School census 2015 to 2016

COLLECT guide for maintained schools

May 2016

Contents

COLLECT and secure access

Access to COLLECT is through the department's secure access system (SA)
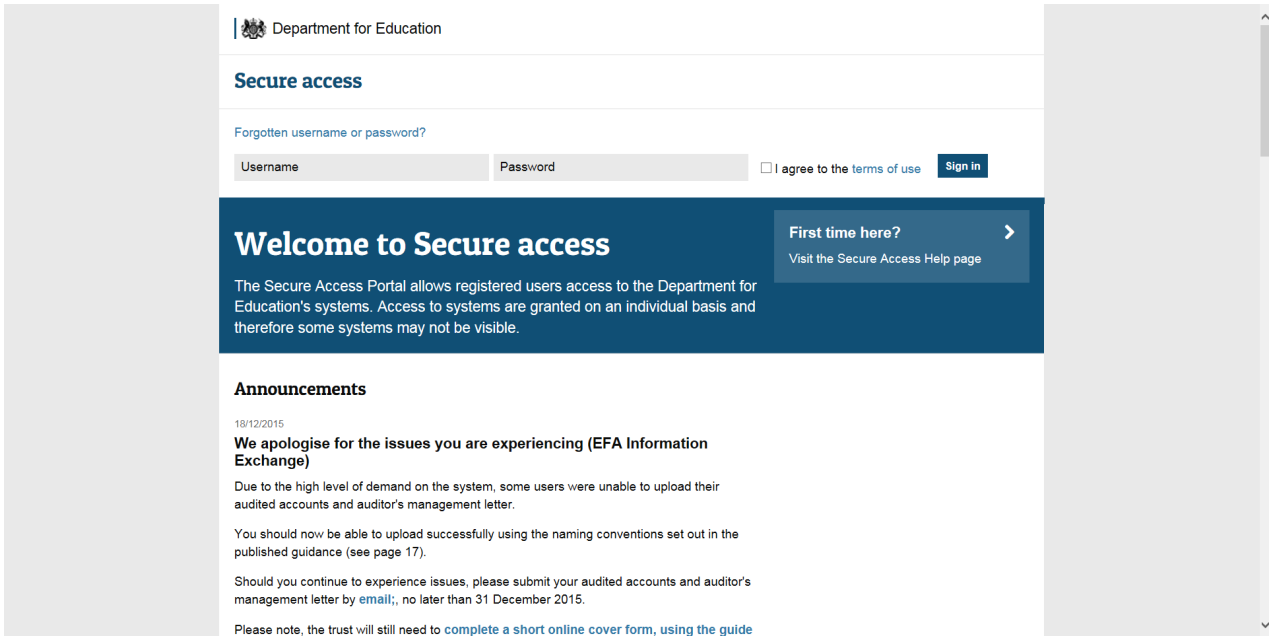
Full secure access guides are published on the Secure Access Website.
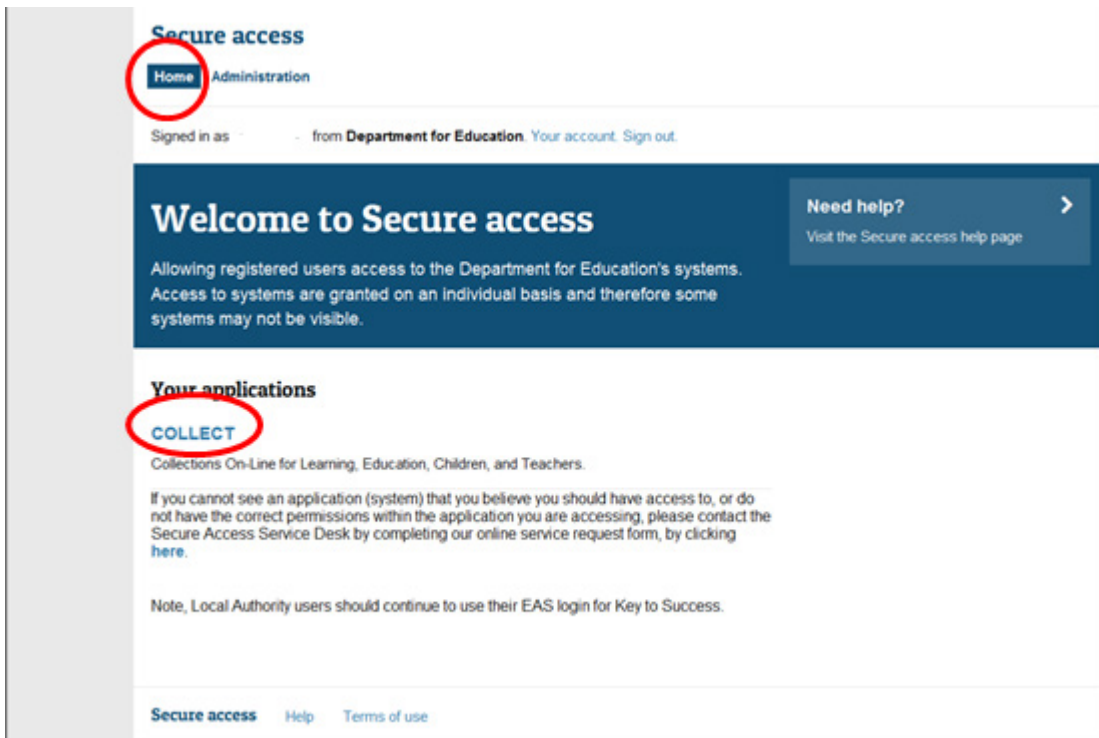
Once successfully registered, click on to 'home' and then click on 'COLLECT' to enter COLLECT as below.

