



Department
for Education

School workforce census 2015: COLLECT guide for maintained schools

**Instructions for maintained 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', an 'agent' is someone who undertakes verification and checking of the data 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.

Secure access

[Forgotten username or password?](#)

 I agree to the terms of use

Welcome to Secure access

The Secure Access Portal allows registered users access to the Department for Education's systems. Access to systems are granted on an individual basis and therefore some systems may not be visible.

First time here?

[Visit the Secure Access Help page](#)

Announcements

12/08/2015

Essential Maintenance Work

Due to essential maintenance required on the Secure Access servers, the system will be unavailable on **Friday 21st August at 5pm** for one hour to allow Eduserv to complete the work.

If you are a new user and require access to COLLECT, you will need to speak to your Approver. Full Secure Access guidance is published on the [Secure Access Website](#).

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

Welcome to Secure access

Allowing registered users access to the Department for Education's systems. Access to systems are granted on an individual basis and therefore some systems may not be visible.

Need help?

[Visit the Secure access help page](#)

Your applications

COLLECT

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

Click the continue button.

Then click on to **'Continue'** to enter COLLECT

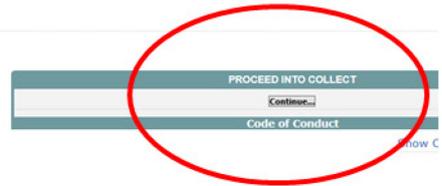
Collect Welcome

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

Important notice for users of Internet Explorer older than version 6.0.
The Department is performing necessary maintenance work on its IT servers on the 25th July. As a result of this work customers using browsers older than IE 6.0 will no longer be able to access Departmental systems and should upgrade their browser to a more recent version. We apologise for any inconvenience this may cause.

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

Scheduled Downtime
Please note: COLLECT will be unavailable from 17:00 to 17:30 on Tuesday 18th August for scheduled maintenance



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

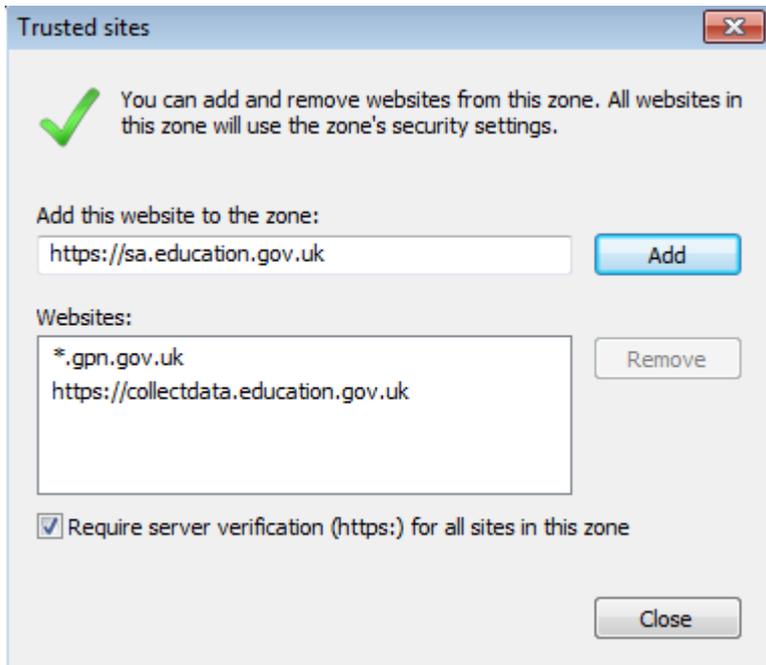
Go into the **'Tools'** menu option at the top of the screen.

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



Source Page Screen

The Source main screen will be displayed

MY DATA COLLECTIONS					
Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolWorkforceCensus2015	Source	Name of school	Open	Date census is due	

[Select Data Collection](#)

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 :

Errors : Queries : OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

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

I need some help

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

For further help please contact the help desk on 01325 392626 and select Option 1, or dsg.helpdesk@education.gsi.gov.uk

The screen is divided into three main sections:

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

Return Status

The status of your data return :

Errors : Queries : OK Errors :

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

What can I do with My Data Return?

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

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

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>
<input type="button" value="View submitted data return..."/>	<input type="button" value="View approved data return..."/>	<input type="button" value="View authorised data return..."/>
<input type="button" value="Export submitted data return..."/>	<input type="button" value="Export approved data return..."/>	<input type="button" value="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

What can I do with My Data Return?

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

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 several minutes. Please allow sufficient time to complete.

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.

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

FILE UPLOAD PROGRESS ...

Data return upload in progress, please wait....

Deleting existing data return



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.

MY DATA RETURN

The status of your data return : **Loaded_and_Validated**

Errors : Queries : OK Errors :

What can I do with My Data Return?

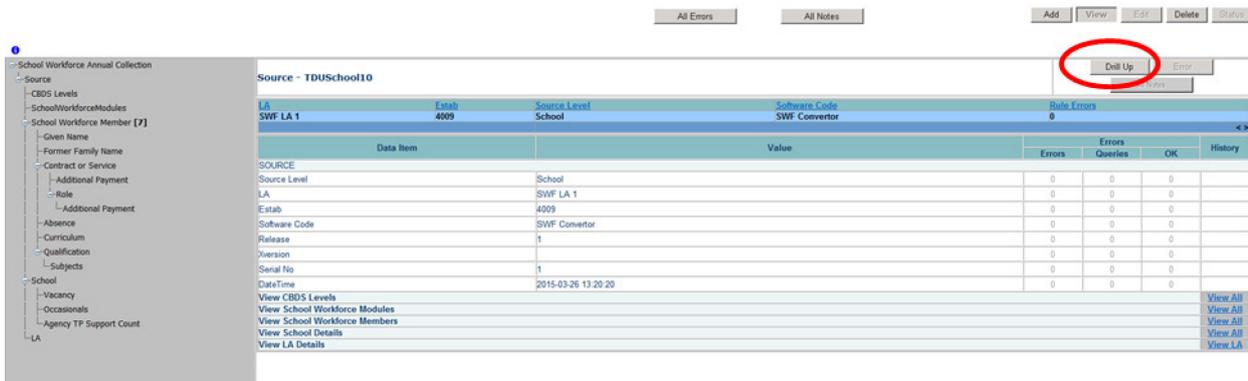
Upload Return from file...	Press this button to Import a file into your data return
Add Return on screen...	Press this button to Add a new return using a web form
Open Return...	Press this button to Open your data return
Submit Return...	Press this button to Submit your completed data return
Export to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

What is happening to My Data Return?

