasionals Agency TP Support Count	Commer Family Name FOMCR_1 View Former Family Name(5) N Number Gender Date of Birth Ethric Code Dasability QT Status HLTA Status	(	Not Known Annual College Exit - Post G Annual College Exit - Post G Overseas Trained Teacher Pr Overseas Trained Teacher Program Graduate Teacher Programm Teach First Programme Motoal Recognition from NJ Flexible Rocores	ogramme it yet on Programme ne		<u> </u>		0 0 0 1 0	000000000000000000000000000000000000000
-Vacancy -Occasionals -Agency TP Support Count	Comme Family Name FORMER, 1 View Former Family Name(5) Ni Number Gender Date of Birth Ethnic Code Disability QT Status HLTA Status QT Status QT Status	(	Not Known Annual Collage Exit - Oradua Annuar College Exit - Post G Gerseas Trained Teacher Pr Overseas Trained Teacher Program Graduate Teacher Program Teach First Programme Montal Rearcelose from No	ogramme it yet on Programme ne			○ ○ ○ ○ ○ ○ ○ ○ ○ ○	0 0 0 1 0	000000000000000000000000000000000000000

Selecting Annual College Exit – Graduate Course from the list. The selected value will be displayed and the details will be saved. If data is entered rather than selected from a list, navigating to another field or hitting the return/enter key will save the data

Editing existing information will create a history record for the item that has been changed/added

Changed items are identified by an icon displayed in the 'History' column

ool Workforce Annual Collection	School Workforce Member - TDUSc	health						Drill Up	Error	
surce	School Workforce Member - TDUSC	hool10						A	(Notes	
CBDS Levels	Filter Teacher Number		·			1 F		✓ Re		0.
SchoolWorkforceModules	By: reacher Number	Family Name	Gender	✓ Date of Bir		QT Status				Go
School Workforce Member [7]	Teacher Number	Name		Gender	Date of Birth	QT Stat	25	Rule E	rrors	
-Given Name	9999999 9999998	SURNAME_1,NAME	1	Not Known	2000-10-01	True		2		
-Former Family Name	9999998	SURNAME_2,NAME SURNAME_3,NAME	2	Not Known Not Known	2000-10-02 2000-10-03	True		2		
Contract or Service	3333331	SURVANE_3, VANE		Not Known	2000-10-03	ince		p		-
-Additional Payment	And the second se							Errors		
Role	Data Item			Value			Errors	Queries	OK	Histo
Additional Payment	WORKFORCE MEMBER									
Absence	Staff Details									
Curriculum	Teacher Number		999999				0	0	0	
Qualification	Family Name		SURNAME_1				0	0	0	
LSubjects	Given Name									_
School	NAME 1									
	MIDNAME_1									
-Vacancy	View Given Name(s)									View
Occasionals	Former Family Name									
Agency TP Support Count	FORMER_1									
A	View Former Family Name(S)									View
	NI Number		0/999999C				0	0	0	
	Gender		Vot Known				0	0	0	
	Date of Birth		2000-10-01				1	1	0	
	Ethnic Code	1	WBRI - White - British				0	0	0	
	Disability		20				0	0	0	
	QT Status		Tout				0	1	0	-
	HLTA Status		True				-		0	
	QTS Route		Annual College Exit - Graduate Course				0	0	0	1.
			winual College Exit - Graduate Course				U.	· •	0.	View

Click on the 'History' icon for the 'QTS Route' item that we have just amended. Details of all changes made to the item are displayed (1 row per change), including the name of the user who made the change.

	Action	User	Start Date			End Date			
Filter By:	v								Go Reset
				-					
Action						Role		Date	
Update	Mutual Recognition from NI, Scotland or the EEA	Annual Coll-	ege Exit - Graduate Course	/	Username displayed here	Source	Department for Education	Date the change took p	ace
									0
				<u> </u>					

# **Errors**

When a return has been uploaded a number of validation checks are run against the data in that return and all errors and queries are highlighted in red against the relevant data item. There are different levels of errors, 'Return Level' and 'Data Item Level'

# **Total Return Errors**

MY DATA RETURN			
The status of your data return :	Amended_by_source		
Errors :	2	Queries : 2	OK Errors : 0

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, eg the school return must contain details on occasional teachers and a return-level error is generated if this information is missing

Return level errors are displayed and are accessible from the 'Header Information' screen

School Workforce Annual Collection - TE RETURN LEVEL ERRORS (Errors and queries asso		C	Errors Queries	<u>ОК</u> 0	Re	turn Level No 2.	tes
Data Item		Value		Errors	Errors Queries	OK	History
HEADER INFORMATION					auction		
Collection	School Workforce Census			0	0	0	
Year	2015			0	0	0	
Reference Date /iew Source Details	2015-11-05			0	0	0	View A

# **Data Item Level Errors and Queries**

Data item errors are highlighted against the item to which they relate. **All** data items that are part of a failed validation rule will contain an error marker, not only the item containing the potentially invalid value. Eg the rule that checks whether a person appears to be aged over 100 years compares the date of birth with the date of the census, so both items would be flagged if that validation failed, even though it is probably only the date of birth that is wrong.

From the Workforce Members screen, select the record, then click **View All** in the 'View Absence Details' row. Errors are displayed against the 'First Day' and 'Last Day' data items in the 'Errors' section of the screen.

School Workforce Member - TD	USchool10							Drill Up	Erro I Notes	
Filter By: Teacher Number	Family Name		Gender	✓ Date of Birth		QT Status		✓ Re	set	G
9999999 9999999 9999998 9999997	Nome SURNAME_1,NAM SURNAME_2,NAM SURNAME_3,NAM	E 2		Gender Not Known Not Known Not Known	Date of Birth 2000-10-01 2000-10-02 2000-10-03	T	T Status rue rue	Rule 8 2 3	TTOIS	
Data Item				Value			Errors	Errors Queries	ОК	-
WORKFORCE MEMBER Staff Details										
Teacher Number		9999999					0	0	0	
Family Name		SURNAME 1					0	0	0	
Former Family Name FORMER_1 View Former Family Name(S)										V
NI Number		XX9999999C					0	0	0	×
Gender		Not Known					0	0	0	-
Date of Birth		2000-10-01					1	1	0	
Ethnic Code		WBRI - White - E	hitish				0	0	0	
Disability		no					0	0	0	
QT Status		True					0	1	0	
HLTA Status		True					1	0	0	
QTS Route		Annual College E	xit - Graduate Course	8			0	0	0	/
View Contract/Agreement Details View Absence Details View Curriculum Details View Qualification Details									(	N N N N

Click on the red box in the row for 'Last Day'.

Absence - TDUSchool10					Drill Up	Error All Notes
Name SURNAME_1,NAME_1	NI Number XX9999999C	Eirst Day 2015-01-12	Last Day 2015-01-10	Absence Category Sickness	Rule 2	Errors
Data Item			Value		Errors Errors Queries	ОК
ABSENCE					Litors Queries	UN
First Day	2015-01-12				0	0
Last Day	2015-01-10				2	0
Working Days Lost					0	0
Absence Category	Sickness				1 0	0

#### An error report will be displayed

TDUScho	DI10 Error report on 25/08/2015 at 09:15		
Data Field	LastDayOfAbsence		
Priority	Errors		Count 2
Rule No.	Error Message		Notes
4940	Last Day of absence cannot be before First Day of absence	Details	×
4990	Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero.	Details	×
Page 1 of 1			1
Priority	Queries		Count 0
Rule No.	Error Message		Notes
Page 1 of 1			1
Priority	OK		Count 0
	Error Message Priority		Notes
Rule No. Page 1 of 1			

The report shows that 'Last Day of absence' cannot be before the 'First Day of absence'. To see all the data items that are possibly affected by this validation click on the **Details** button next to the error message.

