# School admission appeals data collection (APAD) 2016

## COLLECT user guide

**December 2015**

# Contents

# COLLECT and Secure Access

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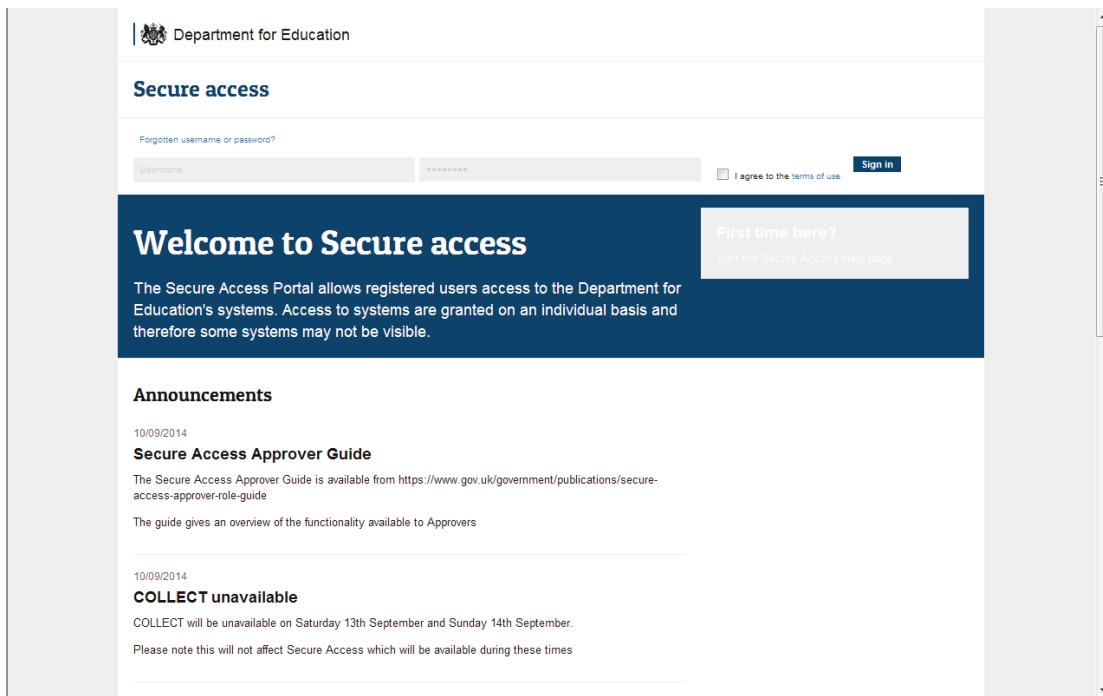


Please note some screen shots may refer to 2014 however the process is the same for all 2016 collections.

If you are a new user and require access to COLLECT, you will need to contact the approver within your local authority.

Full Secure Access information is published on the Secure Access website. Once successfully registered, open the 'Your applications' tab to access COLLECT, as below.
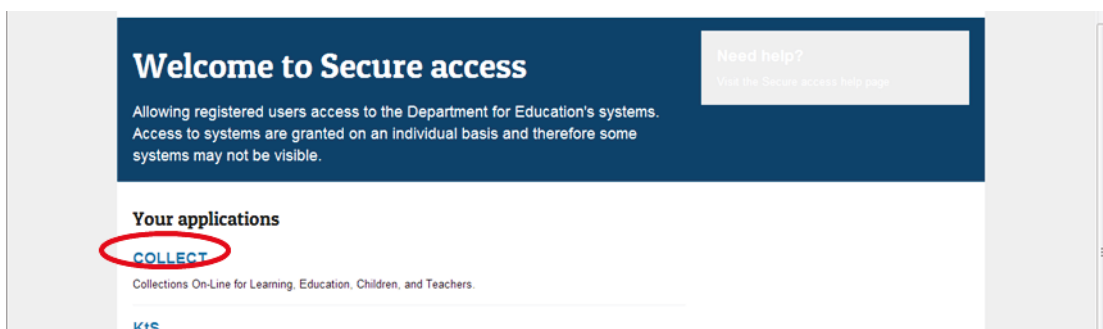


Once successfully registered, open the 'Your applications' tab to access COLLECT, as above.

Click on 'continue', as above.

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.

# Local authority ('Source' page) screen

The next screen ('Source' page) provides a summary of the latest position with respect to the data collection.