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

Screen Navigation

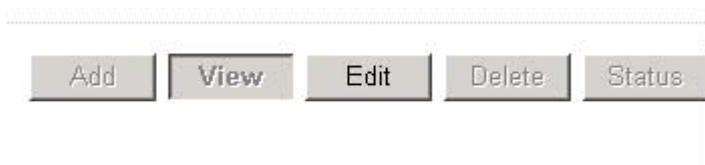
To return to the previous page, press the 'Drill Up' button



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



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

The screenshot shows a web application interface. On the left, there is a grey panel containing a hierarchical filter menu. This menu is circled in red. The main content area displays a table titled "Source - TDUSchool10". The table has columns for LA, Estab, Source Level, and Software Code. Below this, there is a table with columns for Data Item and Value, listing various source details. At the top right, there are buttons for "All Errors" and "All Notes".

LA	Estab	Source Level	Software Code
SWF LA 1	4009	School	SWF Converter

Data Item	Value
SOURCE	
Source Level	School
LA	SWF LA 1
Estab	4009
Software Code	SWF Converter
Release	1
Xversion	
Serial No	1
DateTime	2015-03-26 13:20:20

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.

School Workforce Annual Collection

Source: School Workforce Annual Collection - TDUSchool10

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)	Errors	Queries	OK	Return Level Notes
	0	2	0	

Data Item	Value	Errors	Queries	OK	History
HEADER INFORMATION					
Collection	School Workforce Census	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-11-05	0	0	0	
View Source Details					
					View All

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

Source - TDUSchool10

LA	Estab	Source Level	Software Code	Rule Errors
SWF LA 1	4009	School	SWF Converter	0

Data Item	Value	Errors	Queries	OK	History
SOURCE					
Source Level	School	0	0	0	
LA	SWF LA 1	0	0	0	
Estab	4009	0	0	0	
Software Code	SWF Converter	0	0	0	
Release	1	0	0	0	
Xversion		0	0	0	
Serial No	1	0	0	0	
DateTime	2015-03-26 13:20:20	0	0	0	
View CBDS Levels					
					View All
View School Workforce Modules					
					View All
View School Workforce Members					
					View All
View School Details					
					View All
View LA Details					
					View All

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

School Workforce Member - TDUSchool10

Filter By: Teacher Number, Family Name, Gender, Date of Birth, QT Status

Teacher Number	Family Name	Gender	Date of Birth	QT Status	Rule Errors
999999	SURNAME_1.NAME_1	Not Known	2000-10-01	True	2
999998	SURNAME_2.NAME_2	Not Known	2000-10-01	True	2
999997	SURNAME_3.NAME_3	Not Known	2000-10-01	True	3

Data Item	Value	Errors	Queries	OK	History
WORKFORCE MEMBER					
Staff Details					
Teacher Number	999999	0	0	0	
Family Name	SURNAME_1	0	0	0	
Given Name					
NAME_1					
View Given Name(s)					
					View All
Former Family Name(s)					
FORMER_1					
View Former Family Name(S)					
					View All
NI Number	X0399999C	0	0	0	
Gender	Not Known	0	0	0	
Date of Birth	2000-10-01	1	1	0	
Ethnic Code	WGR - White - British	0	0	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 All
View Absence Details					
					View All
View Curriculum Details					
					View All
View Qualification Details					
					View All

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.

Teacher Number	Surname	Given Name	Gender	Date of Birth	QT Status	QT Status	Rule Errors
999999	SURNAME_1 NAME_1		Not Known	2000-10-01	True		2
999998	SURNAME_2 NAME_2		Not Known	2000-10-02	True		2
999997	SURNAME_3 NAME_3		Not Known	2000-10-03	True		3

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

WORKFORCE MEMBER

Staff Details

Teacher Number	999999	Errors	0	Queries	0	OK	0
Family Name	SURNAME_1	Errors	0	Queries	0	OK	0

Given Name

NAME_1		Errors	0	Queries	0	OK	0
MIDNAME_1		Errors	0	Queries	0	OK	0

Former Family Name

FORMER_1

View Former Family Name(S)

NI Number	X0999999C	Errors	0	Queries	0	OK	0
Gender	Not Known	Errors	0	Queries	0	OK	0
Date of Birth	2000-10-01	Errors	1	Queries	1	OK	0
Ethnic Code	WBR - White - British	Errors	0	Queries	0	OK	0
Disability	no	Errors	0	Queries	0	OK	0
QT Status	True	Errors	0	Queries	1	OK	0
HLTA Status	True	Errors	1	Queries	0	OK	0
QTS Route	Mutual Recognition from NI, Scotland or the EEA	Errors	0	Queries	0	OK	0

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

The screenshot shows the 'School Workforce Member - TDUSchool10' interface. The 'Filter' section at the top includes fields for Teacher Number, Family Name, Gender, Date of Birth, and QT Status. The 'Record List' section below shows a table with columns: Teacher Number, Name, Gender, Date of Birth, QT Status, and Rule Errors. The 'Name' column is highlighted with a red circle. The table contains three records:

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
999999	SURNAME_1.NAME_1	Not Known	2000-10-01	True	2
999998	SURNAME_2.NAME_2	Not Known	2000-10-02	True	2
999997	SURNAME_3.NAME_3	Not Known	2000-10-03	True	3