0 Erro	r report on 25/08/2015 at 09:15		
LastDayOfAbsence			
Errors		$\frown$	Count 2
Error Message			Notes
ast Day of absence cannot be before First Day of absence		Details	×
Where Last Day of a sickness absence is provided then the number of Working Days Los	st must be greater than zero.	Detaile	X
			1
Queries			Count 0
Error Message			Notes
			1
ОК			Count 0
Error Message			Notes
	LastDayOfAbsence Errors Error Message Last Day of absence cannot be before First Day of absence Where Last Day of a sickness absence is provided then the number of Working Days Los Queries Error Message	LastDayOfAbsence Errors Error Message Last Day of absence cannot be before First Day of absence Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero. Queries Error Message OK	LastDay Of Absence Errors Error Message Queries Cror Message OK

The information will be displayed as hyperlinks on the right

TDUS chool to     Error report on 25/08/2015 at 09:27       Data Field     LastDay0/Absence       Priority     Errors       Count 2     Count 2       2010 Hz     Cinex Henses       640     Last Day of absence cannot be before First Day of absence       490     Where Last Day of a schness absence is provided then the number of Working Days Lost must be greater than zero.     Details     X       492     Where Last Day of a schness absence is provided then the number of Working Days Lost must be greater than zero.     Details     X
Data to:         Error Message         Network         Find Day           4440         Last Day of absence cannot be before Fins Day of absence         Details         N         Last Day         Details         N         Last Day         And Day         Last Day         Details         N         Last Day         Last Day         Details         N         Last Day         Last Day         Details         N         Last Day         Last Day
Asta         Day         Details         X         First Day           Asta         Day         Asta         Day         Last Day         Details         X           Asta         Day         Day         Lost must be greater than zero.         Details         X
4990 Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero. Details 🗙 Last Day
4990 Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero. Details X
Page 1 of 1
Priority Queries Count 0
Rube No. Error Message Notes Page 1 of 1
rage for t
Priority OK Count 0
Rule No. Error Message Priority Notes
Page 1 of 1

# **Correcting Errors**

Identify which of the fields contains the incorrect value and return to the screen that contains it by clicking on the field value in the details section. Change the mode of the form to 'Edit' and then click on the data item that needs to be changed

# **Viewing Errors and queries**

To view all errors and queries on the return click on the 'All Errors' button

hool Workforce Annual Collection	School Workforce Annual Collection - TDUS	ichool10						
ource -CBDS Levels	RETURN LEVEL ERRORS (Errors and queries associate	ed with this full return, not individual fields.)	Errors 0	Queries 1	<b>ОК</b> 0	Re	turn Level No 2	ões .
SchoolWorkforceModules School Workforce Member [7] Given Name	Data Item	Value			Errors	Errors Queries	ОК	History
-Former Family Name	HEADER INFORMATION Collection	School Workforce Census			0	0	0	-
Contract or Service	Year	2015			0	0	0	-
-Additional Payment	Reference Date	2015-11-05			0	0	0	1
-Role	View Source Details							View A
-Absence [2]								
-Curriculum -Qualification								
Subjects								
-Subjects School								

This will show you a list of all queries and errors. You can see the error number, message and also click on 'details' to see what data is not passing validation

You can click on the underlined data values to the right of the screen to be taken to that field in the return

TDUSchool1	0	Error report on 25/08/2015	at 09:39		Count 10		Return Details
Rule No.	Return Level	Error Message	Priority		Notes	Field	Value
4235Q		Person is not expected to have QT status and be under 21 years of age on ReferenceDate05/11/2015	Queries	Details		PersonBirthDate QTStatus	Oct 1 2000 12 00AM
4245		Person cannot be shown as having HLTA status and be under 18 on ReferenceDate05/11/2015	Errors	Details	X	Nationality	-
41600		Member of workforce with missing NI Number	Queries	Details	X		
6540Q	Y	At least one staff record in this school's return should show a role of Head Teacher or Executive Head Teacher	Queries		X		
4235Q		Person is not expected to have QT status and be under 21 years of age on ReferenceDate05/11/2015	Queries	Details	X		
4245		Person cannot be shown as having HLTA status and be under 18 on ReferenceDate05/11/2015	Errors	Details	X		
4235Q		Person is not expected to have QT status and be under 21 years of age on ReferenceDate05/11/2015	Queries	Details	X		
4245		Person cannot be shown as having HLTA status and be under 18 on ReferenceDate05/11/2015	Errors	Details	X		
4940		Last Day of absence cannot be before First Day of absence	Errors	Details	X		
4990		Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than z	ero Errors	Details	X		
Page 1 of 1					1		

# **Return Level notes**

If a notepad entry is not returned the EDD helpdesk will have to contact you for further information.

Please note from November 2015 it will only be 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.

hool Workforce Annual Collection Jource - CBDS Levels	School Workforce Annual Collection - TDUS RETURN LEVEL ERRORS (Errors and queries associat		Errors Queries	ОК	Re	sturn Level Not	05
-CIID'S Levels -SchoolWorkforceModules				9		2	/
School Workforce Member [7]	Data Item	Value		S 22 13	Errors		Histor
Given Name	HEADER INFORMATION			Errors	Queries	OK	10000
-Former Family Name	Collection	School Workforce Census		0	0	0	
-Contract or Service	Year	2015		0	0	0	
-Additional Payment	Reference Date	2015-11-05		0	0	0	
-Role	View Source Details						View /
-Absence (2) -Curriculum -Qualification -Subjects School -Vocanncy -Occasionalis							

Click add new note and type your note and the error number in the box provided– Do this for all queries/errors you need to provide extra information for

Note Page			
Notes - SchoolWorkforceCer User Role	Native ID	Date and Time	Back
Note Detail			Add New Note Routine Note
		^	
		v	
	 	~	

#### Click create.

Note Page	
Create New Note	
Type you notes in this box Create Cancel	
Crown copyright   Disclaimer   Privacy	

The note will be saved and a record row will be created showing who created the note and when.

Role     Organisation     Native ID       name     Source     Department for Education     001	Native ID Usite more
	^
	^
you notes in this box	^
<u>^</u>	

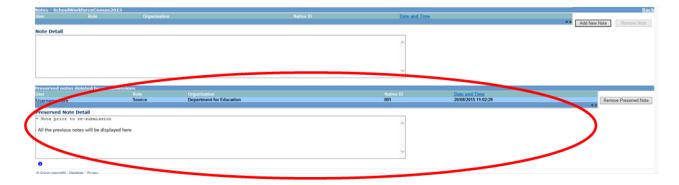
Return to the previous screen by clicking on 'back'

Note Page	msus2015					Back
User crutherford	Role Source	Organisation Department for Education	Hative ID 001	Date and Time 25/08/2015 11:36:43	Add New Note	Remove Note
Note Detail Type you notes in this bo	юж		^			

The pen icon will have changed to a notepad icon, which shows that the item has one or more notes attached to it. You are able to record notes in both **Edit** and **View** modes.

	All Emors All	Notes		Add	View	Edit De	lete Sta		
School Workforce Annual Collection - TDUS	ichool10					-	-		
DETLIDN LEVEL EDDODS /Errors and quarter associate	ad with this full ratura, not individual fields )	Errors	Queries	OK	R		stes		
RETORN LEVEL ERRORS (CHOIS and queries associati	eu wan diis ian ream, not mawaaan news.j	0	1	0	/				
					_		-		
Data Item	Value			Errors		OK	Histo		
HEADER INFORMATION				LIIOIS	aberres	on			
Collection	School Workforce Census			0	0	0			
Year	2015			0	0	0	-		
Reference Date	2015-11-05			0	0	0			
View Source Details							View		
	RETURN LEVEL ERRORS (Errors and queries associat Data frem HEADER REFORMATION Collection Year Reference Data	School Workforce Annual Collection - TDUSchool10 RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)  Data Item Value HEADER BF ORBATION Collection School Workforce Census Year 2015 Reference Data 2015 105 105 105 105 105 105 105 105 105	School Workforce Annual Collection - TDUSchool 10 RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)  Data Item Value HEADER REFORMATION Collection Year 2015 Reference Date 2015 Reference Date 2015 Collection Collecti	School Workforce Annual Collection - TDUSchool J RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)  Collection  Collection	School Workforce Annual Collection - TDUSchool JO         Owneries         Owneries         OX         OX <th colspan="2" o<="" td=""><td>School Workforce Annual Collection - TDUSchool10     Ernors     Owners     Other       RETURN LLYEL ERRORS (Ernors and queries associated with this full return, not individual fields.)     0     0     0       Data Item     Value     Ernors     Collection       PEADER NF ORMATION Collection     School Workforce Census     0     0       Year     2055     0     0       Reference Date     0511465     0     0</td><td>School Workforce Annual Collection - TDUSchool J0       RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)     Errors     Owneries     OK       Data Item     Value     Errors     Errors     Octoberies     OK       HE-DER INF ORDATION     School Workforce Census     0     0     0     0       Year     2015     0     0     0     0       Year     2015.105     0     0     0</td></th>	<td>School Workforce Annual Collection - TDUSchool10     Ernors     Owners     Other       RETURN LLYEL ERRORS (Ernors and queries associated with this full return, not individual fields.)     0     0     0       Data Item     Value     Ernors     Collection       PEADER NF ORMATION Collection     School Workforce Census     0     0       Year     2055     0     0       Reference Date     0511465     0     0</td> <td>School Workforce Annual Collection - TDUSchool J0       RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)     Errors     Owneries     OK       Data Item     Value     Errors     Errors     Octoberies     OK       HE-DER INF ORDATION     School Workforce Census     0     0     0     0       Year     2015     0     0     0     0       Year     2015.105     0     0     0</td>		School Workforce Annual Collection - TDUSchool10     Ernors     Owners     Other       RETURN LLYEL ERRORS (Ernors and queries associated with this full return, not individual fields.)     0     0     0       Data Item     Value     Ernors     Collection       PEADER NF ORMATION Collection     School Workforce Census     0     0       Year     2055     0     0       Reference Date     0511465     0     0	School Workforce Annual Collection - TDUSchool J0       RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)     Errors     Owneries     OK       Data Item     Value     Errors     Errors     Octoberies     OK       HE-DER INF ORDATION     School Workforce Census     0     0     0     0       Year     2015     0     0     0     0       Year     2015.105     0     0     0

Within the return level notes page is the preserved notes. If you need to upload the return at any time the notes already added will appear in this box.



