



Department
for Education

School census 2015 to 2016

COLLECT guide for local authorities

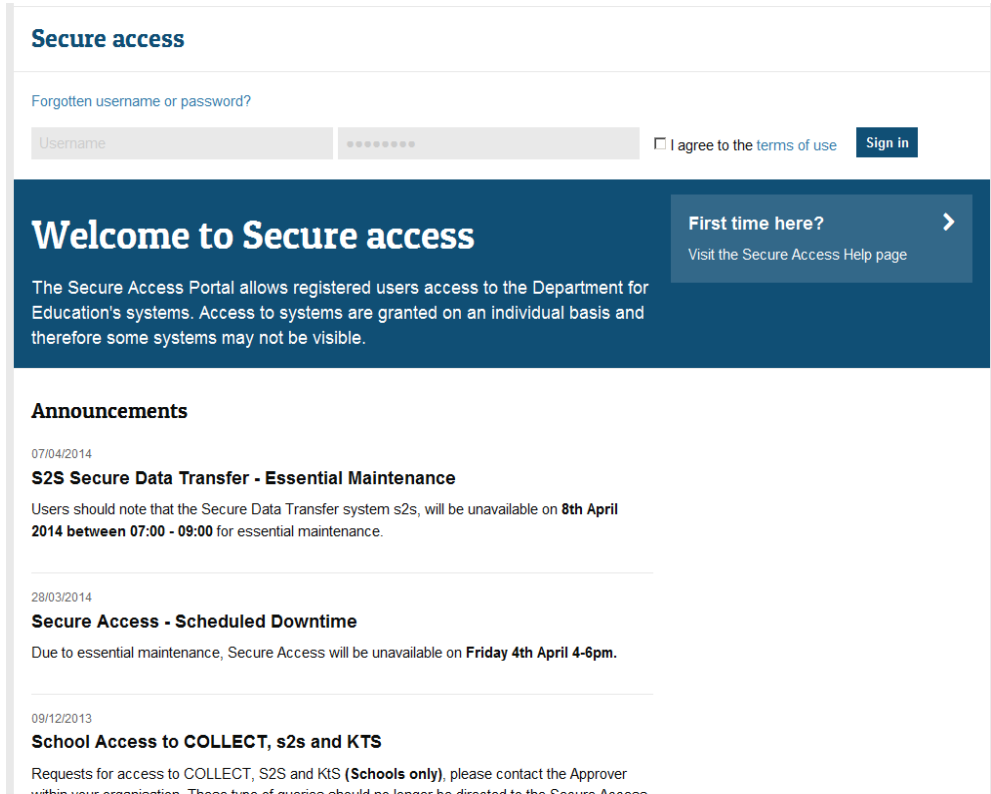
May 2016

Contents

COLLECT and secure access	3
Agent page	5
Filter by	5
Performance summary	6
Sources	6
Agent functions	7
Loading a return for a single school	8
Uploading multiple files	10
Viewing the return details	11
Editing data within the return	12
Errors	13
Total return errors	13
Return level errors	13
To view all errors and queries on the return	13
Correcting errors	14
Providing clarification/ supplementary information	15
Approving the return	17
Queues	19
Reports	22
Exporting a return	24
Export selected	24
Export multiple	24
Export all	24
Academy export	24
Selecting format	25
Screen functionality	27
Screen navigation	27
Navigation controls	27
Mode buttons	28
Help	29

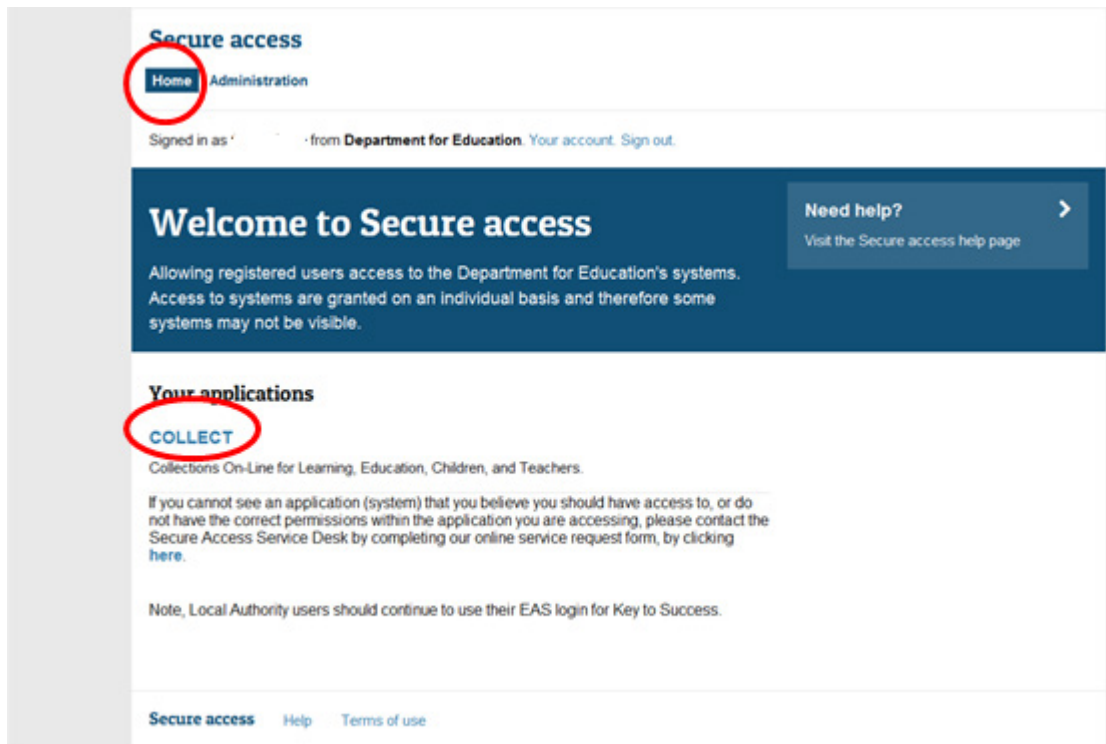
COLLECT and secure access

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



Full secure access guides are published on the [Secure Access Website](#).