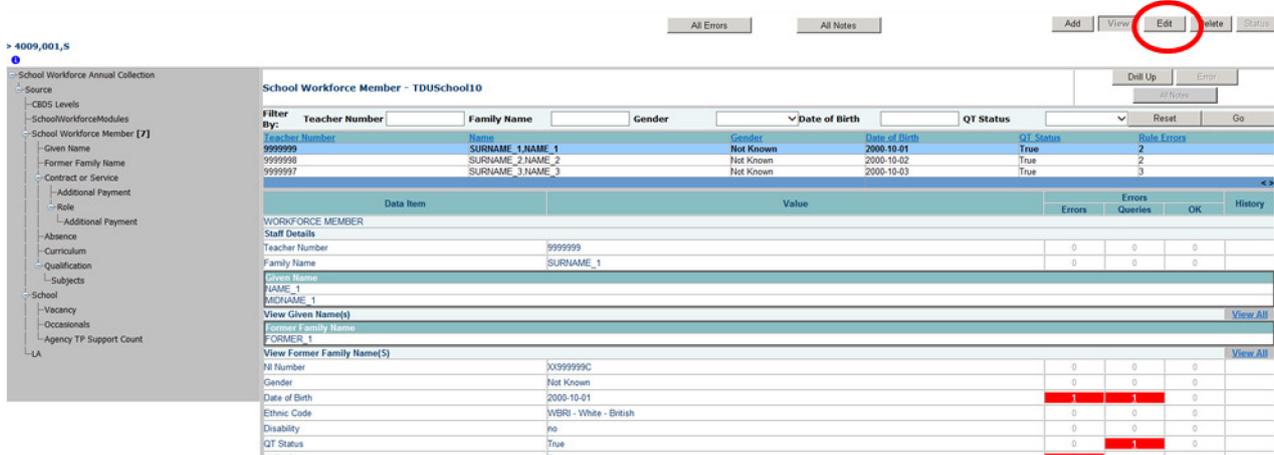
Below the record list is a 'Data Item' table with columns: Data Item, Value, Errors, Errors Queries, OK, and History. The 'Data Item' table contains details for the selected record (Teacher Number: 999999, Family Name: SURNAME_1).

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.

The screenshot shows the same 'School Workforce Member - TDUSchool10' interface. The 'Filter' section at the top includes fields for Teacher Number, Family Name, Gender, Date of Birth, and QT Status. The 'Family Name' field is highlighted with a red circle. The 'Record List' section below shows the same table as in the previous screenshot, but the 'Name' column is not highlighted. The 'Data Item' table below also shows details for the selected record (Teacher Number: 999999, Family Name: SURNAME_1).

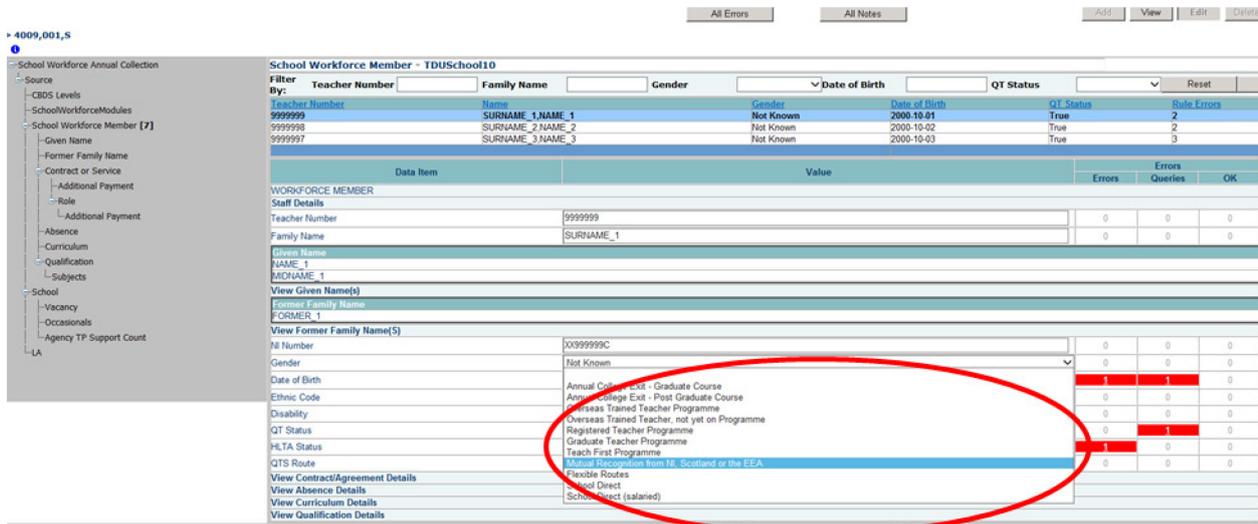
Editing within the Data Return

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

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



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

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 :

Errors : Queries : OK Errors :

The breakdown of errors for a school return is shown in the Return Status section of the school's main screen

Return Level Errors

Return level errors relate to a validation rule that applies to the return as a whole rather than an individual data item within the return, e.g. 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

All Errors All Notes Add View Edit Delete Status

School Workforce Annual Collection - TDUSchool10		Errors	Queries	OK	Return Level Notes
RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)		0	2	0	
Data Item	Value	Errors	Queries	OK	History
HEADER INFORMATION					
Collection	School Workforce Census	0	0	0	
Year	2015	0	0	0	
Reference Date	2015-11-05	0	0	0	
View Source Details					View All

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. E.g. 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 - TDUSchool10

Filter By: Teacher Number, Family Name, Gender, Date of Birth, QT Status

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
9999999	SURNAME_1_NAME_1	Not Known	2000-10-01	True	2
9999998	SURNAME_2_NAME_2	Not Known	2000-10-02	True	2
9999997	SURNAME_3_NAME_3	Not Known	2000-10-03	True	3

Data Item	Value	Errors	Queries	OK	History
WORKFORCE MEMBER					
Staff Details					
Teacher Number	9999999	0	0	0	
Family Name	SURNAME_1	0	0	0	
Given Name					
View Given Name(s) View All					
Former Family Name					
FORMER_1					
View Former Family Name(s) View All					
NI Number	XX999999C	0	0	0	
Gender	Not Known	0	0	0	
Date of Birth	2000-10-01	1	1	0	
Ethnic Code	WBRI - White - British	0	0	0	
Disability	no	0	0	0	
QT Status	True	0	1	0	
HLTA Status	True	1	0	0	
QTS Route	Annual College Exit - Graduate Course	0	0	0	
View Contract/Agreement Details					
View Absence Details					
View Curriculum Details					
View Qualification Details					

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

10/2000

All Errors All Notes Add View Edit Delete Status

Absence - TDUSchool10

Name	NI Number	First Day	Last Day	Absence Category	Rule Errors
SURNAME_1_NAME_1	XX999999C	2015-01-12	2015-01-10	Sickness	2

Data Item	Value	Errors	Queries	OK	History
ABSENCE					
First Day	2015-01-12	1	0	0	
Last Day	2015-01-10	2	0	0	
Working Days Lost		0	0	0	
Absence Category	Sickness	1	0	0	

An error report will be displayed

TDUSchool10 Error report on 25/08/2015 at 09:15

Priority	Data Field	LastDayOfAbsence	Errors	Count
4940	Rule No.	Last Day of absence cannot be before First Day of absence	Details	2
4990	Rule No.	Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero.	Details	1
Page 1 of 1				
Priority Queries Count 0				
Rule No. Error Message Notes				
Page 1 of 1				
Priority OK Count 0				
Rule No. Error Message Priority Notes				
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.