# Submitting your return

Once the school is happy with their return they will need to submit it. Until the return has been submitted the Department for Education will not be able to approve the return; prior to submission they will only be able to view it **so it is important that the School, having corrected the errors remembers to go in and 'Submit' the return in order the Department can approve and authorise the return.** 

To submit the return, navigate to the school main screen by clicking on **Back to MyCOLLECT page** and click on the **Submit Return** button in the 'Return Management' section. The status of the return will change to 'Submitted'.

Y DATA RETURN				
he status of your	r data return : Amended_by_source			
	Errors : 5		Queries : 5	OK Errors : 0
at can I do with	n My Data Return?			
	Validate Return	Press this button to Validate your data retu	m	
	Upload Return from file	Press this button to Import a file into your d	lata return	
	Add Return on screen	Press this button to Add a new return using	a web form	
	Ones Behan	Press this button to Open your data return		
	Submit Return	Press this button to Submit your completed	data return	
	Export to the	Press this button to Export your data return	to a file	
	Launch Reports	Press this button to Report on your data ref	um	
	Run Matching	Press this button to match records from diff	erent sources in your return	
	Resolve Hatching	Press this button to manually match records	from different sources in your return	
	Run Reconciliation	Press this button to automatically reconcile	matched records	
	Resolve Reconciliation	Press this button to manually reconcile mate	ched records	
	Delete Return	Press this button to Delete your data return		
nat is happening	to My Data Return?			
	Data Return Submission		Data Return Approval	Data Return Authorisation
			Date Approved	Date Authorised

You will be asked to confirm this function,

Submit Return Confirmation							
Are you sure you wish to submit this Data Return?							
Yes 🖡 No	•						

Once you have submitted the button will be greyed out and the box "The status of your data return" will show as "Submitted" & the date will appear in the data submitted box in the "what is happening to my data return" section of the screen.

can I do with My Data Return?	Errors : 5	Queries : 5	OK Errors : 0				
Validate Return	_						
Upload Return from file	Press this button to Vali						
Add Return on screen.	Press dis buccon to imp	ort a file into your data return					
	Press this button to Add	a new return using a web form					
Open Return	Press this button to Ope	n your data return					
Submit Return	Press this button to Sub	mit your completed data return					
Export to file_	Press this button to Exp	ort your data return to a file					
Launch Reports	Press this button to Rep	ort on your data return					
Run Matching	Press this button to mat	ch records from different sources in your return					
Resolve Matching	Press this button to mar	ually match records from different sources in your return					
Run Reconciliation	Press this button to aut	Press this better to automatically records matched records					
Resolve Reconciliation	Press this button to mar	ually reconcile matched records					
Delete Return	Press this button to Dele						
s happening to My Data Return?	•						
Data Retu	rn Submission	Data Return Approval	Data Return Authorisation				
C	ed 25/08/2015	Date Approved	Date Authorised				

The Department will then approve and look at the data and authorise the return. Once these have been completed the subsequent dates will appear.

# Launching Reports

A number of reports are available on COLLECT, return to the **Source page** by selecting **Back to My Collect page** at the top of the page and click on the **Launch Reports** button

MY DATA RETURN				
The status of your data return : Submitte	bi			
	Errors : 5		Queries : 5	OK Errors : 0
What can I do with My Data Return?				
Validate Return		Press this button to Validate your data retu	n	
Upload Return from file_		Press this button to Import a file into your d	ata return	
Add Return on screen		Press this button to Add a new return using	a web form	
Open Return		Press this button to Open your data return		
Submit Return		Press this button to Submit your completed	data return	
aport to mean		Press this button to Export your data return	to a file	
Launch Reports	)	Press this button to Report on your data ret	um	
Run - Lorconaug		Press this button to match records from diff	erent sources in your return	
Resolve Matching		Press this button to manually match records	from different sources in your return	
Run Reconciliation		Press this button to automatically reconcile	matched records	
Resolve Reconciliation		Press this button to manually reconcile mate	hed records	
Delete Return		Press this button to Delete your data return		
What is happening to My Data Return?				
Data Return 5	Submission		Data Return Approval	Data Return Authorisation
Date Submitted	5/08/2015		Date Approved	Date Authorised
I need some help				

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

Report Launch

REPORT SELECTOR	
Reports	Report Description
Academy M8R Advice Missing Contracts Missing Payment Details for Contracts Notes Report Post Reconciliation Pre Reconciliation Reconciliation Queue	Please run this to identify if M&R is required and the current position through M&R. Note: Data from
Return Credibity Check     Return Credibity Check     School Error     Teacher Data Consistency     Teachers with Multiple Contracts	

# **Exporting reports**

Once you have clicked on the report you would like to run you will need to click on the Launch report button. This may take a while to run depending upon the amount of data.

REPORT SELECTOR		
Reports		Report Description
Missing Contracts	~	To show Staff Members with missing Contracts/Service Agreements. Please Note: Data from previous day
		Launch Report ,
0		
© Crown copyright   Disclaimer   Privacy		

#### From here, you will need to then select Launch reports again

Report Parameter Sele	on	
	Launch Report	
0		

You can export the data in various formats.

Missing Contracts Report								
14 4 1 of 1 ▷ ▷1 4	100%	Fin	nd   Next					
	Missing Con	tracts/Ser	vice Ag	XML file with report data CSV (comma delimited)				
	Local Authority	:		Acrobat (PDF) file MHTML (web archive) Excel	t Da	te:	25/08	3/2015
School	Estab No	Source	Seri	TIFF file Word		Date of	Birth	NI Number
Produced by COLLECT		Report Date	25/08/2015 14:	19-10			Page	1 of 1
0								
© Crown copyright   Disclaimer   Privacy								

The reports are run against a copy of the data as at close of play the previous day. If any data has been edited, deleted, inserted or reloaded since the data was copied, the report will not match the live data.

Once you have finished viewing the report, click on the 'Back to Reports' link at the top right hand side of the page. From here, select the 'Back to My COLLECT Page' to return back to your 'MySource' page.

# Exporting a data return

Once the data has been submitted you can produce an export. An export will show all data submitted in either XML format or CSV (spreadsheet). You can then save a hard copy of the submitted data for reference.

To export the data, click on the export to file button on the front screen.

MY DATA RETURN			
The status of your data return : Submitted			
Errors : 5		Queries : 5	OK Errors : 0
What can I do with My Data Return?			
Validate Return	Press this button to Validate your data ret	tum	
Upload Return from file	Press this button to Import a file into your	r data return	
Add Return on screen	Press this button to Add a new return usin	ng a web form	
Open Return	Press this button to Open your data return	n	
A CONTRACTOR INCOMENTAL	Press this button to Submit your complete	id data return	
Export to file	Press this button to Export your data retur	m to a file	
Launch Reports	Press this button to Report on your data n	return	
Run Hatching	Press this button to match records from di	ifferent sources in your return	
Resolve Matching	Press this button to manually match recon	ds from different sources in your return	
Run Reconciliation	Press this button to automatically reconcil	le matched records	
Resolve Reconciliation	Press this button to manually reconcile ma	atched records	
Delete Return	Press this button to Delete your data return	m	
What is happening to My Data Return?			
Data Return Submission		Data Return Approval	Data Return Authorisation
Date Submitted 25/08/2015		Date Approved	Date Authorised
I need some help			

The following screen will be displayed. Select the format for the export, CSV or XML then select the 'Export' button.

ted Source
t this data:
t this data:

Exporting (Processed 0 of 1)

EXPORT PROGRESS			
		Export in progress, please wait	s™∈.
			11/2
		Checking status for TDUSchool10 (0014009)	
Folder	Organisation Name	Native Id	
0			
© Crown convright Disclaimer	Deluce -		

Once this has run you will get an option to open or save the export.

Exporting as XML will generate a zip file containing the selected return data. Exporting as CSV generates a zip file containing CSV files that relate to how data is stored within COLLECT. Make your choice and click the 'Export' Button and follow the web browser prompts on screen.

The reports are run against a copy of the data as at close of play the previous day. If any data has been edited, deleted, inserted or reloaded since the data was copied, the report will not match the live data.