Once successfully registered, click on to 'home' and then click on 'COLLECT' to enter COLLECT as below:



Then click on to 'continue' to enter COLLECT as below:

Department for Education You are logged in as [username] Log out

COLLECT Portal

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.

PROCEED INTO COLLECT
Continue...
Code of Conduct
Show Code of Conduct Text...

Select the collection by clicking on the collection name to highlight it (if there is only one it will be automatically highlighted) and then click on the 'select data collection' button to open it.

BLADE UAT COLLECT Portal

Home Page

MY DATA COLLECTIONS

Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2016_Summer	Agent	Department for Education	Testing	19/05/2016 00:00:00	34
SchoolCensus 2016_Summer	Collector	Department for Education	Testing	19/05/2016 00:00:00	34
SchoolCensus 2016_Summer	Administrator	Department for Education	Testing/Live	19/05/2016 00:00:00	34
SchoolCensus 2016_Spring	Agent	Department for Education	Open	21/01/2016 00:00:00	-85
SchoolCensus 2016_Spring	Collector	Department for Education	Open	21/01/2016 00:00:00	-85
SchoolCensus 2015_Summer	Collector	Department for Education	Open	21/05/2015 00:00:00	-330
SchoolCensus 2015_Summer	Agent	Department for Education	Open	21/05/2015 00:00:00	-330
SchoolCensus 2015_Spring	Agent	Department for Education	Open	15/01/2015 00:00:00	-456
SchoolCensus 2015_Spring	Collector	Department for Education	Open	15/01/2015 00:00:00	-456
SchoolCensus 2015_Spring	Source	DfE Secondary Academy	Open	15/01/2015 00:00:00	-456

Page 1 of 3

Select Data Collection

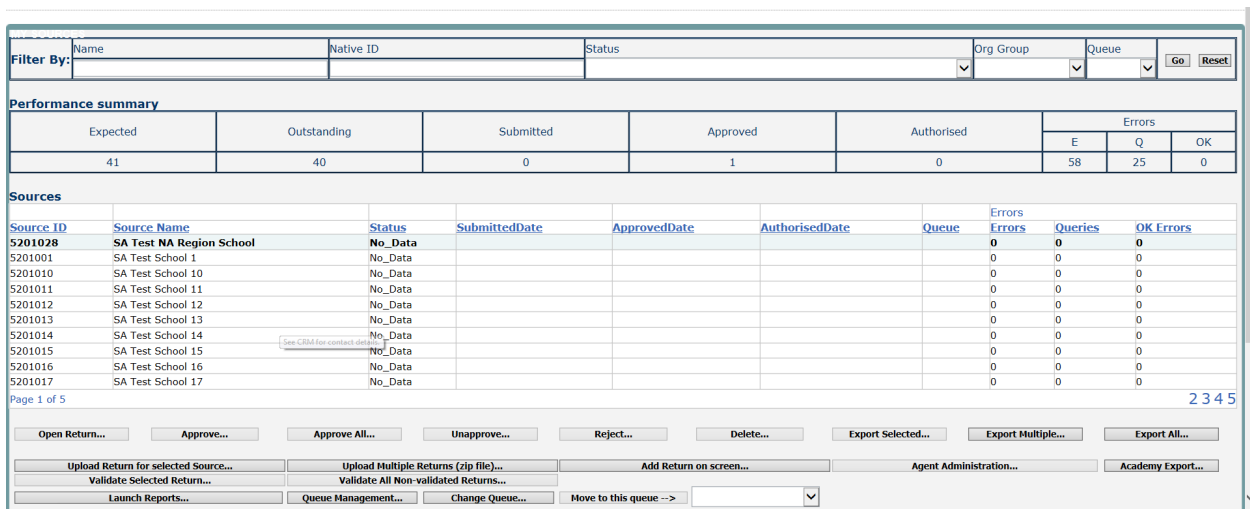
News

Welcome to COLLECT (Collections On-Line for Learning, Education, Children, and Teachers).
COLLECT is the DfE Centralised Data Collection and Management System for Education.
If you have any problems logging into COLLECT please contact the Helpdesk on 01325-392626 or e-mail: DSG.Helpdesk@education.gsi.gov.uk

Scheduled Downtime
Please note: Due to planned maintenance COLLECT will be unavailable from 6pm Friday 18th September. It will be available by Monday 21st September.

Agent page

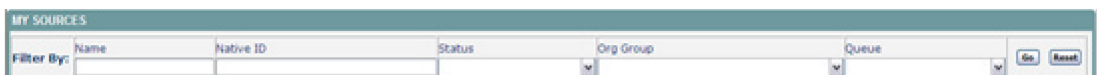
The agent (local authority) main screen will now be displayed listing all the schools for your local authority.