The different status of data is as follows:

No data – the return has not been added to the system.

Loaded and validated – a data return has been added and validated but not yet submitted.

Submitted – the return has been submitted by the local authority.

Amended by source - the return has been amended by the local authority (source).

Authorised – the return has been checked and authorised by the collector (DfE).

Status is followed by a series of buttons as listed below:

Upload return form – this function will not be available for the collection as the user can only add data on screen.

Add return on screen – allows the source to type the return on screen – must be used for this return.

Open return – this option is unavailable until data has been entered and is used to access the data for editing or viewing.

Submit return – this option is unavailable until the data has been entered and is used to submit the data to the DfE – this should only be done when the data is complete and clean. Control then passes to the DfE.

Export to file – this is unavailable until the data has been entered and is used to export the data either as a single XML file or a CSV file.

Launch reports – there are no reports available for this data collection.

Delete return – this option is only available when data has been entered and is used to delete the local authority data from the system.

# Adding a return

To add a return, the user must click the 'Add Return on screen' button.



The next screen to appear is the return form, as shown.

First click on 'save'.



On clicking on 'Save' your local authority number and name will be automatically pre-populated.

# Navigating through the screens

The first screen of the return is your return details.



The next screen to appear allows the local authority user to input their data.



To enter data the user must first click on 'Edit'.

APAD

| All Errors | All Notes | | Add | View | Edit | Delete | Status |

# Editing a return

Clicking on the 'Edit' button opens the value boxes, allowing the user to add and amend their data next to each question.



Clicking on 'View' will close the value boxes and save any data that has been added or amended.

# Viewing errors and queries screen

A user can view an error by clicking on the 'All Errors' button on the first page of the return.
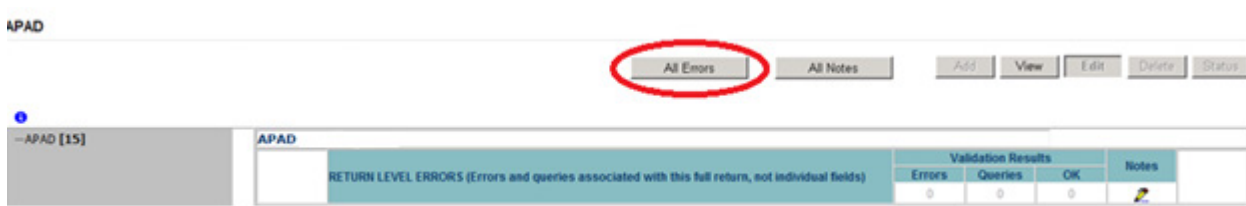