**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.

When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. Click on the **Open** button

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: https://collectdata.education.gov.uk Then select ok and ok. Alternatively you could try changing you security settings by

Going into the **Tools** menu option at the top of the screen, Select **Internet Options**, Select **Security**, Click on the **custom level** button, then make sure that **automatic prompting for file downloads** is set to **enabled** (it's a third of the way down the list)

Then try producing the export again and this time the Open/Save/Cancel dialogue box should appear

Click on the **Open** button to bring up the file details in Windows Explorer Double click on the folder **'EstabNo='** to open it; it contains the exported XML file, which you can double click to display the data

🖳 WinZip - C File Actions		de-Export.zip Jobs Optior								
New New	Open	Favorites	Add	Extract	الکی Mail	Encrypt	View	CheckOut	<b>Wizard</b>	View Style
Address \								•	1	۵ ۲ 🖽 🍯
Folders [Current-E Details EstabN			×	Name		99				Folc Folc
				•		III				+
Selected 0 files	, 0 bytes				Total 2 file	s, 6KB				0

Exports can also be provided in CSV format. Select 'Export as CSV' and when the **Save** and **Open** options appear click on the **Open** button

New Open Favorites	Add Extract Mail Encrypt View CheckOut Wizar	d View Style				
Address \					•	🔁 🤌 🔛 🖽 🖕 🗀
Folders	× A Name	Туре	Modified Siz	e Ratio	Packed	
[Current-Blade-Export.zip]	Details	Folder	25/08/2015 14:40			
鷆 Details	Blade-Export_25-08-2015_absence.csv	Microsoft Ex	25/08/2015 14:40 29	9 32%	204	
	Blade-Export_25-08-2015_additionalpayment.csv	Microsoft Ex	25/08/2015 14:40 15:	1 34%	99	
	Blade-Export_25-08-2015_agencytpsupport.csv	Microsoft Ex	25/08/2015 14:40 22	5 25%	169	
	Blade-Export_25-08-2015_cbdslevels.csv	Microsoft Ex	25/08/2015 14:40 192	2 25%	144	
	Blade-Export_25-08-2015_contractorservice.csv	Microsoft Ex	25/08/2015 14:40 1,14:	1 56%	502	
	Blade-Export_25-08-2015_curriculum.csv	Microsoft Ex	25/08/2015 14:40 12	2 25%	92	
	Blade-Export_25-08-2015_formerfamilyname.csv	Microsoft Ex	25/08/2015 14:40 43	5 37%	274	
	Blade-Export_25-08-2015_givenname.csv	Microsoft Ex	25/08/2015 14:40 744	4 52%	357	
	Blade-Export_25-08-2015_la.csv	Microsoft Ex	25/08/2015 14:40 94	4 29%	67	
	Blade-Export_25-08-2015_occasionals.csv	Microsoft Ex	25/08/2015 14:40 23	34%	152	
	Blade-Export_25-08-2015_qualification.csv	Microsoft Ex	25/08/2015 14:40 12		92	
	Blade-Export_25-08-2015_role.csv	Microsoft Ex	25/08/2015 14:40 559		333	
	Blade-Export_25-08-2015_roleadditionalpayment.csv	Microsoft Ex	25/08/2015 14:40 144	5 37%	92	
	Blade-Export_25-08-2015_school.csv	Microsoft Ex	25/08/2015 14:40 21		160	
	Blade-Export_25-08-2015_schoolworkforceannual.csv	Microsoft Ex	25/08/2015 14:40 225		169	
	Blade-Export_25-08-2015_schoolworkforcemember.csv	Microsoft Ex	25/08/2015 14:40 76		367	
	Blade-Export_25-08-2015_schoolworkforcemodules.csv	Microsoft Ex	25/08/2015 14:40 18		112	
	Blade-Export_25-08-2015_source.csv	Microsoft Ex	25/08/2015 14:40 310		230	
	Blade-Export_25-08-2015_subjects.csv	Microsoft Ex	25/08/2015 14:40 10		72	
	码 Blade-Export_25-08-2015_vacancy.csv	Microsoft Ex	25/08/2015 14:40 26:	1 25%	196	

# Matching and reconciliation

IMPORTANT INFORMATION: You only need to complete matching and reconciliation if you have uploaded data from two separate sources e.g. staff information from the MIS and pay details from your HR system.

There are four stages to this process:

Run Matching Resolve Matching Run Reconciliation

**Resolve Reconciliation** 

This process allows Academies who have more than one return to merge the data from the multiple returns thereby creating one return only per school. Academies that only have one return do not need to run M & R.

# IMPORTANT INFORMATION: The guidance below is provided due to issues that arose around M & R in previous collections.

- After completing Matching and Reconciliation the return should be 're-validated'. Do this by going to the main source data return page and selecting the 'Validate Return' button. This will remove all the errors associated with the original partial returns and re-validate the data in the 'Master Collect' return.
- 2. Issues with data Some returns had multiple records with very similar or the same data in them. For example curriculum records with the same Year Group and Subject and multiple contract records which had the same role and post and overlapping start and end periods. The M & R process does not handle these as they would seem to be duplication in the original data from the MIS system. If the Academy experience this then they should investigate why these are occurring in the XML file before trying to complete the M & R process. Reason being that they might need to produce new XSLT files from their MIS to eliminate these duplicates and then run M & R against the new files. This was typically occurring on Contract, Curriculum and Absence records
- 3. Once the process of M & R has been started or is part way through i.e. return has been matched but not yet reconciled, **then the data in the original returns and the master collect returns should not be edited or records added or deleted** as these will corrupt the M & R process. If it is necessary to add, edit or delete data then the user should go back and amend the original return data and then rerun M & R on the amended return.

- 4. If this is not done then sometimes after running reconciliation the return will have a status of 'Reconcilation\_Failed'. If this happens then re-run matching again, resolve any outstanding matches and then re-run reconciliation.
- 5. To help Academies Identify what stage their return is at a number of new reports have been provided. These are only relevant for academies using M & R and we would not recommend that these are run by Academies who do not use M & R. Please see details on M & R reports at the end of this section.
- 6. Matching functionality will only be available on academies with more than one return associated with it.
- 7. Reconciliation' functionality will only be available when more than one return for that school has been uploaded and matching has been successfully completed on that return.
- 8. Please note when matching, if one return has blanks, or NOBT in a field e.g. QTS Route, Ethnic Code, Disability and the other return has these fields populated then the 'Master Collect' return will be populated with the valid values rather than the nulls or 'NOBT' values.
- 9. After M & R has been successfully completed there should only be one visible source in COLLECT. This should be 'Collect Master' source. If there is still more than one source then M & R has not yet been fully completed.
- 10. **WARNING:** If a return has already been reconciled, re-running the matching again will undo any reconciliation action previously taken.
- 11. Whenever contract data is supplied then the post and allowance data should also be supplied alongside the contract data in the same return. If some contract information comes in on one return and post and allowance information comes in on another return then this can result in two contract records being generated even after matching and reconciliation.

# Matching

Matching is the first part of the M & R process and is concerned with identifying and matching the data at staff member level. Staff members will only be matched using a predefined set of business rules (see Annex A). Using these rules the majority of the staff workforce members will be matched but a few will need to be matched manually if some of the key id fields vary so the system cannot be certain that two or more member records are the same person.

Returns for a school should have a status of submitted or amended by source in order to run Matching.

To run matching, go into the source page and select the 'Run Matching' button

	Errors :	30 Queries : 9	OK Errors : 0
at can I do v	vith My Data Return?		
	Validate Return	Press this button to Validate your data return	
	Upload Return from file	Press this button to Import a file into your data return	
	Add Return on screen	Press this button to Add a new return using a web form	
	Open Return	Press this button to Open your data return	
	Submit Return	Press this button to Submit your completed data return	
	Export to file	Press this button to Export your data return to a file	
	Launch Reports	Press this button to Report on your data return	
	Run Matching	Press this button to match records from different sources in your return	
	Resolve Matching	Press this button to manually match records from different sources in your return	
	Run Reconciliation	Press this button to automatically reconcile matched records	
	Resolve Reconciliation	Press this button to manually reconcile matched records	
	Delete Return	Press this button to Delete your data return	

Highlight the school and selected the 'Add' button.

SELECT SOURCES TO M	ATCH	
AVAILABLE SOURCES FOR	MATCHING	
Available Sources	T0USdwo10	Add Zal
Selected Sources	Ran Hatching	Remove Remove All

This will move the school highlighted across to the right hand box. Then select the 'Run Matching' button

ECT SOURCES TO MA		
ABLE SOURCES FOR 1	MATCHING	
wailable Sources		Add
ected Sources	TD05cheel0	Remove
		Remove All
	Ren Hatching	

By selecting this button you will have started the matching process for the return. The user will be returned to the source screen and the matching process will be queued. The status of the return will allow you to see the stage the return is at in the process

# Status of Return during Matching Process

'Awaiting\_Matching' - the return has been marked ready for matching but is still in a queue waiting for the matching process to start.

'Matching\_in\_Progress' - This is when the matching is actually being completed on that return. While the return has this status then a user cannot view or edit that return.

'Matching\_Failed' - This is when the matching process has failed to complete. In these cases then matching will need to be rerun.

'Amended\_By\_Source' - the matching has been completed and is now ready for the user to check whether a records need to be manually matched.