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

Select the collection 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.

Source

The source (school) main screen will now be displayed.

MY DATA RETURN

The status of your data return : `No_Data`

Errors : `0`   Queries : `0`   OK Errors : `0`

What can I do with My Data Return?

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

I need some help

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

Loading a return

1) Click on upload return from file
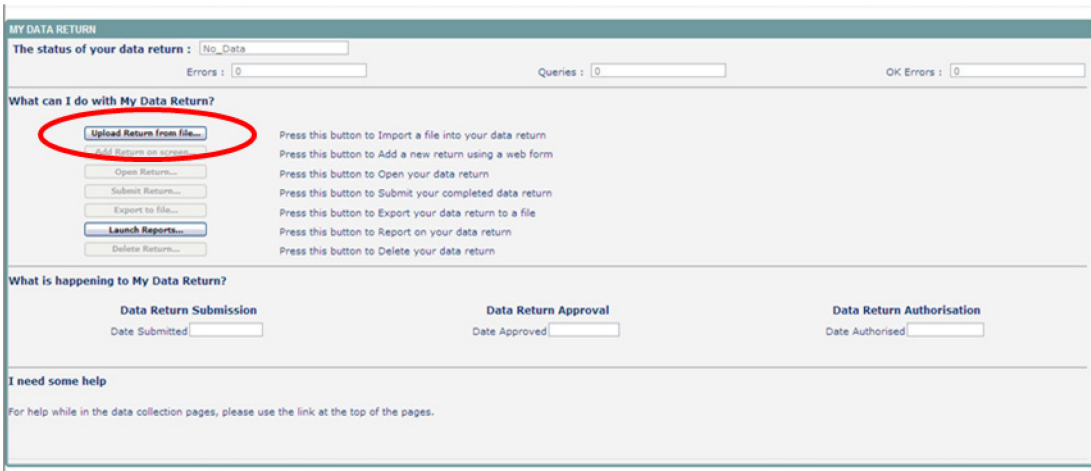
2) Use the browse button to locate the xml file. Highlight the file name and click on 'open' to select the return.
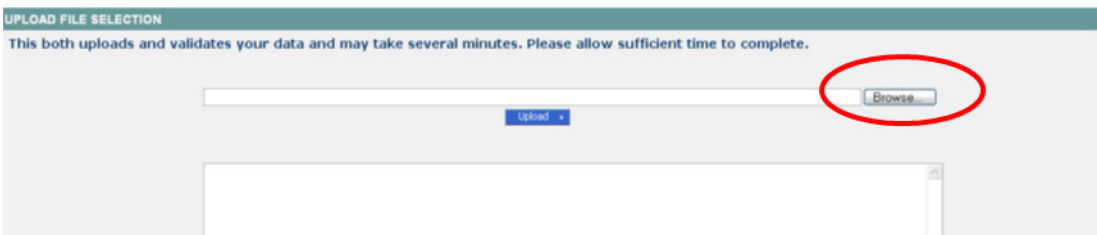
3) Click on the upload button to load the return.
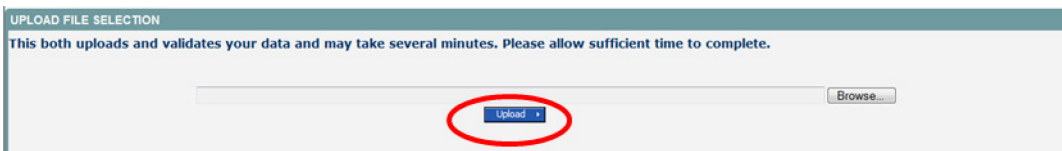
A progress message may be displayed while the upload is taking place.