The agent screen comprises four main sections:

1. Filter by
2. Performance summary
3. Sources
4. Agent functions

Filter by



This section allows you to limit the number of schools displayed in the source section of the screen. It can be used to display a single school or a group of schools that have the same characteristics.

For example; by entering an establishment number in the 'native id' and selecting the 'go' button then only the school with that establishment number will appear on the screen. This saves the user having to go through numerous screens to get to the particular school return they want to work on

The user can only change the sort order by clicking on one of the headers with a blue text. For example; by clicking on the 'source name' header all the schools in the local authority return will be sorted in ascending school name order, click again and they will be sorted in descending school name order.

Performance summary

Performance summary							
Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
2533	2530	3	0	0	75	51	0

This area of the screen shows a breakdown of the status of the returns for the authority's schools that are part of the collection.

It shows

5. The total number of schools that a return is expected from;
6. The total number of schools who have yet to submit their return;
7. The total number of schools who have submitted their return;
8. The total number of school returns approved by the local authority;
- 8.1. The total number of school returns authorised by the department for education;
9. The total number of errors across all returns, sorted by error severity.

This section is refreshed any time a change is made to the underlying data e.g. when the status of a school return has changed from 'submitted' to 'approved', the approved total will be incremented by 1, while the submitted total will decrease by 1.

Sources

Performance summary									
Expected	Outstanding	Submitted	Approved	Authorised	Errors				
					E	Q	OK		
41	40	0	1	0	58	25	0		

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	29/12/2015			58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

This section lists all of the data sources for whom a data return is expected for the collection (unless a filter has been applied).

Agent functions



This section contains the functions that an agent (local authority) can use to manage the returns it is responsible for.

Loading a return for a single school

1) Click on the school you wish to load data for and click on the upload return for selected source button.

Performance summary						Errors		
Expected	Outstanding	Submitted	Approved	Authorised	E	Q	OK	
41	40	0	1	0	58	25	0	

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	29/12/2015			58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

2) Use the browse button to locate the XML file. Highlight the file name and click on open to select the return.

3) Click on the upload button to load the return.

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

Uploading School1.xml

FILE UPLOAD PROGRESS ...

Data return upload in progress, please wait...

Loading raw return data, 243 elements processed

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

FILE UPLOAD PROGRESS ...

Your data return has been successfully loaded and is queued for validation. Please return later to view any validation errors identified.

This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

4) Press the ok button to return to the agent main page.

During periods of heavy demand, there may be a delay before the return is validated. Whilst the return has a status of "waiting_for_validation" then the return cannot be viewed or edited.

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

The only difference being that when an local authority uploads a return then the status will be set to 'submitted'. When a school uploads a return the status will be set to 'loaded & validated'.

Once the return has been validated, the return status section on the source main page will display "submitted" and the date. The total number of errors and queries found in the return will also be displayed. Additional function buttons will also be available in the return management section.

MY SOURCES

Filter By: Name Native ID Status Org Group Queue

Performance summary		Submitted		Approved		Authorised		Errors		
Expected	Outstanding							E	Q	OK
41	40	1		0		0		58	24	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Errors	Queries	OK Errors
5204001	TDU Test Secondary 1	Submitted	21/12/2015				58	24	0	
5201028	SA Test NA Region School	No_Data					0	0	0	
5201001	SA Test School 1	No_Data					0	0	0	
5201010	SA Test School 10	No_Data					0	0	0	
5201011	SA Test School 11	No_Data					0	0	0	
5201012	SA Test School 12	No_Data					0	0	0	
5201013	SA Test School 13	No_Data					0	0	0	
5201014	SA Test School 14	No_Data					0	0	0	
5201015	SA Test School 15	No_Data					0	0	0	
5201016	SA Test School 16	No_Data					0	0	0	

Page 1 of 5 2 3 4 5

Uploading multiple files

Local authorities can load multiple return files in a single transaction, rather than having to load each file individually. Before the facility can be used all files to be loaded must be placed in a zip file.

To access the facility, click on the upload multiple returns (zip file) button.

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
41	40	1	0	0	E	Q	OK
					58	25	0

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Amended_by_agent	21/12/2015				58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Click on the browse button to navigate to the zip file in explorer (examplezipfile.zip) that you want to upload.

Once found, click on the upload button to load the data into COLLECT. After the upload has been initiated a progress screen may be displayed, which will show details of the files as they are being loaded.

File Name	Level Tag	Level Value	Organisation Type	Native ID Tags	Native ID	Source Organisation	Upload Result
-----------	-----------	-------------	-------------------	----------------	-----------	---------------------	---------------

Once a file is validated a results screen will show whether the file was successfully loaded.

Viewing the return details

Select a return from the 'agent' screen by clicking on school row and click on 'open return' to view it.

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	1	0	0	58	25	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Amended_by_agent	21/12/2015				58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5 1 2 3 5

You can view the return details by clicking on the various 'view all' links at the bottom of the screen.

School	View All
Pupils on Roll	View All
Pupils No Longer on Roll	View All

When you click on the 'view all' for pupils on roll this takes you into the pupil section. This displays the 'records; list', with all pupils visible. You can use the filter bar to identify a particular pupil. Or click on the headers to sort alphabetically.

UPN	Surname	Forename	DOB	Pupil Enrolment Status	Pupil Errors	Address	Termly Sessions	Summer Sessions	Annual Sessions	Exclusions	Post 16	FSM
-----	---------	----------	-----	------------------------	--------------	---------	-----------------	-----------------	-----------------	------------	---------	-----

Editing data within the return

The default view when a screen is displayed is 'view' mode. To edit the details click on the 'edit' button.