# **Rules for Matching**

Please refer to Annex A for more detail on the rules used for producing the matches. Matching will be performed at Staff Details level i.e. identifying whether the individual staff members are the same individual or could be the same individual. There are two levels of matching, automatic and manual.

Automatic Matches – no manual intervention is required, the record will be marked as a match and resolved

Potential Matches – Will need to be maually matched

No Match Identified – There are no matching records

## **Resolve Matching**

Once the Matching has been run and the 'Amended\_By\_Source' is shown as the status you will need to resolve any records not automatically matched. Click on the Resolve Matching button to run this

MY DATA RETURN				
The status of you	ir data return : Amended_by_source			
	Errors : 30		Queries : 9	OK Errors : 0
What can I do wit	th My Data Return?			
	Validate Return	Press this button to Validate your data return		
	Upload Return from file	Press this button to Import a file into your data	a return	
	Add Return on screen	Press this button to Add a new return using a	web form	
1	Open Return	Press this button to Open your data return		
	Submit Return_	Press this button to Submit your completed da	ta return	
	Export to file	Press this button to Export your data return to	a file	
	Launch Reports	Press this button to Report on your data return	3	
		Press this button to match records from different	ant sources in your return	
	Resolve Hatching	Press this button to manually match records fr	om different sources in your return	
1.	RUB RECORDERING	Press this button to automatically reconcile ma	atched records	
	Resolve Reconciliation	Press this button to manually reconcile matche	d records	
	Delete Return	Press this button to Delete your data return		
What is happening	g to My Data Return?			
	Data Return Submission		Data Return Approval	Data Return Authorisation
	Date Submitted		Date Approved	Date Authorised
I need some help				
For help while in the	data collection pages, please use the link at	the top of the pages.		
For further help pleas	se contact the help desk on 01325 392626 ar	id select Option 1, or dsg.helpdesk@education.gsi.g	sw.uk	

# **Automatic Matches**

The example below shows where there are two records one from each return which can be automatically matched as they match on a number of 'key' fields. The given name and NI number are different but teacher number, family name and DOB all match. So this will result in one individual going through to reconciliation rather than two. Please see example below.

TDUSchool10				Select mat	tch type: Automati	c Matches	~			
Automatic Matches										No of Automatic Match
AUTOMATICALLY MATCHED DATA IT	EMS									
First record in set 9999999: SURNAME_1, NAME_1 - 0 999998: SURNAME_2, NAME_2 - 01/1 9999997: SURNAME_3, NAME_3 - 01/1 Page 1 of 1 MATCHES FOR THIS DATA ITEM	0/2000						No of record 2 2 2	ls in set		
Result         Teacher Number           Match - 1         9999999           Match - 1         9999999	Family Name SURNAME_1 SURNAME_1	Given Name(s) NAME_1, MIDNAME_1 NAME_1, MIDNAME_1	Former Family Name(s) FORMER_1 FORMER_1	Date of Birth 01/10/2000 01/10/2000	Gender Not Known Not Known	NI Number XX999999C XX999999C	LA No 001 001	Estab No 4009 4009	Software Code SWF Convertor SWF Convertor2	Source Level School School
Crown copyright   Disclaimer   Privacy			Flip All Match	Results Update Mate	ches					

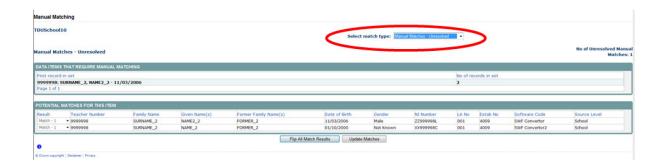
The user does not have to take any action on these matches unless they do not want them to be a match.

AUTOMATICALLY	MATCHED DATA ITE	MS									
9999998: SURNAM	t ME_1, NAME_1 - 01 ME_2, NAME_2 - 01/10 ME_3, NAME_3 - 01/10	/2000						No of record 2 2 2	s in set		
Result 1 Match - 1 199	HIS DATA ITEM	Family Name SURNAME_1 SURNAME_1	Given Name(s) NAME_1, MIDNAME_1 NAME_1, MIDNAME_1	Former Family Name(6) FORMER_1 FORMER_1	Date of Birth 01/10/2000	Gender Not Known	NI Number xx999999C xx999999C	LA No 001 001	Estab No 4009 4009	Software Code SWF Convertor SWF Convertor2	Source Level School School

If user decides that these are in fact not a match then they can change the result from 'Match – 1' to 'No match' by either using the 'Flip all match results' button or change each line by selecting from the 'Result' column, then select the 'Update Matches'. This will result in two workforce members going through to reconciliation rather than one.

## Manual Matches

If there are records which match on a few of the key ID fields eg Teacher Number, family name, DOB, NI Number but not enough of them then they will be identified in the 'Manual Matches – unresolved' as COLLECT does not know whether to treat them as one person or not so the user has to resolve these, please see example below.



If these are the same person then select 'Update Matches' and that will treat them a one individual, if user selects 'Flip all match results' button and set them to no match then that will be treated as two none matching individuals.

## Reconcilliation

The aim of reconciliation is to allow the system to decide how to process more than one set of data for a school e.g. should the records be merged and which records should be merged and which kept separate. Data reconciliation will be performed automatically using a set of predefined business rules (please see Annex B): however there is also a requirement for manual reconciliation where data differences across records cannot be resolved automatically.

Unlike Matching which is just done at 'Workforce member' level reconciliation is carried out at record level for example all the 'curriculum' records for an individual will be reconciled, 'absences' records for an individual will be reconciled.

To run reconciliation, select the 'Run Reconciliation' button from the source screen. Schools will only be included in the picklist of schools to reconcile if they have more than one return and matching has been run and all manual matches have been be resolved. If return has a status of 'Matching\_Failed' then again Matching will have to be rerun before reconciliation can be run.

e status of your data return : An	nended_by_source		
	Errors : 30	Queries : 10	OK Errors : 0
at can I do with My Data Return?			
Validate Return	Press this	tton to Validate your data return	
Upload Return from	Ne Press this	tton to Import a file into your data return	
Add Return on scree	en Press this	tton to Add a new return using a web form	
Open Return	Press this	tton to Open your data return	
Submit Return	Press this	tton to Submit your completed data return	
Export to file	Press this	tton to Export your data return to a file	
Launch Reports.	- Press this	tton to Report on your data return	
Run Hatching	Press this	tton to match records from different sources in your return	
Resolve Hatchin	Press this	tton to manually match records from different sources in your return	
Run Reconciliatio	Press this	tton to automatically reconcile matched records	
Resolve Reconcilia	tion Press this	tton to manually reconcile matched records	
Delete Return	Press this	tton to Delete your data return	
at is happening to My Data Return	n?		
Data Re	turn Submission	Data Return Approval	Data Return Authorisation
Date Subm	ittad	Date Approved	Date Authorised

#### **Reconciliation (Running)**

Once all the manual matches on a return have been resolved then the user can go on and run 'Reconciliation' against that return.

SELECT SOURCES TO RI	CONCILE	
AVAILABLE SOURCES FOR	RECONCILIATION	
Available Sources	TDUSchool 0	Add NB
Selected Sources	Run Recordation	Remove All
	kus Reconciliation	

Highlight the School, click add and then select the 'Run Reconciliation'.

SELECT SOURCES TO RE	CONCILE	
AVAILABLE SOURCES FOR	RECONCILIATION	
Available Sources		Add All
Selected Sources	TDU5dwdg0	Remove Remove All
0 8 Crown copyright   Declaimer   Privacy	Ram Recorditation	

This will start the reconciliation process which will now run in the background so a number of schools can be run overnight and will then be ready to work on the next day. Use the status of the return to identify whether reconciliation has been run successfully or not.

'Awaiting\_Reconciliation' - when the return has been placed in the reconciliation queue but reconciliation has not yet been completed.

Reconciliation\_in\_Progress'. - when the return has reached the top of the reconciliation queue and is currently being reconciled.

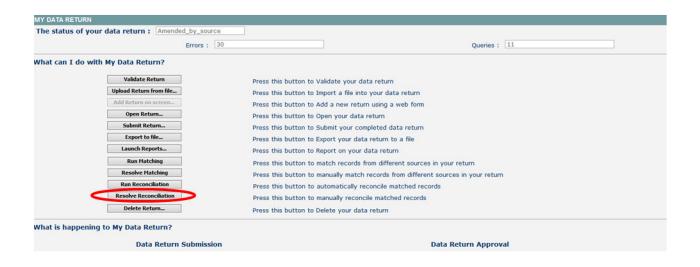
'Reconciliation\_Failed'. - shows that there has been an error during the reconciliation process. This can be caused because the return has been editing between matching being completed and reconciliation being run and unresolved matches have been generated. These need to be resolved before reconciliation should be re-run.