Once the return has been loaded, the following message will be displayed on screen.
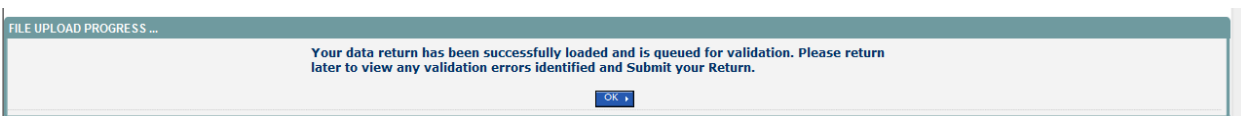
This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

4) Press the 'OK' button to return to the source main page.

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

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

Once the return has been validated, the return status section on the source main page will display "loaded and validated". The total number of errors and queries found in the return will also be displayed.
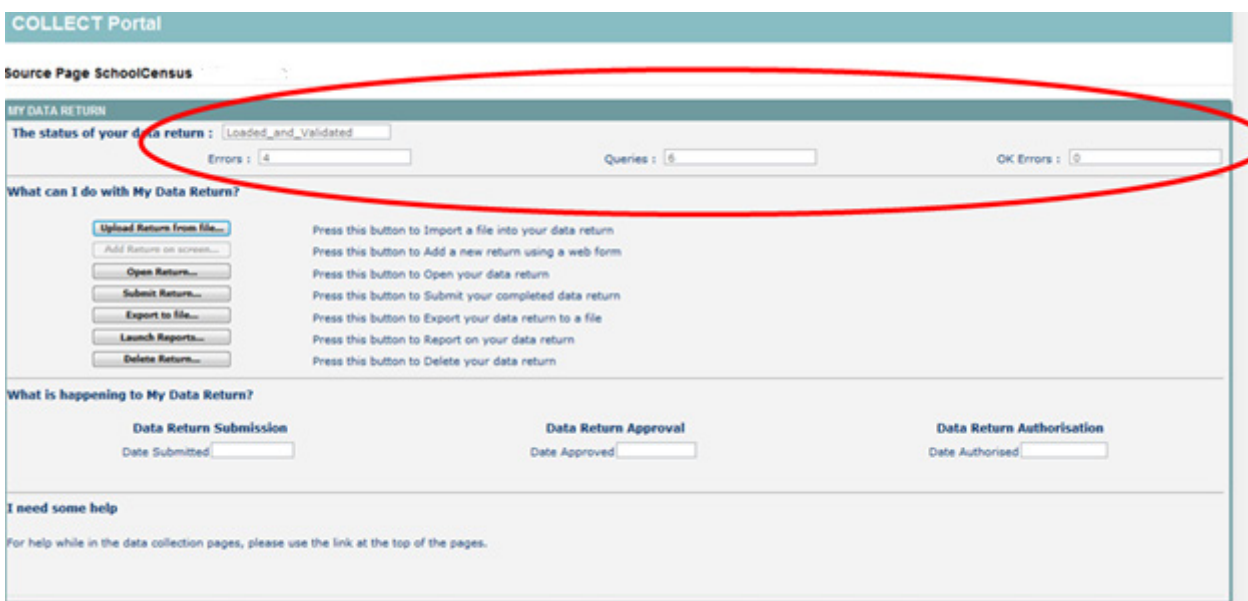
Viewing the return details