SC16 Summer

All Errors All Notes Add View Edit Delete Status

SC16 Summer [4]

- Levels
- School [26]
 - Characteristics
- Pupil On Roll [40]
 - Characteristics
 - Identifiers
 - Status
 - Termly Attendance
 - Termly Exclusions [2]
 - Termly Session Details
 - Addresses [2]
 - Learner Support
 - Free School Meals Period [3]
- Pupils No Longer On Roll [3]
 - Characteristics
 - Identifiers
 - Status
 - Termly Attendance
 - Termly Exclusions [2]
 - Termly Session Details
 - Learner Support

SC16 Summer - Test Organisation 42

Return Level Errors		Errors		OK Errors	Return Level Notes
		E	Q		
		1	12	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Summer 2016					
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-05-19	2	0	0	
Source Level	S	0	0	0	
LA	001	1	0	0	
Estab	2008	1	0	0	
Software Code	MadeItUp	0	0	0	
Release	1.0	0	0	0	
Xersion	1	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-06-23 09:56:58	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

This enables data fields to be manually edited within COLLECT. Please note: Any changes made within COLLECT should always reflect the schools MIS.

Please see separate guide on editing school census data for full instructions on how to change data.

Errors

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

All errors and queries are highlighted in red against the relevant data item.

There are two levels of errors, 'return level' and 'data item level'

Total return errors

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

Filter By:		Name	Native ID	Status	Org Group	Queue	Go	Reset	
Performance summary									
Expected	Outstanding	Submitted	Approved	Authorised	Errors				
41	40	0	1	0	E	Q	OK		
					58	25	0		
Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015			58	25	0
5207008	TDU Test Special 1	No_Data					0	0	0

Return level errors

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

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

To view all errors and queries on the return

1) Click on 'all errors' at the top of the screen.



2) You will then be shown a list of all errors and queries relating to your return. Click on the details button to see which data items the validation is checking, these will show to

the right of the screen. If you click on one of the underlined fields you will be directed to the corresponding data item in the return.

BLADE UAT COLLECT Portal						
Blade Error Report - SchoolCensus 2016_Summer						
Test Organisation 24		Error report on 15/04/2016 at 12:25			Count 59	Return Details
Rule No.	Return Level	Error Message	Priority OK'd	Notes	Field	Value
2290		Exclusion Start Date invalid	Errors	Details		
262		If School Governance is recorded as an Academy (CA) then School Type must also be recorded as an Academy (49)	Errors	Details		
		Pupil with UPN missing	Errors	Details		
		Pupil with last name missing	Errors	Details		
		Pupil with forename missing	Errors	Details		
		Pupil with date of birth missing	Errors	Details		
		Pupil part-time indicator is missing or invalid	Errors	Details		
1880		Pupil's entry date to school missing or after Census date	Errors	Details		
		Invalid Code Value	Errors	Details		
1610		Pupil gender missing or invalid	Errors	Details		
Page 2 of 6					1 2 3 4 5	

Correcting errors

Identify which of the fields contains the incorrect value and return to the screen that contains it by clicking on the field value in the details section.

Either:

- 1) Contact the relevant school – advise they need to correct in their MIS and re-load their school census file to COLLECT, overwriting the incorrect one.
- 2) Change the mode of the form to 'edit' and then click on the data item that needs to be changed and update it – ensuring the school reflect this change in their MIS
- 3) As schools can now edit their own data the third option is - contact the relevant school and ask them to 'edit' the data, reflecting in their MIS, ensuring they re-submit their data on COLLECT.

Providing clarification/ supplementary information

In some instances you will be requested to provide explanatory information (as part of email communications you will receive a document which will provide guidance on what notepad explanation would be expected for individual queries. This will also be made available on our web page [School Census 2016](#)) about a data value when an item has an associated query against it.

If a notepad entry is not returned the EDD Helpdesk will have to contact the local authority for further information.

You can add notes in “return level notes query.

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

The screenshot shows the 'SC16 Summer - Test Organisation 42' interface. It features a sidebar on the left with a tree view of categories like 'Levels', 'School', 'Pupil On Roll', etc. The main area displays a table of 'Return Level Errors' and a detailed table of 'School Census Summer 2016' data items. The 'Return Level Errors' table has columns for 'Errors' (E, Q), 'OK Errors', and 'Return Level Notes'. The 'School Census Summer 2016' table has columns for 'Data Item', 'Value', 'Errors' (E, Q), 'OK Errors', and 'History'. A pen icon is visible in the 'Return Level Notes' column of the first row.

		Errors		OK Errors	Return Level Notes
		E	Q		
		1	12	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
Collection	SC	0	0	0	
Term	SUM	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-05-19	2	0	0	
Source Level	S	0	0	0	
LA	001	1	0	0	
Estab	2008	1	0	0	
Software Code	MadeItUp	0	0	0	
Release	1.0	0	0	0	
Xversion	1	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-06-23 09:56:58	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

- 2) Click add new note

The screenshot shows the 'Note Detail' form. At the top right, there are two buttons: 'Add New Note' and 'Remove Note'. The 'Add New Note' button is circled in red. Below the buttons is a large text area for entering the note. At the bottom, there is a section for 'Preserved notes deleted by resubmissions' with a table of columns: 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. A 'Remove Preserved Note' button is also present.

- 3) Type your note and the error number in the box provided and click create.