'Amended\_By\_Source' - the reconciliation has been completed and is now ready for the user to check whether all records have been automatically reconciled or whether some need to be manually reconciled

While the process of reconciliation is being carried out on the return then the user will not be able to added/edit/delete.

## **Resolve Reconciliation**

Once the reconciliation has been run and the 'Amended\_By\_Source' is shown as the status you will need to resolve any records not automatically reconciled. Click on the resolve reconciliation button to run this.



# **Reconciliation Business Rules**

To be able to combine multiple records into one record, the SWF Collect system uses defined business rules (please refer to Annex B) to determine when these can be reconciled automatically and when they have to reconciled manually.

When the return status returns to Amended\_By\_Source then the user's needs to go in and check the results of the reconciliation. To go in and check the result of the reconciliation select the 'Resolve Reconciliation' button. The following screen will appear

and you have the choice of checking the 'Reconciled Records' or the 'Unreconciled Records'.

TDUSchool10	Select reconciliation () Reconds	
	Select record type: SchoolWorldorceMember (1) V	
Unreconciled SchoolWorkforceMember Recon	rds No of Unree	conciled Records: 1
SCHOOLWORKFORCEMEMBER DETAILS		

There is no action required on the 'Reconciled Records' as these are the ones that COLLECT has been able to automatically reconcile. The number in brackets is the number of records which were reconciled.

RKFORCEMEMBER RECORDS I           rce_tevel         TeacherNumber           sol         9999997           sol         9999996           sol         9999999           sol         9999999           sol         9999999	IN MAST & RETURN Person SumilyName SURNAME_1 SURNAME_1 SURNAME_1	RoleAdditionalPa Curriculum (0) Qualification (0) Absence (0) XX9999999	arrei M	ersonBirthDate 01/10/2000 08/03/2001 01/10/2000	Ethnicity WBRI - White - British WBRI - White - British WBRI - White - British	No No No	y OTStatus True True True	HLTAStatus True True True	OTSRoute Mutual Recognition from N Mutual Recognition from NI, Mutual Recognition from NI,	Scotland or the EEA
(SOURCE)									Potoal Net ognition from NI,	Scotland or the EEA
Source Level N/A	Estab 4009	SoftwareCo COLLECT Sys		Release	SerialNo 1	DateTime 27/08/2015 10	24:01		LA SWF LA 1	SourceLevel School
MBER DETAILS FOR FIRST SOU	RCE RECORD SHOWN BE	ELOW								
rce Level TeacherNumber ol 9999997	PersonFamilyName SURNAME_3	NINumber	GenderCurrent Not Known	PersonBirthDate 01/10/2000	Ethnicity WBRI - White - British				QTSRoute Mutual Recognition from NI, Sci	otland or the EEA
MASTER RECORD										
rce Level TeacherNumber ol 9999997 ool 9999997	PersonFamilyName SURNAME_3 SURNAME_3	NINumber	GenderCurrent Not Known Not Known	PersonBirthDate 01/10/2000 01/10/2000	Ethnicity WBRI - White - British WBRI - White - British	No	True	True	QTSRoute Mutual Recognition from NI, So Mutual Recognition from NI, So	
ice M	N/A ER DETAILS FOR FIRST SOU Level TeacherNumber 9999997 ASTER RECORD Level TeacherNumber 9999997	N/A         4009           ER DETAILS FOR FIRST SOURCE RECORD SHOWN B         PersonFamilyName           1 Evel         Teacherhumber         PersonFamilyName           999997         SURVAME_3           ASTER RECORD         Level           1 Evel         Teacherhumber         PersonFamilyName           999997         SURVAME_3           Level         Teacherhumber         PersonFamilyName           999997         SURVAME_3	N/A 4009 COLLECT Sy ER DETAILS FOR FIRST SOURCE RECORD SHOWN BELOW Level Teacherhumber Personf amilyName SURNAKE_3 ASTER RECORD Level Teacherhumber Personf amilyName 9999997 SURNAKE_3	N/A         4009         COLLECT System           ER DETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         Exectle Support         Kilkumber         CenderCurrent           1Level         Teacherhumber         PersonFamilyName         Kilkumber         Net Known           ASTER RECORD         Level         Teacherhumber         PersonFamilyName         Net Known           Level         Teacherhumber         PersonFamilyName         Nithumber         CenderCurrent           Level         Teacherhumber         PersonFamilyName         Nithumber         GenderCurrent           999997         SURNAME_3         Nithumber         GenderCurrent         Not Known	N/A         4009         COLLECT System           ER DETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         Exected analytame         Kilkumber         PersonFamilytame           1 Evel         Teacherhumber         PersonFamilytame         Kilkumber         KenderCurrent         PersonFamilytame           ASTER RECORD         Evel         Teacherhumber         PersonFamilytame         Nilkumber         Net Known         01/10/2000           Level         Teacherhumber         PersonFamilytame         Nilkumber         GenderCurrent         PersonFamilytame           1 Evel         Teacherhumber         PersonFamilytame         Nilkumber         GenderCurrent         PersonFamilytame	N/A         4009         COLLECT System         1           ERD BETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         Execution of the second shown below below of the second shown below	N/A         4009         COLLECT System         1         27/08/2015 10           ERD ETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         Execution         Ethnicity         Disability           Level         Teacherthumber         PersonFamilyName SURVAME_3         NitNumber         CenderCurrent Not Known         PersonFirthDate         Ethnicity         Disability           ASTER RECORD         Ethnicity         Disability         Not Known         01/10/2000         WBRI - White - British         No           Level         Teachertumber         PersonFamilyName SURVAME_3         Nithumber         CenderCurrent Not Known         PersonFirthDate         Ethnicity         Disability	N/A         4009         COLLECT System         I         27/04/2015 10:24:01           ERD ETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         Experiment of the second shown below         Ethnicity         Disability         QTStatus           Level         PersonFamilyName         NNumber         GenderCurrent         PersonBirthDate         Ethnicity         Disability         QTStatus           ASTER RECORD          No         True         No         True           1         PersonFamilyName         NUMmber         GenderCurrent         PersonBirthDate         Ethnicity         Disability         QTStatus           ASTER RECORD          No         Number         GenderCurrent         PersonBirthDate         Ethnicity         Disability         QTStatus           999997         SURNAME_3         NUMmber         GenderCurrent         PersonBirthDate         Ethnicity         Disability         QTStatus           999997         SURNAME_3         NUMmber         GenderCurrent         PersonBirthDate         Ethnicity         Disability         QTStatus	N/A         4009         COLLECT System         1         27/08/2015         10:24:01           ERD BTAILS FOR FIRST SOURCE RECORD SHOWN BELOW         ERDETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         Ethnicity         Disability         QTStatus         H_TAStatus           1 Level         Tracher/tumber         PersonFamilyName         NIMmer         GenderCurrent         PersonFamilyName         Disability         QTStatus         H_TAStatus           ASTER RECORD          Not Known         Disability         Disability         QTStatus         H_TAStatus           1 Level         Tracher/tumber         PersonFamilyName         NUmmer         GenderCurrent         PersonFirthDate         Ethnicity         Disability         QTStatus         H_TAStatus           ASTER RECORD         Ethnicity         Disability         QTStatus         H_TAStatus         H_TAStatus           9999997         SURSUME_3         Not Known         Dij10/2000         WREI - White - British         No         True         True	N/A         4009         COLLECT System         1         27/08/2015 10:24:01         SWF LA 1           EER DETAILS FOR FIRST SOURCE RECORD SHOWN BELOW         EEDDATULS FOR FIRST SOURCE RECORD SHOWN BELOW         Ethnicity         Disability         QTStatus         HLTAStatus         QTSRoute           1. Level         Traccherthumber         PersonFamilyName         Not Known         0.1/02/000         WRI - White - Bitsish         No         True         HLTAStatus         QTSRoute           ASTER RECORD         Ethnicity         Disability         QTStatus         HLTAStatus         QTSRoute           Level         Tracherthumber         PersonFamilyName         NBumber         GenderCurrent         PersonFamilyName         QTSRoute           ASTER RECORD         Ethnicity         Disability         QTStatus         HLTAStatus         QTSRoute           1         Tascherthumber         PersonFamilyName         Not Known         0.1/10/2000         WRI - White - British         No         True         Mutual Recognition from NI, So

Unreconciled Records – These are records than cannot be resolved using the predefined business rules. In these cases the user has to make decisions as to which data should be included in the 'Master' record.

fDUSchool10 Select reconciliation type	Unreconciled Records V						
Select record type Jnreconciled SchoolWorkforceMember Records	SchoolWorkforceMember (1) GivenName (0) ContractOrService (0) AdditionalPayment (0) Role (0)				No	o of Unreconcil	ed Records:
SCHOOLWORKFORCEMEMBER DETAILS Software Code Source Level TeacherNumber PersonFamilyNomr SWF Convertor2 School 9999998 SURNAME_2	RoleAdditionalPayment (0) Curriculum (0)	rrent Person 01/10/	<u>Ethnicity</u> WBRI - White - British	<u>Disability</u> No	<u>OTStatus</u> True	<u>HLTAStatus</u> True	OTSRoute Mutual Recognition from NI, Scotland or the EEA