1) To view your data return click on 'open return'.
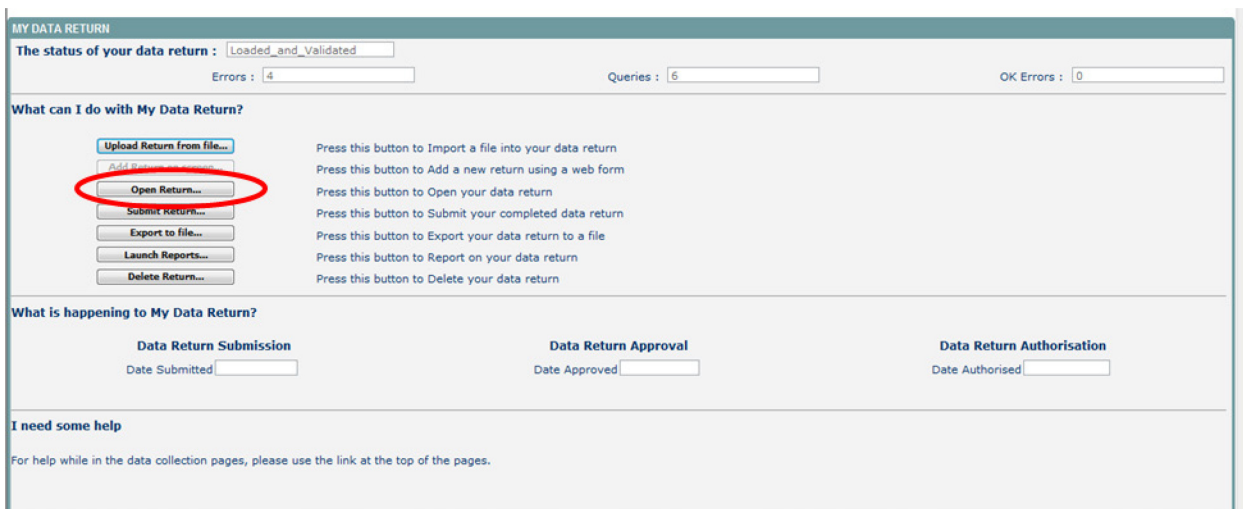
Your return will then be displayed
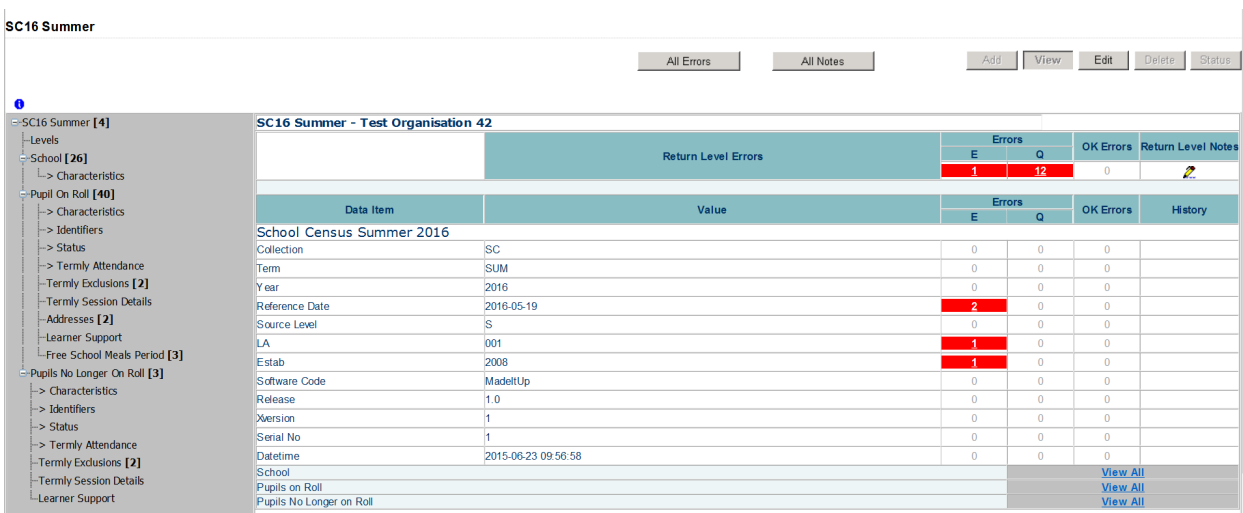
You can view the return details by clicking on the various 'View All' links at the bottom of the screen.