Please ensure there is a note for all queries/errors remaining on your schools return.

You can enter one note to cover numerous queries.

E.g. – 3 x 2020Q – confirmed correct, 1 x 1780Q – confirmed correct, 2 x 2502Q – Pupils are dually registered and did not attend this establishment in spring term

Approving the return

The local authority is responsible for 'approving' the return once the school has 'submitted' it. The local authority is expected to investigate and resolve any outstanding return errors before approving a return. By approving the return the local authority have indicated that the return has been checked for accuracy and completeness and therefore authorising the submission to be used by the department.

To 'Approve' a return:

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

Performance summary

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	1	0	0	58	24	0

Sources

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Amended_by_agent	21/12/2015				58	24	0
5207008	TDU Test Special 1	No_Data					0	0	0

Page 4 of 5

1 2 3 5

Once selected, approve the return by clicking the approve (approve the highlighted single return) or approve all (approves all returns at submitted stage) button.

Screen information will be updated:

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

Performance summary							
Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	0	1	0	58	24	0

Sources									
Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data				0	0	0	
5202018	TDU Test Primary 2	No_Data				0	0	0	
5201100	TDU Test PRU 1	No_Data				0	0	0	
5204077	TDU Test Secondary 2	No_Data				0	0	0	
5206924	TDU Test CTC 1	No_Data				0	0	0	
5206001	TDU Test Independent 2	No_Data				0	0	0	
5201046	TDU Test Nursery School 2	No_Data				0	0	0	
5201101	TDU Test PRU 2	No_Data				0	0	0	
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015		58	24	0	
5207008	TDU Test Special 1	No_Data				0	0	0	

Page 4 of 5 1 2 3 5

<input type="button" value="Open Return..."/>	<input type="button" value="Approve..."/>	<input type="button" value="Approve All..."/>	<input type="button" value="Unapprove..."/>	<input type="button" value="Reject..."/>	<input type="button" value="Delete..."/>	<input type="button" value="Export Selected..."/>	<input type="button" value="Export Multiple..."/>	<input type="button" value="Export All..."/>
<input type="button" value="Upload Return for selected Source..."/>	<input type="button" value="Upload Multiple Returns (zip file)..."/>		<input type="button" value="Agent Administration..."/>			<input type="button" value="Academy Export..."/>		
<input type="button" value="Validate Selected Return..."/>	<input type="button" value="Validate All Non-validated Returns..."/>							
<input type="button" value="Launch Reports..."/>	<input type="button" value="Queue Management..."/>	<input type="button" value="Change Queue..."/>	<input type="button" value="Move to this queue -->"/>					

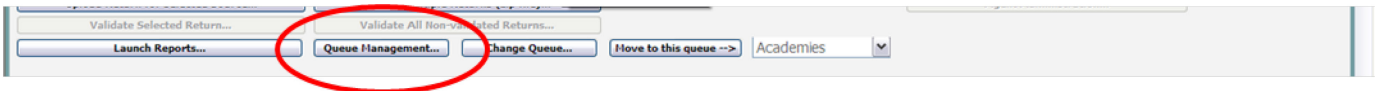
- The status of the return will be set to 'approved' and the 'date approved' will be completed
- The 'approved' total in the performance summary will increase by 1 and the 'submitted' count will decrease by 1
- The approve button will now be disabled for this return
- The unapprove button will now be enabled.

Queues

When a number of people are working on census files, the use of the 'queue' facility can help effective working.

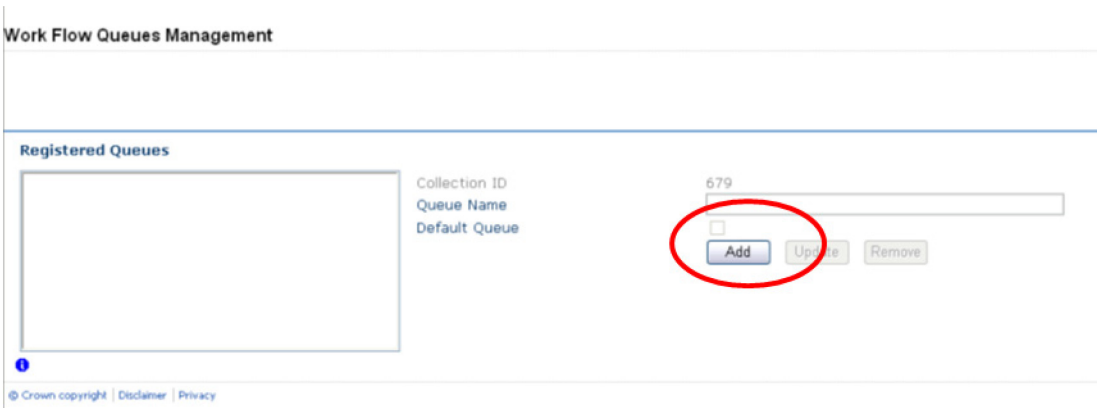
The use of 'queues' helps in the allocation and identification of who is working on which files and therefore helps to ensure that two or more people don't try and work on the same file.

From the agent page click the queue management button.