The user should work down the list of record types, reconciling the SchoolWorkforceMembers first, then the 'GivenName' then the ContractorService' and so on

)USchool10		Selec	Select record type:	Unreconciled Records V							
nreconciled Sch	oolWorkforceMe	ember Records	(	GivenName (0) ContractOrSenice (0) AdditionalPayment (0) Role (0) RoleAdditionalPayment (0)				N	o of Unreconci	led Records: 1	
CHOOLWORKFO	CEMEMBER DET	AILS		Curriculum (0)							
Software Code SWF Convertor2 Page 1 of 1	Source Level School	TeacherNumber 9999998	PersonFamilyNam SURNAME_2	Qualification (0) Obsence (2)	sonBirthDate 10/2000	Ethnicity WBRI - White - British	Disability No	OTStatus True	HLTAStatus True	OTSRoute Mutual Recognition from NI,	Scotland or the EEA
PARENT MASTER F	ECORD (SOURCE	)									
		Source Level	Estab	SoftwareCode	Release	SerialNo	DateTime			LA	SourceLevel
Software Code		N/A	4009	COLLECT System			27/08/2015 10:24:	-01		SWF LA 1	School

If we look at this example of a workforce member that needs manual reconciling. The bottom half of the screen shows that there is a workforce member record, which has some of the same information and some different. The different fields are and NINumber, GenderCurrent and PersonDateBirth.

DUSchool10		:	Select reconciliatio Select recon	n type: Unreconcile d type: SchoolWork									
Inreconciled Sch	hoolWorkfor	ceMember Record	s							N	o of Unreconcil	ed Records: 1	
SCHOOLWORKFO	RCEMEMBER	DETAILS											
Software Code SWF Convertor2 Page 1 of 1	Source Le School	vel TeacherNum 9999998	ber PersonFam SURNAME_2					e - British	Disability No	<u>QTStatus</u> True	HLTAStatus True	OTSRoute Mutual Recognition from	m NI, Scotland or the EEA
Page 1 01 1													
PARENT MASTER	RECORD (SOU	RCE)											
Software Code		Source Level		itab Softwar		Release	SerialNo		teTime			LA	SourceLevel
N/A		N/A	4	009 COLLEC	T System		1	27/	08/2015 10:4	2:14		SWF LA 1	School
OSSIBLE SOURC	ES FOR MAST	ER RECORD											
Software Code	Source Level	TeacherNumber	PersonFamilyName	NINumber	GenderCurrent	PersonBirthDate	Ethnicity	Disability	от	Status	HLTAStatus	OTSRoute	
SWF Convertor2	School	9999998	SURNAME_2	XX999998C	Not Known	01/10/2000	WBRI - White - British	No	Tru	e	True	Mutual Recogn	ition from NI, Scotland or the EEA
SWF Convertor	School	9999998	SURNAME_2	ZZ999998L	Male	11/03/2006	WBRI - White - British	No	Tru	e	True	Mutual Recogn	ition from NI, Scotland or the EEA
		9999998	SURNAME_2	XX999998C 🗸	Not Known 🗠	01/10/2000 🗠	WBRI - White - British	No	Tru	2	True	Mutual Recognition	1 from I
			Update	Master									
0													
D Crown copyright   Discl	aimer   Privacy												

By selecting from the drop down options for these fields the user can select the values that will be included in the 'Master Collect' record, and then select the 'Update Master' button to save those selections

CHOOLWORKFO	ORCEMEMBER DE	TAILS										
Software Code SWF Convertor2 Page 1 of 1	Source Level School	TeacherNumber 9999998	PersonFamilyNam SURNAME_2	e <u>NINumber</u> XX999998C	GenderCurrent Not Known	PersonBirthDate 01/10/2000	Ethnicity WBRI - Whit		isability OTStatus lo True	HLTAStatus True	OTSRoute Mutual Recognition from NI,	Scotland or the EEA
ARENT MASTER	RECORD (SOURC	6)									12	(1) (1)
oftware Code //A		Source Level N/A	Estab 4009	SoftwareCode COLLECT System	n	Release	SerialNo 1	DateTin 27/08/2	me 2015 10:42:14		LA SWF LA 1	SourceLevel School
DSSIBLE SOURC	CES FOR MASTER	RECORD										
WF Convertor2	School 99	99998 SURN	AME_2 ZZ99	998C Not Kr 998L Male	nown 01/10 11/03	/2000 WB	nicity U - White - British U - White - British	Disability No No	QTStatus True True	HLTAStatu: True True	Mutual Recognition	from NI, Scotland or the EEA from NI, Scotland or the EEA

In the next example, this is where there are two 'Given name' entries for the workforce member. The middle part of the screen provides details of the workforce member, the bottom part of the screen show the two 'Given name' records.

		Select	reconciliation type:	Inreconciled Reco	rds 🗸							
			Select record type:	GivenName (1)	~							
nreconciled Give	nName Records									No of Unrecon	ciled Records: 1	
SCHOOLWORKFOR	CEMEMBER DETA	ILS										
Software Code COLLECT System Page 1 of 1	Source Level School	TeacherNumber 9999998	PersonFamilyName SURNAME_2	NINumber ZZ999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - White - British	<u>Disabili</u> No	ty <u>QTStatu</u> True	IS HLTAStatus True		ition from NI, Scotland or the EEA
PARENT MASTER R	ECORD (SCHOOLV	VORKFORCEMEMBER	۶)									
PARENT MASTER R Software Code COLLECT System	ECORD (SCHOOLV Source Level School	VORKFORCEMEMBER TeacherNumber 9999998	R) PersonFamilyName SURNAME_2	NINumber ZZ999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - White - British	Disability No	QTStatus True	HLTAStatus True	QTSRoute Mutual Recognitio	n from NI, Scotland or the EEA
Software Code	Source Level School	TeacherNumber 9999998	PersonFamilyName									n from NI, Scotland or the EEA
Software Code COLLECT System	Source Level School	TeacherNumber 9999998	PersonFamilyName					No	True	True Source Level	Mutual Recognitio	n from NI, Scotland or the EEA
Software Code COLLECT System POSSIBLE SOURCE Copy to COLLECT Ma	Source Level School S FOR MASTER RE	TeacherNumber 9999998	PersonFamilyName				WBRI - White - British Software Code SWF Convertor	No	True	True Source Level School	Mutual Recognitio	PersonGivenName NAME_2
Software Code COLLECT System POSSIBLE SOURCE Copy to COLLECT Me Copy to COLLECT Me	Source Level School S FOR MASTER RE	TeacherNumber 9999998	PersonFamilyName				WBRI - White - British	No	True	True Source Level	Mutual Recognitio	PersonGivenName

The user can either save both entries to 'Master Collect' by first selecting the 'Copy to COLLECT Master' button to save one entry.

DUSchool10			reconciliation type: U Select record type: @		ds V								
nreconciled Give	nName Records										No of Unrecond	iled Records: 1	
SCHOOLWORKFOR	CEMEMBER DETA	ILS											
Software Code COLLECT System Page 1 of 1	Source Level School	TeacherNumber 9999998	PersonFamilyName SURNAME_2	NINumber ZZ9999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - V	/ Vhite - British	Disability No	OTStatus True	HLTAStatus True		nition from NI, Scotland or the EEA
PARENT MASTER RE	ECORD (SCHOOLV	VORKFORCEMEMBER	र)	-14 - 15		0	6			31			
Software Code COLLECT System	Source Level School	TeacherNumber 9999998	PersonFamilyName SURNAME_2	NINumber ZZ999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - Whit	e - British				QTSRoute Mutual Recognitio	on from NI, Scotland or the EEA
POSSIBLE SOURCE	S FOR MASTER RE	CORD											
Copy to COLLECT Ma	atar							Software Code SWF Convertor2			Source Level		PersonGivenName NAME 2
Copy to COLLECT His								SWF Convertor			School		NAME2_2
		fitional given names o updating this record											NAME_2
•			Update Master										

Then select the 'Update Master' to save the second entry. The result of this is that the workforce member will have two 'Given name' records in the 'Master Collect' return

DUSchool10			reconciliation type:		ds V						
nreconciled Give	nName Records									No of Unrecond	ciled Records: 1
CHOOLWORKFOR	CEMEMBER DETA	ILS						1000000			
Software Code COLLECT System Page 1 of 1	Source Level School	TeacherNumber 9999998	PersonFamilyName SURNAME_2	NINumber ZZ999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - White - British	Disability No	QTStatus True	HLTAStatus True	OTSRoute Mutual Recognition from NI, Scotland or the EEA
ARENT MASTER R	ECORD (SCHOOLV	VORKFORCEMEMBER	0								
Software Code COLLECT System	Source Level School	TeacherNumber 9999998	PersonFamilyName SURNAME_2	NINumber 22999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - White - British			HLTAStatus True	QTSRoute Mutual Recognition from NI, Scotland or the EEA
POSSIBLE SOURCE	S FOR MASTER RE	CORD									
Software Code				Source Leve			Perso	onGivenName			
SWF Convertor			-	School			NAME				
		(	Update Master	)							

If the users only want to have one 'Given Name' entry included in the 'Master Collect' return then select the entry from the 'PersonGivenName' drop down list and the select 'Update Master' button.