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.
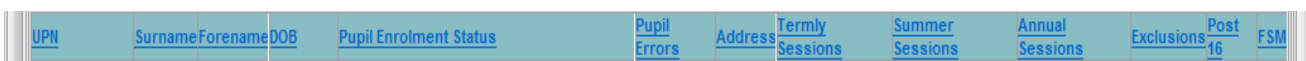
Editing data within the return

The default view when a screen is displayed is 'view' mode. We have enabled editing at school level for all school census returns.

Please consult with your local authority regarding editing of your return to agree local responsibilities and/or processes for amending data directly in COLLECT*.*

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

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.
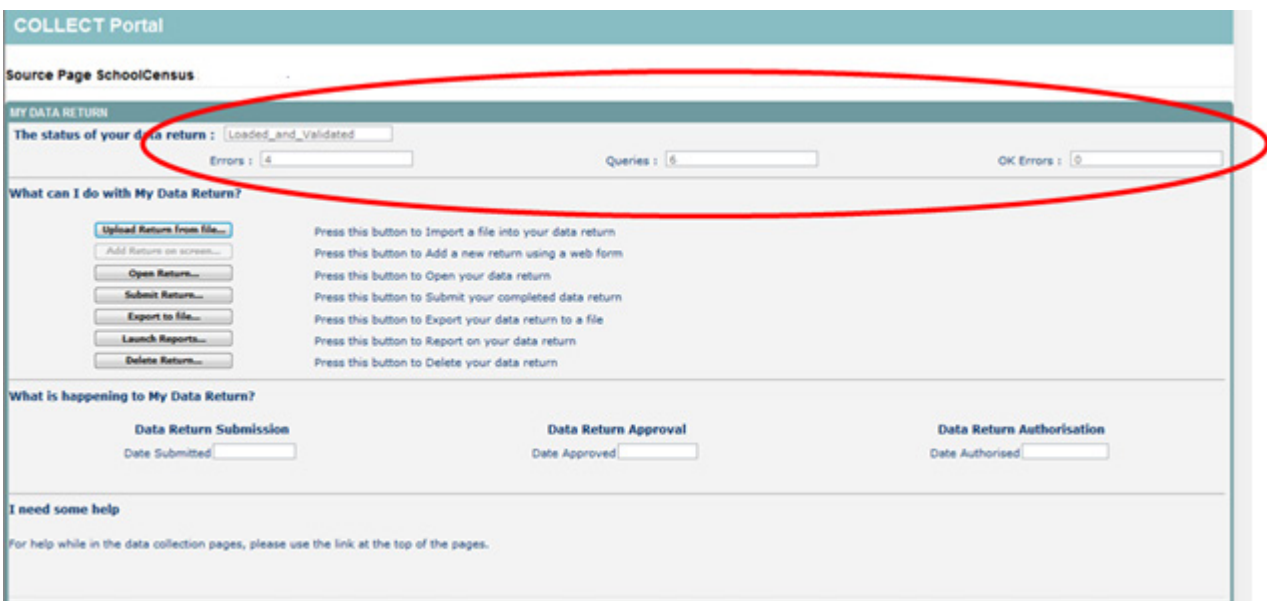
Return level errors

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.

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.

Correcting errors

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

Either:

1) Correct in your MIS and re-load the school census file to COLLECT, overwriting the incorrect one.

2) If your local authority agrees - change the mode of the form to 'edit' and then click on the data item that needs to be changed and update it – ensuring the you reflect this change in the MIS.

Providing clarification/ supplementary information

In some instances you will be requested to provide explanatory information . This will be made available on our web page School Census 2016)

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

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

2) Click add new note

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 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.