TDUSchool10 Error report on 25/08/2015 at 09:15

Rule No.	Error Message	Priority	Count
4940	Last Day of absence cannot be before First Day of absence	Errors	2
4990	Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero.	Errors	1

Page 1 of 1

Rule No.	Error Message	Priority	Count
Queries			
Count 0			

Page 1 of 1

Rule No.	Error Message	Priority	Count
OK			
Count 0			

Page 1 of 1

The information will be displayed as hyperlinks on the right

TDUSchool10 Error report on 25/08/2015 at 09:27

Rule No.	Error Message	Priority	Count	Field	Value
4940	Last Day of absence cannot be before First Day of absence	Errors	2	Last Day	Jun 12 2015 12:00AM
4990	Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero.	Errors	1	Last Day	Jun 10 2015 12:00AM

Page 1 of 1

Rule No.	Error Message	Priority	Count
Queries			
Count 0			

Page 1 of 1

Rule No.	Error Message	Priority	Count
OK			
Count 0			

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

School Workforce Annual Collection - TDUSchool10

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)

Data Item	Value	Errors	Queries	OK	Return Level Notes
Collection	School Workforce Census	0	2	0	
Year	2015	0	0	0	
Reference Date	2015-11-05	0	0	0	

View Source Details

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

TDUSchool10						Error report on 25/08/2015 at 09:39		Count 10		Return Details	
Code No	Return Level	Error Message	Priority	OK'd	Flags	Field	Value				
4235Q		Person is not expected to have QT status and be under 21 years of age on ReferenceDate05/11/2015	Queries			PersonBirthDate	<u>Oct 1 2009 12:00AM</u>				
4245		Person cannot be shown as having H.T.A status and be under 18 on ReferenceDate05/11/2015	Errors			QTStatus	<u>1</u>				
4160Q		Member of workforce with missing NI Number	Queries								
6540Q	Y	At least one staff record in this school's return should show a role of Head Teacher or Executive Head Teacher	Queries								
4235Q		Person is not expected to have QT status and be under 21 years of age on ReferenceDate05/11/2015	Queries								
4245		Person cannot be shown as having H.T.A status and be under 18 on ReferenceDate05/11/2015	Errors								
4235Q		Person is not expected to have QT status and be under 21 years of age on ReferenceDate05/11/2015	Queries								
4245		Person cannot be shown as having H.T.A status and be under 18 on ReferenceDate05/11/2015	Errors								
4940		Last Day of absence cannot be before First Day of absence	Errors								
4990		Where Last Day of a sickness absence is provided then the number of Working Days Lost must be greater than zero	Errors								

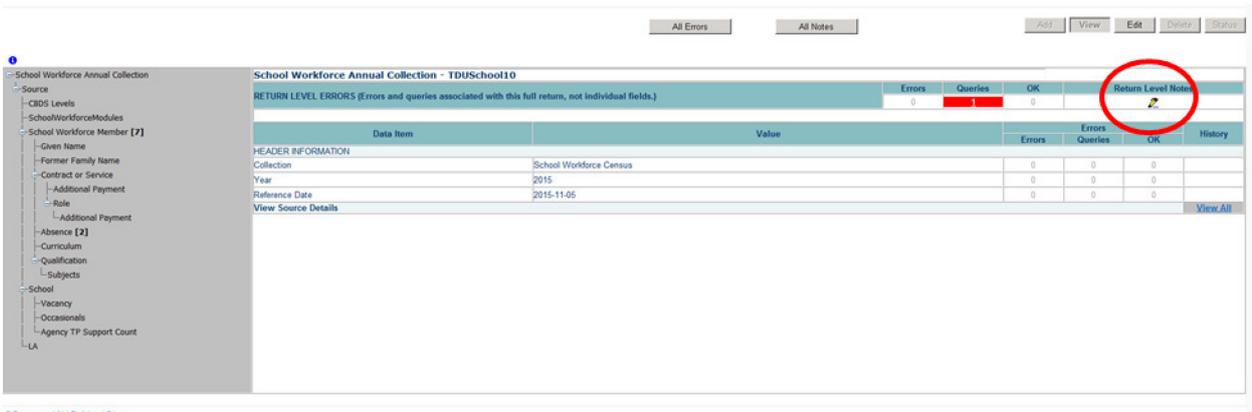
Page 1 of 1

Return Level notes

If a notepad entry is not returned the local authority 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.

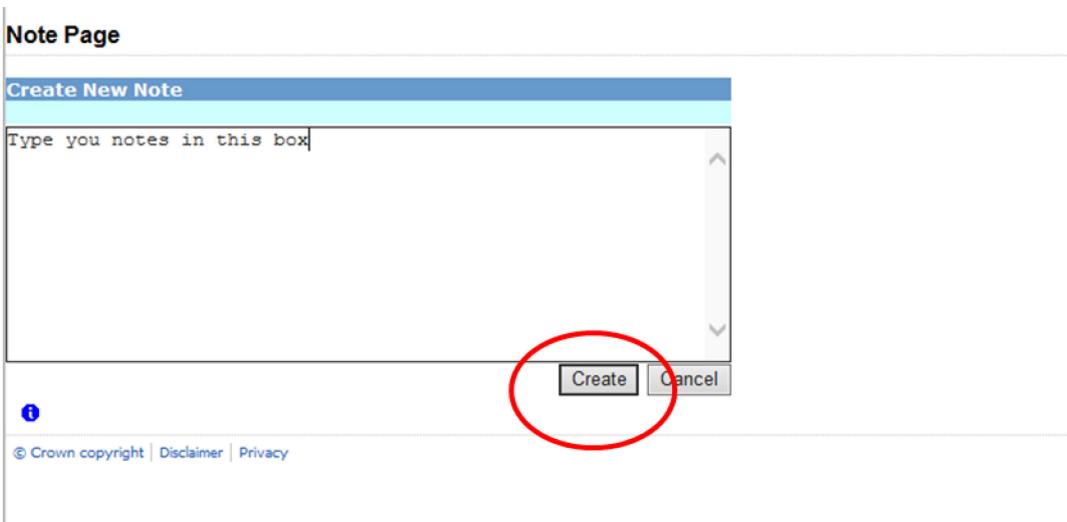
To add a return level note double click on the pen icon in the return level notes section.