DUSchool10		Selec	t reconciliation type:		ds V							
nreconciled Give	enName Records									No of Unreconci	led Records: 1	
CHOOLWORKFOR							and the second sec					
Software Code SWF Convertor Page 1 of 1	Source Level	TeacherNumber 9999998	PersonFamilyName SURNAME_2	NINumber ZZ999998L	GenderCurrent Male	PersonBirthDate 11/03/2006	Ethnicity WBRI - White - British	Disability No	OTStatus True	HLTAStatus	OTSRoute Mutual Recognition from NI, Scotland or th	the EEA
Software Code SWF Convertor Page 1 of 1	Source Level School	TeacherNumber 9999998		ZZ999998L								the EEA
Software Code SWF Convertor Page 1 of 1 PARENT MASTER R	Source Level School	TeacherNumber 9999998 WORKFORGEMEMBE	SURNAME_2	ZZ999998L								the EEA
Software Code SWF Convertor Page 1 of 1 PARENT MASTER R	Source Level School RECORD (SCHOOL	TeacherNumber 9999998 WORKFORGEMEMBE	SURNAME_2	ZZ999998L			WBRI - White - British		True	True Source Level	Hutual Recognition from KI, Scotland or ti PersonGivenName	the EEA
Software Code SWF Convertor Page 1 of 1 *ARENT MASTER R *OSSIBLE SOURCE Capy to COLLECT M	Source Level School RECORD (SCHOOL ES FOR MASTER R	TeacherNumber 9999998 WORKFORGEMEMBE	SURNAME_2	ZZ999998L			WBRI - White - British Software Code SWF Convertor		True	True Source Level School	Hetual Recognition from KI, Scotland or ti PersonCivenName NAME2_2	the EEA
Software Code SWF Convertor Page 1 of 1 PARENT MASTER R OSSIBLE SOURCE Capy to COLLECT M Capy to COLLECT M	Source Level School RECORD (SCHOOL ES FOR MASTER R Inster	TeacherNumber 9999998 WORKFORGEMEMBE	SURNAME_2	ZZ999998L			WBRI - White - British		True	True Source Level	Hutual Recognition from KI, Scotland or ti PersonGivenName	the EEA

In this final example there are two 'Additional Payment' records for a workforce member with exactly the same data in them from the same return. In this case there are no different values to pick from but the user must decide whether they should be treated as two separate

'Additional Payments' for the workforce member in which case they must use the 'copy to COLLECT master' and 'Update Master' buttons to take them both into 'Master Collect' return.

NT MASTER RECORD (CO	INTRACTORSERVICE) HA	S NOT BEEN CRE	ATED	
IBLE SOURCES FOR MAS	TER RECORD			
	Software Code	Source Level	PaymentType	PaymentAmount
Copy to COLLECT Master	csv A	School	Inner London Weighting (Support Staff)	1000.99
Copy to COLLECT Master	csv A	School	Inner London Weighting (Support Staff)	1000.99
			Inner London Weighting	1000.99

If they are genuine duplicates and only one 'Additional Payment' is required then just select the 'Update Master' and only one of the 'Additional Payment' will be copied across to the 'Master Collect' return

# Rolling back a manual reconciliation

If the user has incorrectly reconciled a record then they can undo the last reconciliation. To do this select 'Reconciled Records' from the drop down list on the 'Manual Reconciliation' screen.

		Select	reconciliation type: R	econciled Records	~						
			Select record type:	choolWorkforceMe	mber (4) 🗸		Undo Reconciliation				
econciled Schoo	WorkforceMem	ber Records								to of Reconcile	d Records: 4
ECONCILED SCH	DOLWORKFORCEN	MEMBER RECORDS IN	MASTER RETURN								
Software Code	Source Level	TeacherNumber	PersonFamilyName	NINumber	GenderCurrent	PersonBirthDate	Ethnicity	Disability	OTStatus	HLTAStatus	OTSRoute
	School	9999998	SURNAME_2	ZZ999998L	Male	11/03/2006	WBRI - White - British	No	True	True	Mutual Recognition from NI, Scotland or the EE
OLLECT System			CLUDDIAL AND A	XX9999999C	Not Known	01/10/2000	WBRI - White - British	No	True	True	Mutual Recognition from NJ, Scotland or the EEA
	School	9999999	SURNAME_1								the second
OLLECT System	School	9999999 9999996	SURNAME_1	22999999P	Female	08/03/2001	WBRI - White - British	No	True	True	Mutual Recognition from NI, Scotland or the EEA
COLLECT System COLLECT System COLLECT System COLLECT System					Female Not Known	08/03/2001 01/10/2000	WBRI - White - British WBRI - White - British	No	True	True	Mutual Recognition from NI, Scotland or the EEA Mutual Recognition from NI, Scotland or the EEA

Select the appropriate record type from the 'Select record type' drop down list and highlight the select the relevant record from the list of records which have been reconciled then select the 'Undo Reconciliation' button. The user can then work back reconciling more records if required.

When all the manual outstanding reconciliations have been resolved **remember you will need to revalidate the return after finishing your matching and reconciliation** 

e status of your	data return : Amended_by_source			
	Errors : 33		Queries : 11	OK Errors : 0
at can I do with	My Data Return?			
	Validate Return	Press this button to Validate your data reti	um.	
	Upload Return from file	Press this button to Import a file into your	data return	
	Add Return on screen	Press this button to Add a new return using	g a web form	
	Open Return	Press this button to Open your data return		
	Submit Return	Press this button to Submit your completed	i data return	
	Export to file	Press this button to Export your data retur	n to a file	
	Launch Reports	Press this button to Report on your data re	itum	
	Run Matching	Press this button to match records from di	fferent sources in your return	
	Resolve Matching	Press this button to manually match record	Is from different sources in your return	
	Run Reconciliation	Press this button to automatically reconcile	e matched records	
	Resolve Reconciliation	Press this button to manually reconcile mat	tched records	
	Delete Return	Press this button to Delete your data retur	n /	
t is happening t	to My Data Return?			
	Data Return Submission		Data Return Approval	Data Return Authorisation
	Date Submitted		Date Approved	Date Authorised

You should then be left with only be one return visible in the COLLECT system for the school, namely 'Collect System' return. If there are still more than one return then reconciliation has not been completed. You can run the Academy M&R Advice Report to determine this.

cademy M&R Advice	Report		
4 4 1 of 1 ▷ ▷	4 100% <b>V</b>	Find   Next 🔍 🗸 😨 (	<del>a</del>
	Matching & Reconcili	ation Advice	
LAEstab	School Name	Status	
0014009	TDUSchool10	M&R Completed	

Once you are happy with your data please remember to submit the data from your front screen.

# **Useful hints**

 VERY IMPORTANT - Re-submissions – if a data return for a school already exists in the system and you upload another file, it will overwrite the original return completely no matter where it is in the workflow (submitted or authorised). If you try to upload a file that is already in the system then you will be given the following message



- 2. We recommend that you take great care when selecting this option and make sure that all parties who may be working, or have worked on this return agree to the resubmission. When uploading a zip file containing many data then please be aware that you will not be prompted with the above message if any of the settings contained in the zip file are already on the system. It will automatically overwrite the return without warning you.
- 3. When navigating around the COLLECT system it is important that you use the COLLECT 'Drill up' button or COLLECT 'back' button which are toward the top right of your COLLECT screen. If the 'Drill up' or 'back' buttons are not visible then you may be in one of the earlier screens and to navigate back from here you will need to click 'Back to My COLLECT page' page located at the top of your COLLECT screen above your login name. You will be either given an error message or 'thrown' out of the system if you use your web browser back button.
- 4. When amending errors, once you have completed your actions on a particular error you will need to drill back out of that record to the main screen before being able to select another error to investigate. If you try to select an error and have found the error through the 'All Errors' page before drilling out you will be given the error message: 'Cannot choose another error to investigate'

# Help

COLLECT access is administered directly by academies for their users. This includes registering for COLLECT, activating your account and giving you access to specific collections. Please get in touch with the approver in your academy who will be able to make sure that you have the appropriate access.

If you are experiencing problems with COLLECT or have a data collection query, please submit a <u>service request</u> to the Data Collection Helpdesk.

If you are having problems logging into Secure Access, please refer to the 'Help' section on Secure Access. If you are still unable to resolve your issue, please submit a <u>service</u> <u>request</u> to the SA service desk.



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

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