A user can also access the error report by clicking in the error field next to each data value.
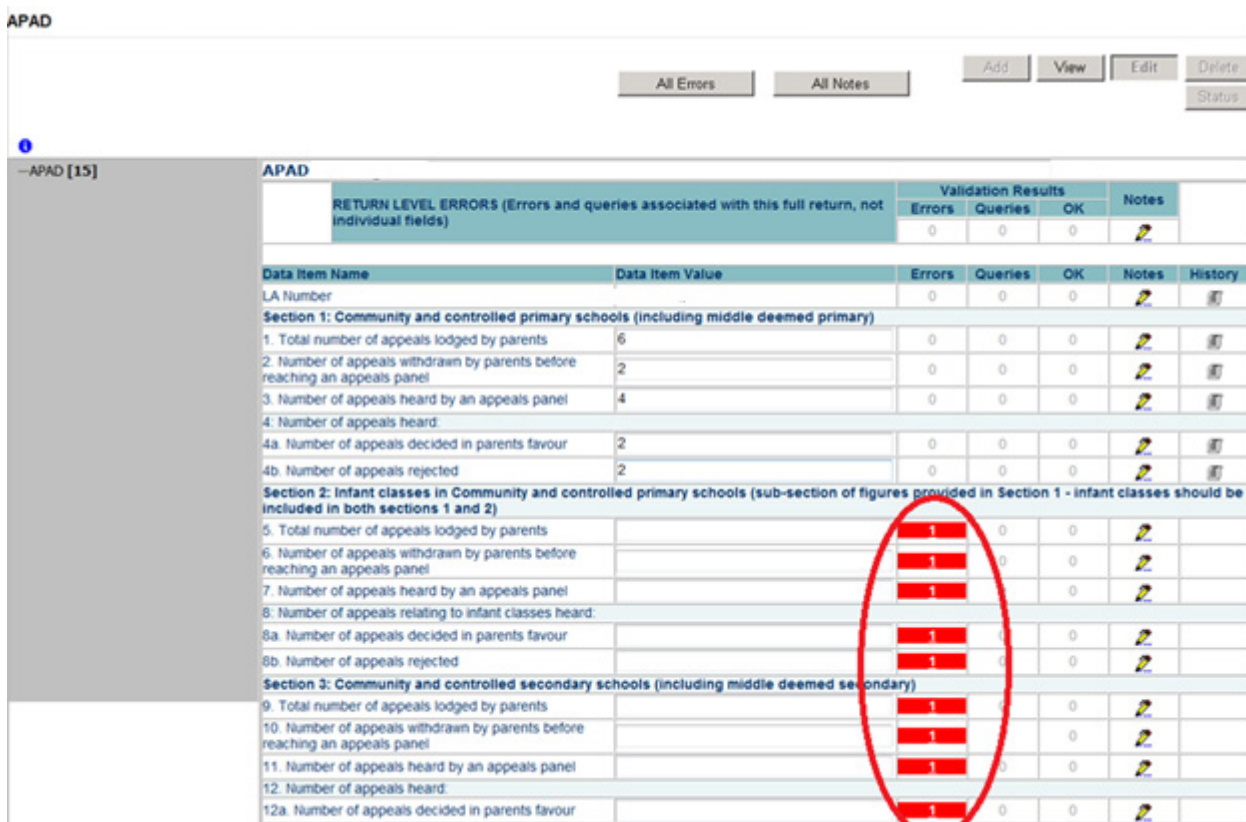
Once a user has clicked on either 'All Errors' or the data field error, they will be taken to the blade error report page.



Once the user has clicked the 'Details' button they will see the details appear on the right hand side of the screen, as shown below.



The user can then navigate to an error by clicking the 'Value' of an error on the right hand side of the screen (which is 'null' in this case).

Once the user has clicked this 'Value', they will be taken to the section where that error is occurring. They can then make the required amendment.

# Adding return level notes

To add a note relating to an outstanding query, please click on the pencil icon located next to the local authority number section.



You will then be presented with the note page screen below



The user will need to click on 'Add New Note' to enable them to type in the note detail box.
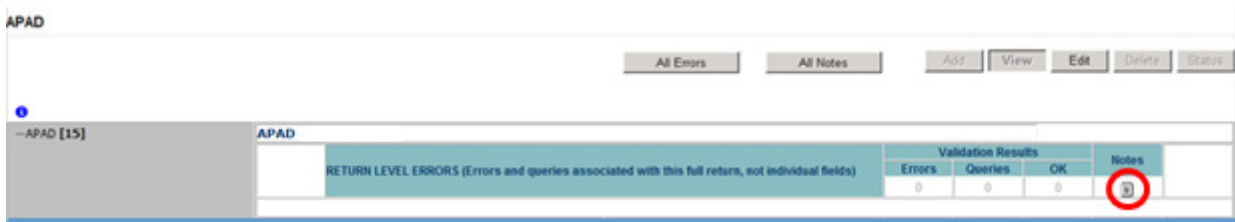
Once a note has been added, click on 'Create'. This will then save the note against the return. The pencil icon will then change to a notepad icon, which indicates a note has been added.



Please note all errors must be resolved. Return level notes added against outstanding queries will be reviewed by the department on submission of the return by the local authority.

# Submitting a return

'Clean data submit' in COLLECT.

You won't be able to submit your return in COLLECT if it contains validation errors. These must be corrected before the 'submit' button becomes available (COLLECT will alert you to any fields where errors have been identified). This new function is called 'clean data submit'. You will still be able to submit your data where queries are present, although these must be accompanied by an explanatory note.