Submitting the return

The school is responsible for 'submitting' the return once the data has been checked and any explanatory notes have been added. By submitting the return the school have indicated that the head teacher has checked the return for accuracy and completeness and therefore authorising the submission to be used by the department.

To 'submit' your return:

1) Go to the 'source main screen' and click on 'submit return'.
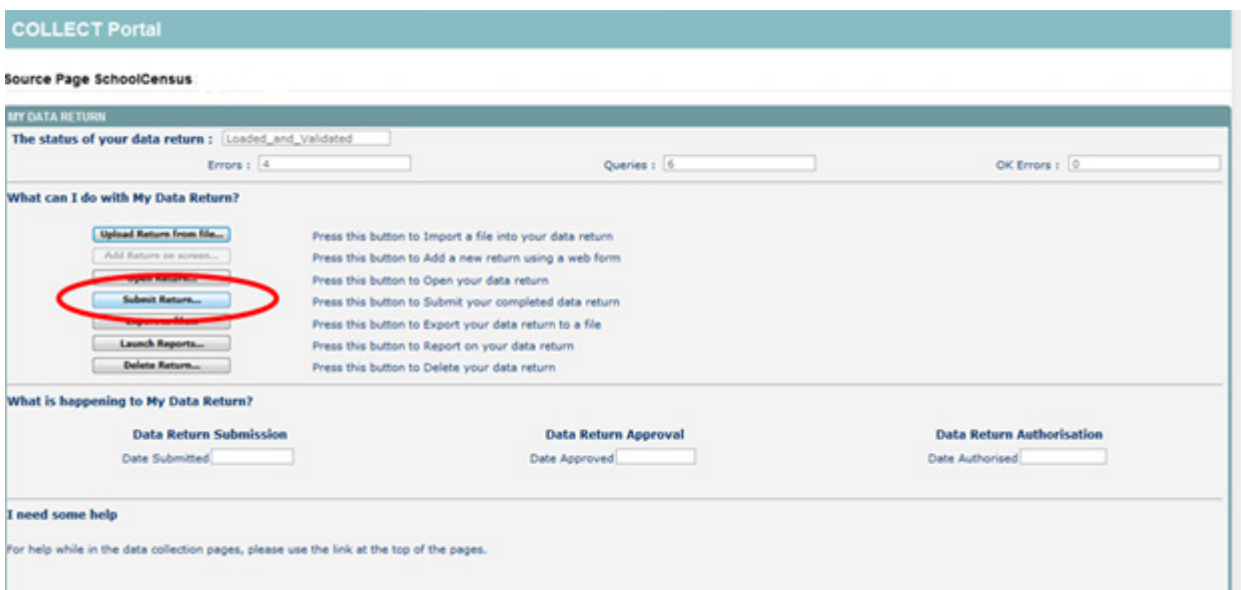
The screen will be updated

- The status of the return will be set to **'submitted'** and the **'date submitted'** will be completed

- The submit button will now be disabled for this return

COLLECT Portal

Source Page SchoolCensus

MY DATA RETURN

The status of your data return : Submitted

Errors :   Queries : 6   OK Errors : 0

What can I do with My Data Return?

Button	Description
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
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What is happening to My Data Return?

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Date Submitted	Date Approved	Date Authorised