This will take you to the page entitled 'work flow queues management'

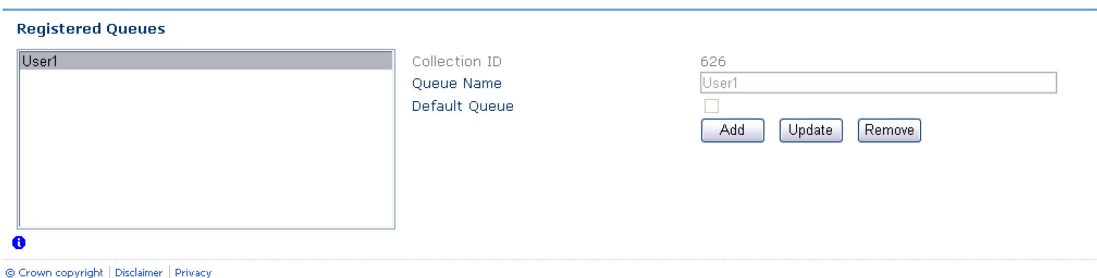
To add a name, click the add button.



Type your name (or the name of a colleague) into the 'queue name' box then click ok. (Instead of a name you may wish to apportion schools by a day of week or by some other description depending on your local authority's validation procedures).

The name/description will now be displayed in alphabetical order in the 'registered queues' box.

Work Flow Queues Management



Use the update button to modify a selected name/description.

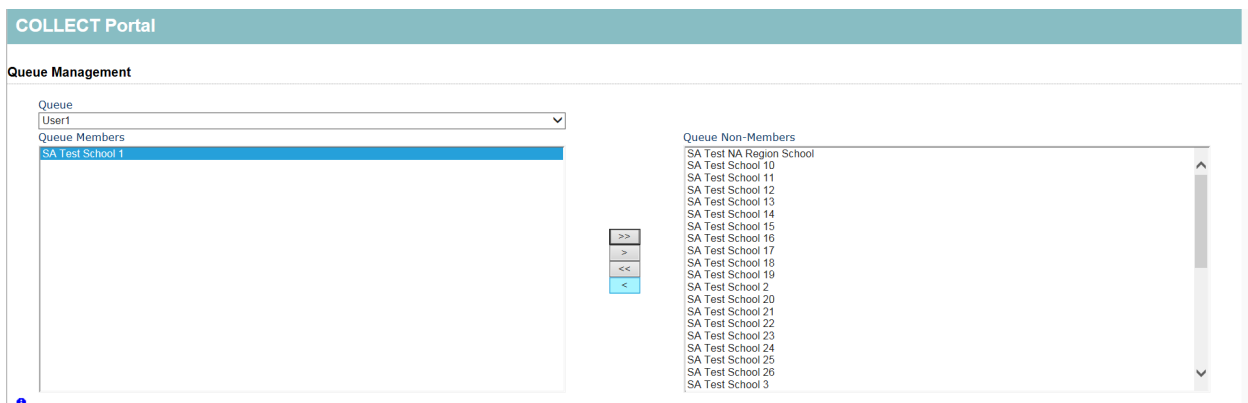
The remove button allows you to remove a name/description from the 'registered queues' list. However, this can only be done if any schools linked with a particular name are removed first.

NB: The check-box used to set the 'default queue' was originally intended to allow a default queue to be allocated for a workflow stage; however the emerging requirement for the use of queues is for local authority's to assign their own, as they work in different ways. It is therefore not applicable and has no effect on queues.

Return to the agent page by selecting back to my COLLECT page at the top of the page and click the change queue button to go to the screen entitled 'queue management'

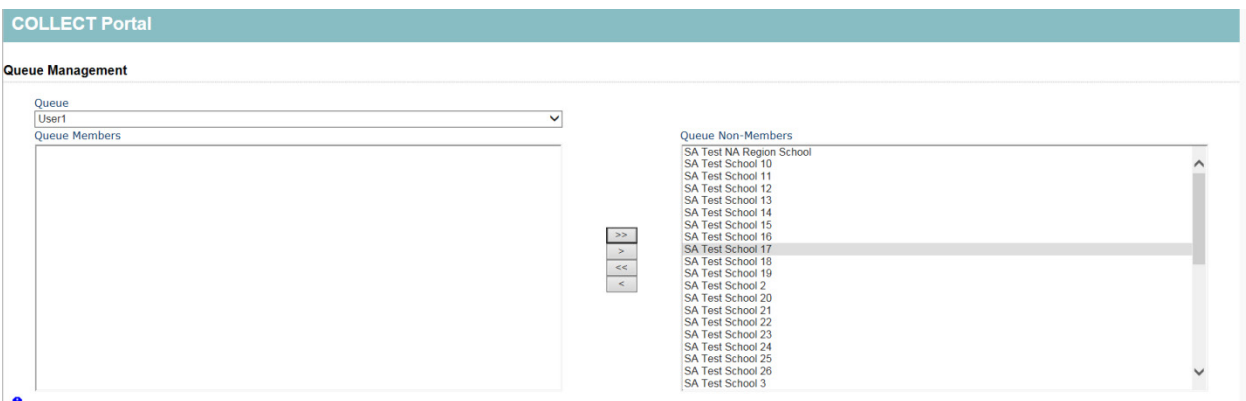


You can now select and add or remove schools to and from different queues (click the right hand down arrow alongside the 'queue' box to see a drop down list of names).



Highlight a school in the 'queue non-members' box and press the < button. This school will now appear in the box of 'queue members'.

< or > will move individual schools or a group of schools selected in the direction of arrow. << or >> will move all schools in direction of arrows (although you will first be prompted to confirm this global move).



Return to the agent page by selecting back to my COLLECT page at the top of the page and you will see that selected school has now been assigned to the selected queue.