Once the local authority user is happy for their return to be submitted for departmental access the procedure is very straightforward. First return to the 'Source Page' by clicking on 'Back to my COLLECT page' located at the top of the form.
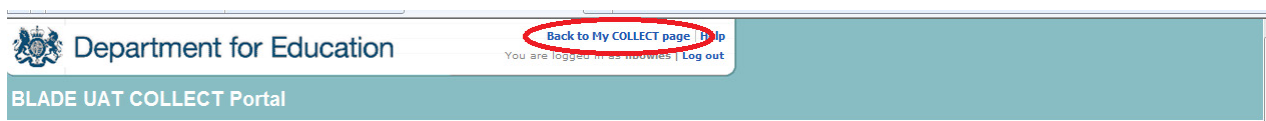


Then select 'Submit Return'.
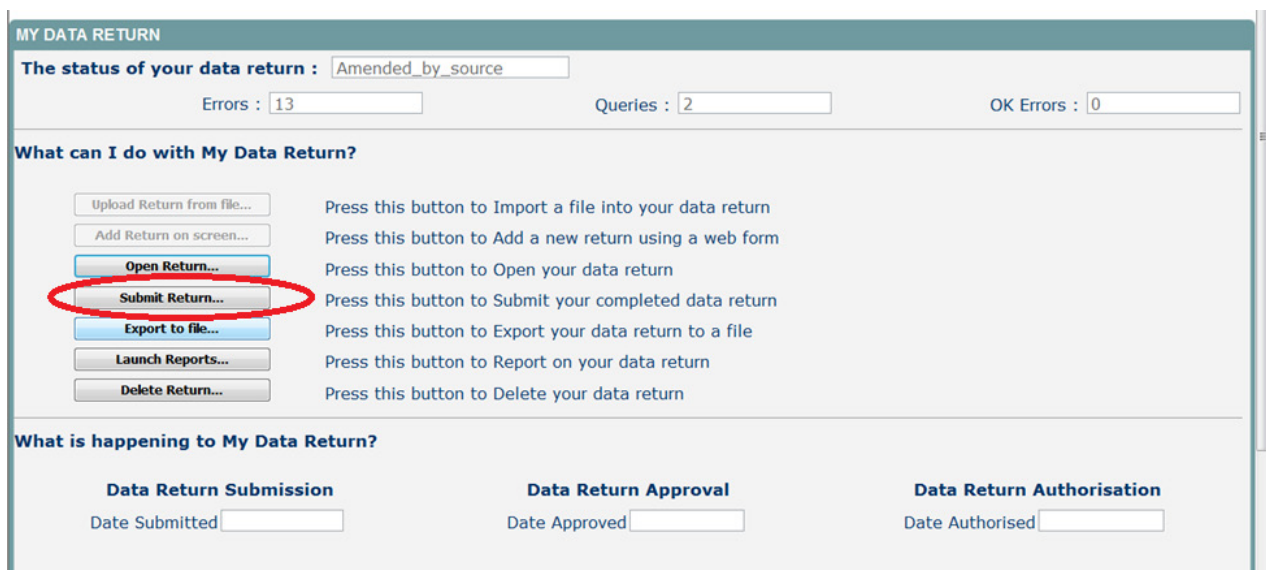
# Deleting a return

If a local authority user wants to delete a full return, they can do so by clicking 'Delete Return'.

**MY DATA RETURN**

The status of your data return : Amended_by_source

Errors : 13     Queries : 2     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** | **Data Return Approval** | **Data Return Authorisation** |
| Date Submitted | Date Approved | Date Authorised |

The status of the data return will revert back to 'No Data' and the local authority user will need to click on 'Add return on screen' to re-enter their data.