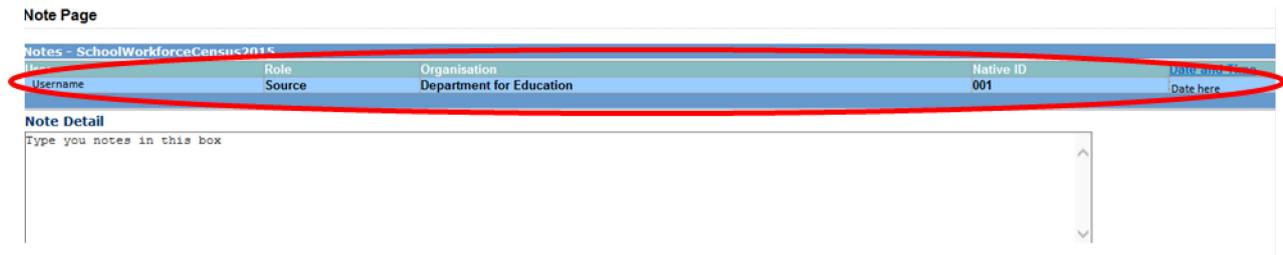
Click add new note and type your note and the error number in the box provided– Do this for all queries/errors you need to provide extra information for



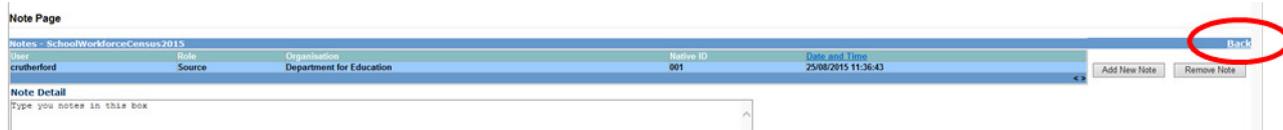
Click create.



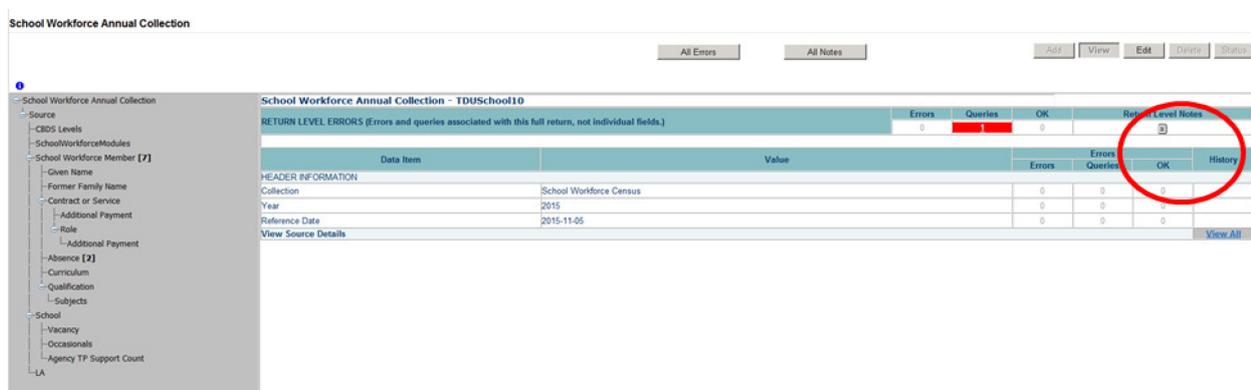
The note will be saved and a record row will be created showing who created the note and when.



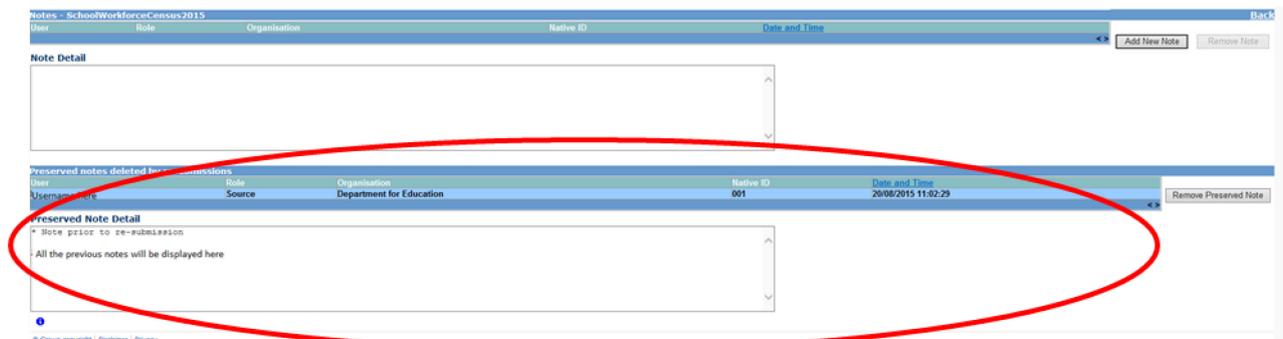
Return to the previous screen by clicking on 'back'.



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.



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 local authority 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 local authority can approve and the Department can 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'.

The screenshot shows the 'MY DATA RETURN' interface. At the top, it displays 'The status of your data return : Loaded_and_Validated' and 'Errors : 3'. Below this, there are several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...' (circled in red), 'Export to file...', 'Launch Reports...', and 'Delete Return...'. To the right of these buttons, there are instructions for each. Below the buttons, there are three sections: 'Data Return Submission' with a 'Date Submitted' field, 'Data Return Approval' with a 'Date Approved' field, and 'Data Return Authorisation' with a 'Date Authorised' field. At the bottom, there is a 'I need some help' section with a link to the help desk.