* An alternative way to attach a school to a particular person is to highlight the school (under 'source name') then click the move to this queue button. This can be a safer way to allocate schools to queues because you can see if any schools are already allocated to another queue first.



Reports

1) A number of reports are available on COLLECT, return to the agent page and click on the launch reports button.

The screenshot shows the COLLECT system interface. At the top, there is a 'Filter By:' section with fields for Name, Native ID, Status, Org Group, and Queue, along with 'Go' and 'Reset' buttons. Below this is a 'Performance summary' table:

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	0	1	0	58	24	0

Below the performance summary is a 'Sources' table:

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors		
							Errors	Queries	OK Errors
5202000	TDU Test Primary 1	No_Data					0	0	0
5202018	TDU Test Primary 2	No_Data					0	0	0
5201100	TDU Test PRU 1	No_Data					0	0	0
5204077	TDU Test Secondary 2	No_Data					0	0	0
5206924	TDU Test CTC 1	No_Data					0	0	0
5206001	TDU Test Independent 2	No_Data					0	0	0
5201046	TDU Test Nursery School 2	No_Data					0	0	0
5201101	TDU Test PRU 2	No_Data					0	0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015			58	24	0
5207008	TDU Test Special 1	No_Data					0	0	0

At the bottom of the screenshot, there is a toolbar with various actions: Open Return..., Approve..., Approve All..., Unapprove..., Reject..., Delete..., Export Selected..., Export Multiple..., Export All..., Upload Return for selected Source..., Upload Multiple Returns (zip file)..., Agent Administration..., Academy Export..., Validate Selected Return..., Validate All Non-validated Returns..., Launch Reports..., Queue Management..., Change Queue..., and Move to this queue -->.

2) A drop down menu will be display and a report can be selected from that drop down list

It is extremely important that you run all of these reports as they may highlight anomalies within the data which can impact on all funding calculations.

Duplicate reports will indicate pupils who are registered at more than one school and therefore would indicate if the pupil should remain on roll or whether the registration status has been recorded incorrectly.

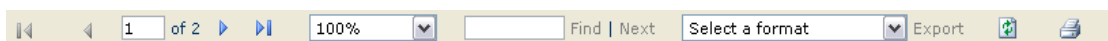
In spring and autumn school census collections these duplicates would be required to be resolved. Failure to resolve duplicates in these collections will impact on the funding calculations for your local authority/schools as each pupil is funded only once.

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

School Census 2016

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

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



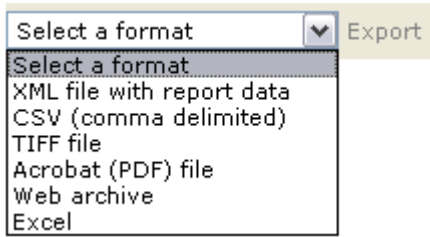
These are explained as follows:

Allows you to navigate between pages of the report.

Zoom control for viewing the report at various zoom levels.



Allows you to enter text to find on the report.



Clicking the drop-down menu, results in the display of a list-box showing various formats in which you can export the report. Select one of the formats, click the export button and you will then be prompted to 'open' or 'save' the output file. Click on the 'save' button to save the report file.



Refreshes the report output.



Produces a hard-copy output of the report – If this does not print please export to excel and print from there.

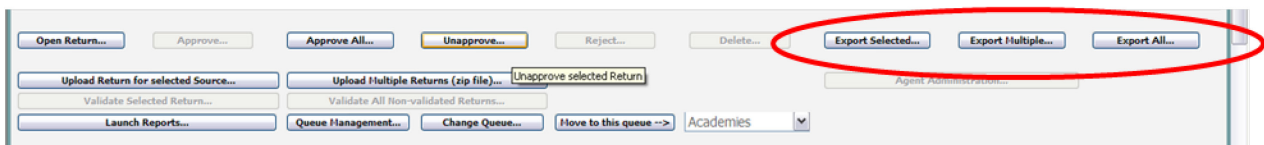
Exporting a return

A return can be exported in xml or csv format

Exporting a return (Current state)

On the agent page there are three export options.

- 1 Export selected – one school
- 2 Export multiple – up to 10 schools
- 3 Export all – all schools



Export selected

- 1) Click on the school you wish to export – highlighting it
- 2) Click on Export Selected button

Export multiple

- 1) Click on export multiple button
- 2) Select schools you wish to export by moving over to the right hand box
- 3) Click export selected sources

Export all

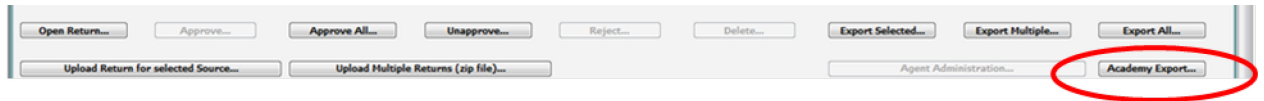
- 1) Click on export all

Academy export

Local authorities have a function within COLLECT to export all 'authorised' academy data, there is a report available in COLLECT which will provides details of which academies have been authorised by the department. It is strongly recommended you run this report prior to exporting. Regulations do provide DfE with the legal power to share information on academies, any such sharing has to be in accordance with the Data Protection Act (DPA). In particular condition 5(b) of schedule 2, that is, the disclosure of information is necessary for the exercise of a statutory function by a person, in this case the local authority.

In light of this requirement, the DfE currently only has legal permission to share a subset of academy data direct with local authorities, anything not contained within the export the department for education are unable to share.