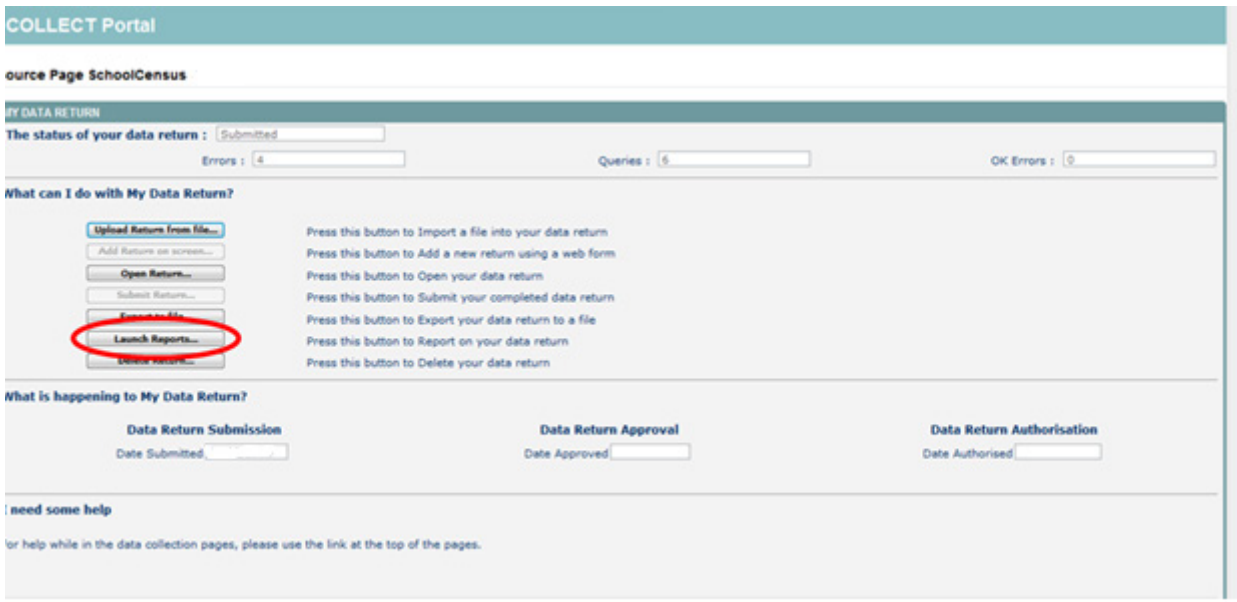**I need some help**

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

Reports

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

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

You should now run your reports and check that you agree with the listed figures. If you do not agree with the reported figures it could indicate that there is missing and/or incorrect data in your return. The local authority also has access to your reports and therefore you may consult them on any queries.

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

School Census 2016

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

Along the top of the report you will see a toolbar with various functions.
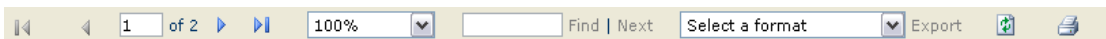
These are explained as follows:
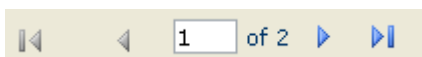
 Allows you to navigate between pages of the report.
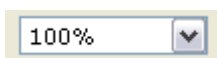
 Zoom control for viewing the report at various zoom levels.

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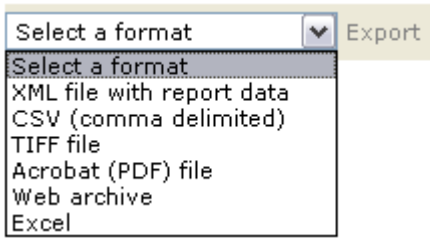
Clicking the drop-down menu, results in the display of a list-box showing various formats in which you can export the report. Select one of the formats, click the export button and you will then be prompted to 'open' or 'save' the output file. Click on the 'save' button to save the report file.

 Refreshes the report output.

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

Exporting a return

A return can be exported in XML or CSV format

Exporting a return (current state)

On the source page

1) Click on export to file
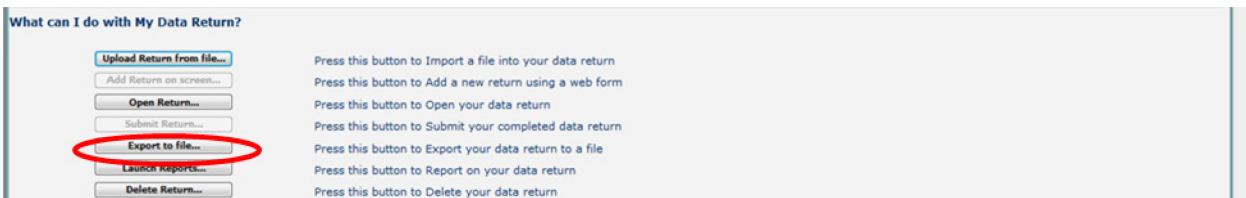
2) Choose to export in either XML or CSV format, then click on the export button.