# Export a return

COLLECT provides options to export data in CSV or XML format. Exporting data can be performed by clicking on the 'Export to file' button.
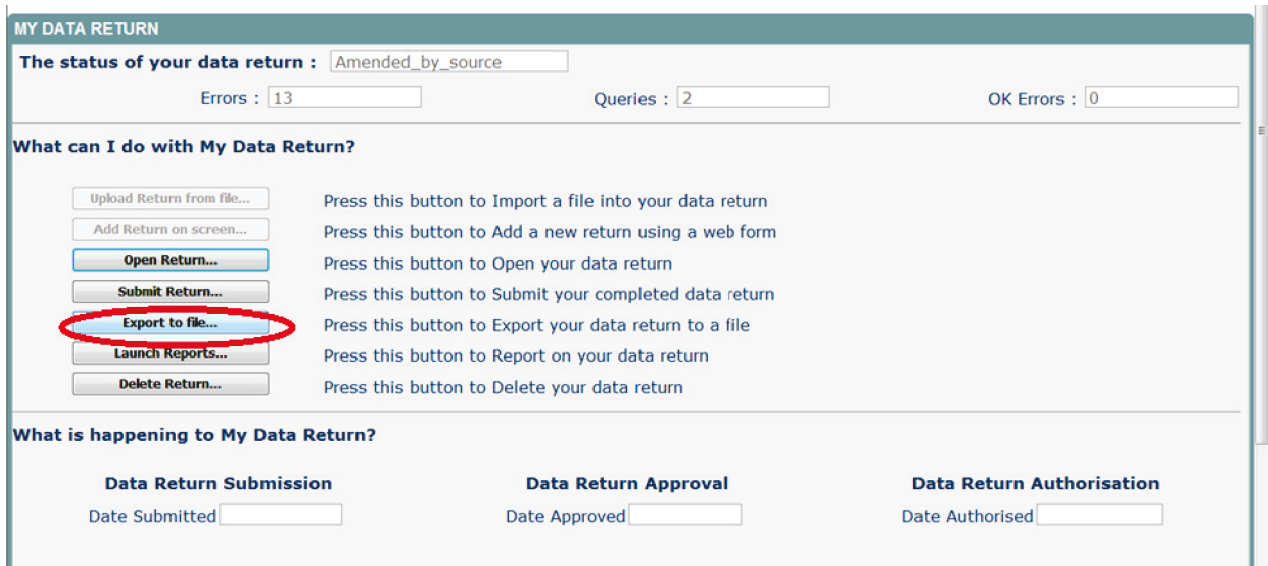


Once the user has clicked 'Export to File' button, they will be taken to the export report format.
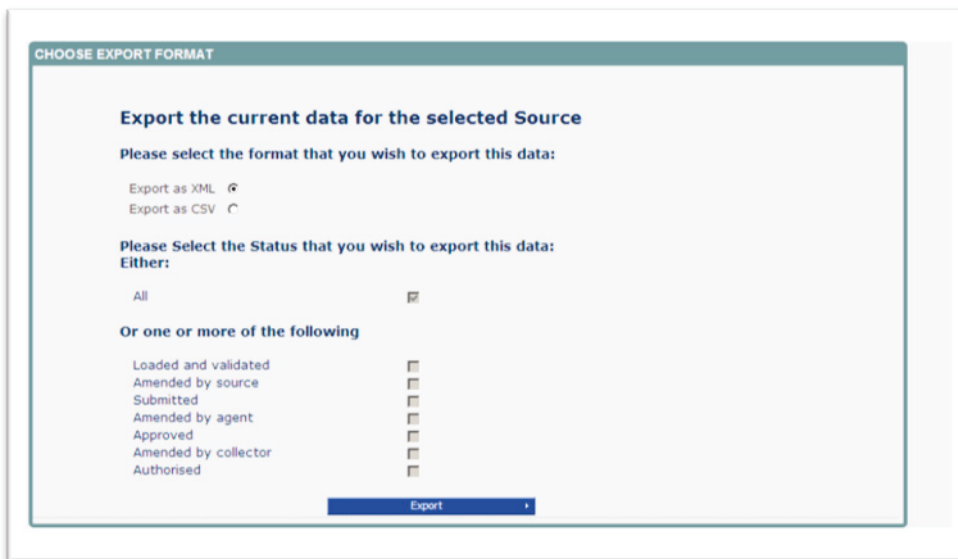


Select the format of exported data that you require and when prompted you can either save the file to a specific location, or can open the file for viewing.

# Screen functionality

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



Don't use the browser buttons. When in the data collection, unpredictable behaviour may be experienced if you use the back and forward buttons on your web browser's toolbar.

# Navigation through a return

To navigate through the system, links are provided on all pages either as 'Back' or 'Drill Up' options. Please use these links to navigate between screens when using the system.

| Control | Usually located | Action |
|---|---|---|
| Back to MyCOLLECT page | All screens within a return except the main page which shows 'Back to Home page' | Returns you to the main page for your user role ('Agent', 'Source', etc) |
| Drill Up | Any data screen within a return apart from the header screen | Returns you to the previous data screen |
| Return | Report screens, eg 'History' and 'errors' | Returns you to the previous screen |
| Back | Notes screens | Returns you to the previous screen |
| View All | Data entry screens that have additional linked data, eg assessments | Takes you to the sub module level details |

# Mode buttons

Those buttons determine which operation mode the data form on screen 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.

# COLLECT issues and data collection enquiries

If you are experiencing problems with COLLECT or have a data collection query, please submit a data collection service request form to the Data Collections Helpdesk.

# Secure Access issues

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 Secure Access  service desk.

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