You will be asked to confirm this function,

The dialog box has a title bar 'Submit Return Confirmation'. The main text asks 'Are you sure you wish to submit this Data Return?'. At the bottom, there are two buttons: 'Yes' and 'No', both with right-pointing arrows.

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.

MY DATA RETURN

The status of your data return: Submitted

Errors : 13 Queries : 6 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
Delete Return...	Press this button to Delete your data return

What is happening to My Data Return?

Data Return Submission Date Submitted: 10/09/2015	Data Return Approval Date Approved: _____	Data Return Authorisation Date Authorised: _____
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I need some help

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

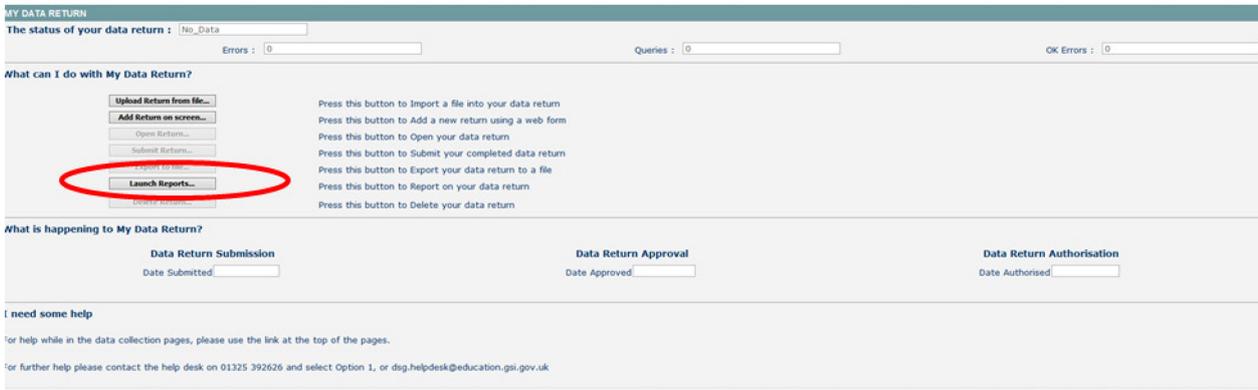
For further help please contact the help desk on 01325 392626 and select Option 1, or dsg.helpdesk@education.gsi.gov.uk

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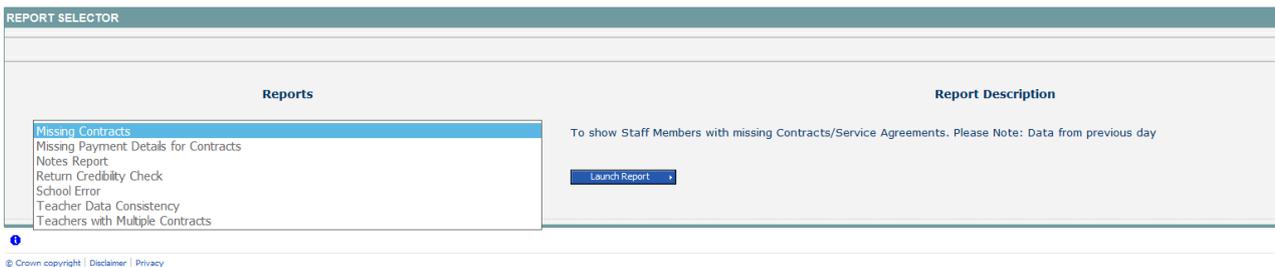
The local authority will then approve and the Department will analyse the data and authorise the return. Once these have been completed the subsequent dates will appear.

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.

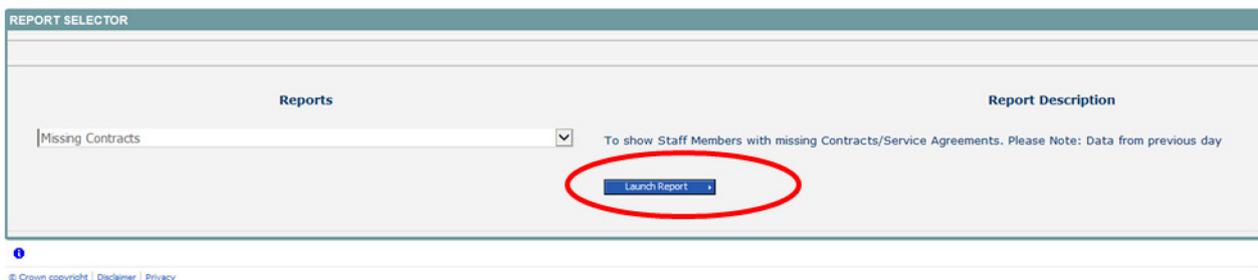


A drop down menu will be displayed and a report can be selected from that drop down list. The following reports are available to schools.



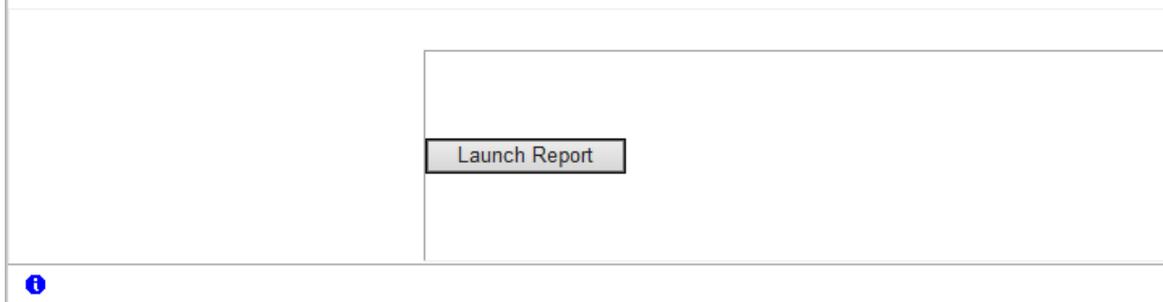
Exporting reports

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.