- 1) Click on academy export



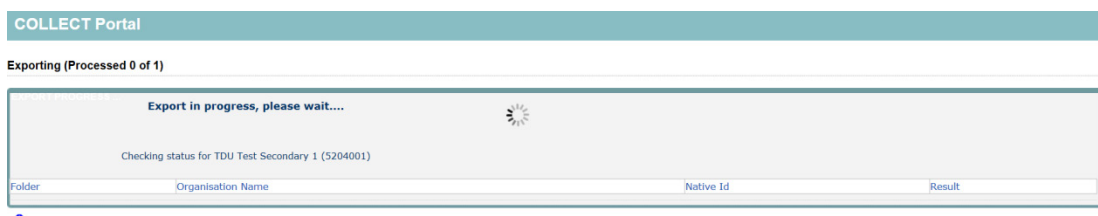
Selecting format

Once you have clicked one of the three options above and followed any instructions the following screen will be displayed.

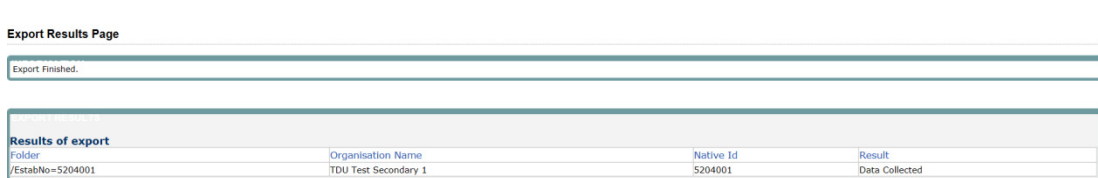
- 1) Choose to export in either xml or csv format, then click on the export button.

A screenshot of a dialog box titled 'CHOOSE EXPORT FORMAT'. The dialog contains the following text: 'Export the current data for the selected Source', 'Please select the format that you wish to export this data:', 'Export as XML' (selected with a radio button), 'Export as CSV', 'Please Select the Status that you wish to export this data: Either:', 'All' (checked with a checkbox), 'Or one or more of the following', 'Loaded', 'Amended by source', 'Submitted', 'Amended by agent', 'Approved', 'Amended by collector', 'Authorised'. At the bottom of the dialog, there is a blue 'Export' button with a right-pointing arrow, which is circled in red.

- 2) A progress message will be displayed



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

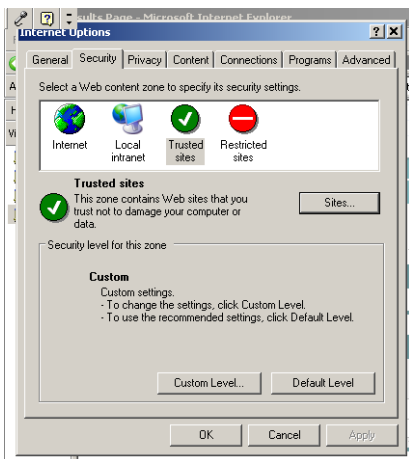


Important note: if the export process fails, with a message stating that Internet explorer has blocked download of a file, you might succeed if you try again.

On the second attempt, hold down the Ctrl key down continuously from before you click on export until after you see the resulting files displayed in windows explorer. If this is still not successful, you will have to adjust the security settings on your internet browser.

Adjusting security settings

The security settings on your pc may prevent the 'file download' appearing If this is the case then go into the 'tools' menu option at the top of the screen.



Select 'internet options' from the drop down menu.

Select 'security' from the option buttons

Selected 'trusted sites'

Select 'sites'

The select 'add' and type the following into the text box in turn:

<https://collectdata.education.gov.uk/CollectPortalLive/MainPage.aspx>

<https://sa.education.gov.uk/idp/Authn/UserPassword>

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

Screen functionality

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

Screen navigation

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.



Navigation controls

To navigate through the system links are provided on all pages either as back or drill up options, please use these links to navigate between screens when using the system.

Control	Usually located	Action
Back to my COLLECT page	All screens within a return except the main page which shows back to home page	Returns you to the main page for your user role (agent, source etc.)
Drill up	Any data screen within a return apart from the header screen	Returns you to the previous data screen
Return	Report screens, e.g. history and errors	Returns you to the previous screen
Back	Notes screens	Returns you to the previous screen
View all	Data entry screens that have additional linked data.	Takes you to the sub module level details

Mode buttons

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



Dark grey text on sunken button with light border = 'Active' mode

Black text on button and highlighted border = 'Available' mode

Light grey text on button with light border = 'Unavailable' mode

Help

If you do not have access to COLLECT for school census you will need to complete the service request form, also if you have any queries regarding school census or have a change to your contact details please could you complete [Service Request form](#).



Department
for Education

© Crown copyright 2016

This publication (not including logos) is licensed under the terms of the Open Government Licence v3.0 except where otherwise stated. Where we have identified any third party copyright information you will need to obtain permission from the copyright holders concerned.

To view this licence:

visit www.nationalarchives.gov.uk/doc/open-government-licence/version/3

email psi@nationalarchives.gsi.gov.uk

write to Information Policy Team, The National Archives, Kew, London, TW9 4DU

About this publication:

enquiries www.education.gov.uk/contactus

download www.gov.uk/government/publications

Reference: DFE-00243-2015



Follow us on Twitter:
[@educationgovuk](https://twitter.com/educationgovuk)



Like us on Facebook:
facebook.com/educationgovuk