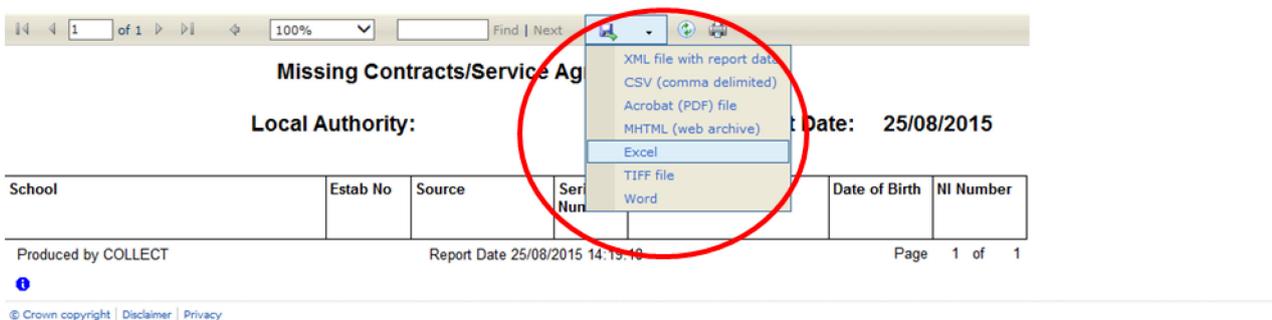
From here, you will need to then select Launch reports again

Report Parameter Selection



You can export the data in various formats.

Missing Contracts Report



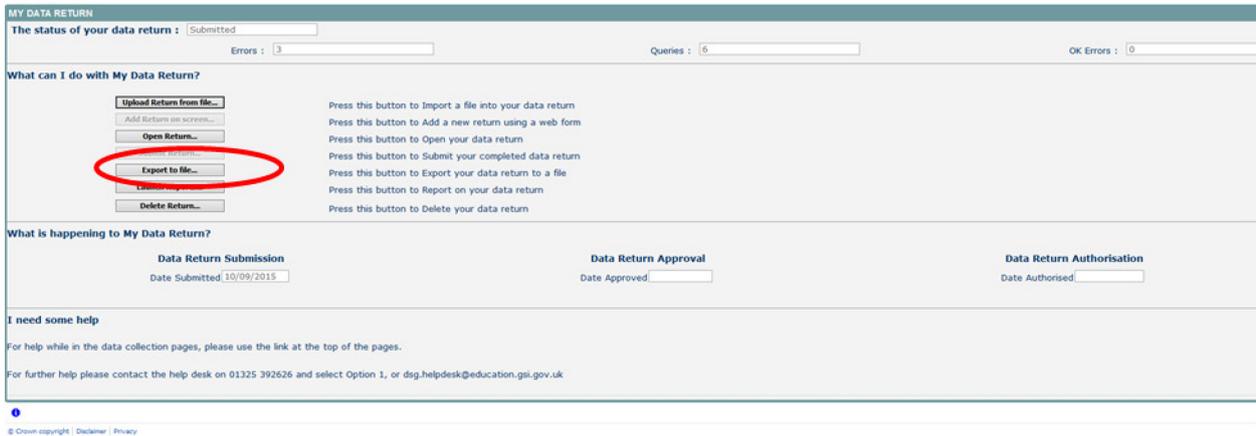
The reports are run against a copy of the data as at close of play the previous day. If any data has been edited, deleted, inserted or reloaded since the data was copied, the report will not match the live data.

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.

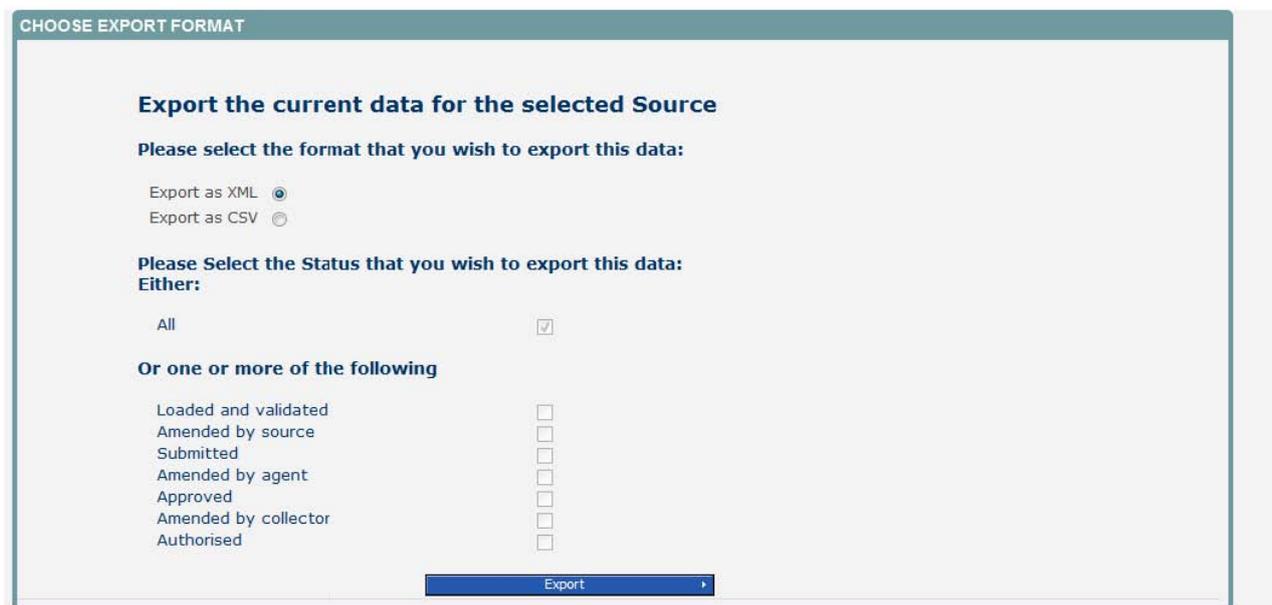
Exporting a data return

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.



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





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.

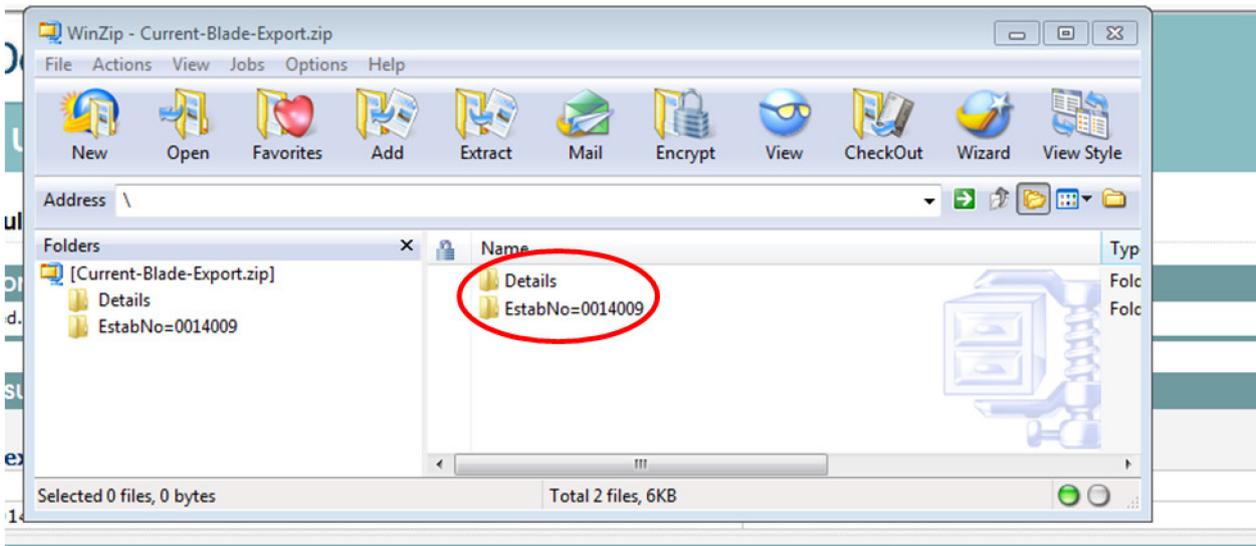
Alternatively you could try changing you security settings by

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)

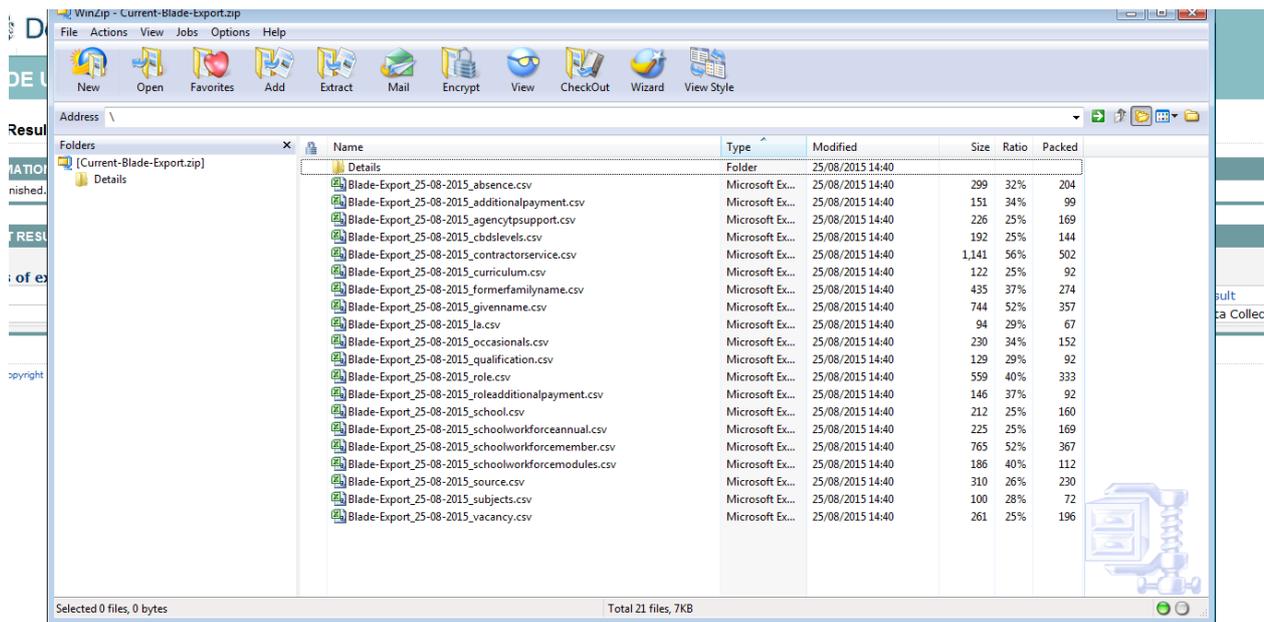
Then try producing the export again and this time the Open/Save/Cancel dialogue box should appear

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

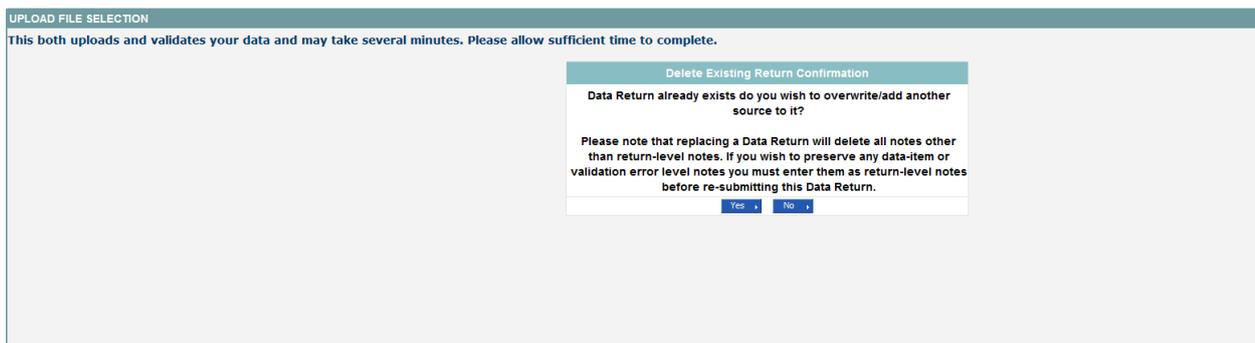


Exports can also be provided in CSV format. Select 'Export as CSV' and when the **Save** and **Open** options appear click on the **Open** button



Useful hints

1. **VERY IMPORTANT - Re-submissions** – if a data return for a local authority 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). This overwrite will include any notes that have **not** been entered in the **return level notes**. If you try to upload a file that is already in the system then you will be given the following message



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 re-submission. 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.

2. 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.
3. 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 local authorities 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 local authority 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 [service request](#) 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 [service request](#) to the SA service desk.



Department
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