3) A progress message will be displayed

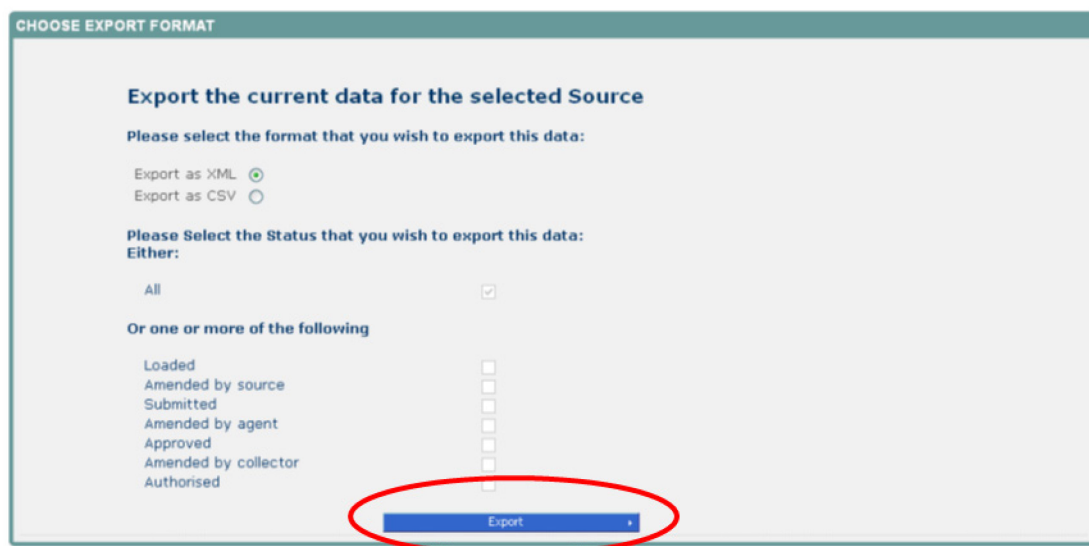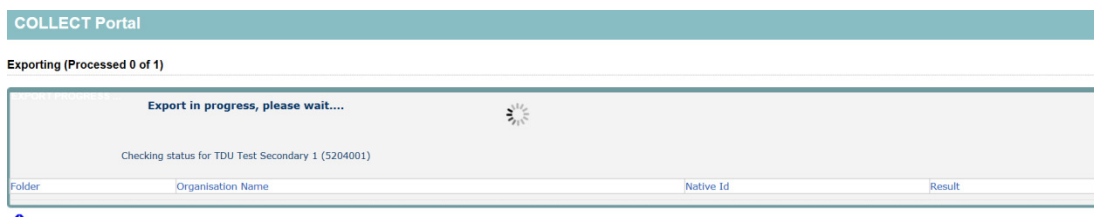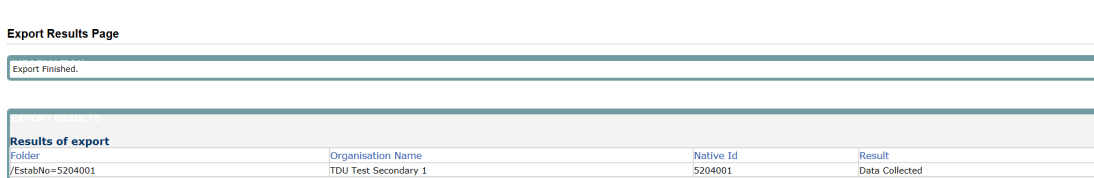When completed the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.

Important note: If the export process fails, with a message stating that internet explorer has blocked the 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.
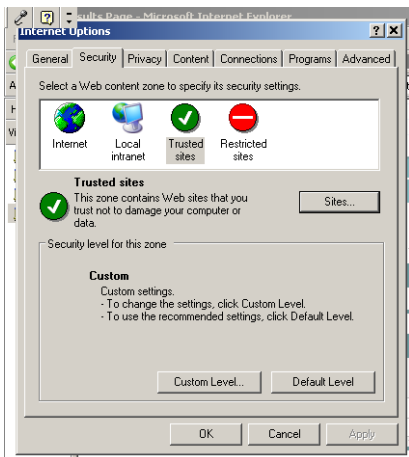
Select **'internet options'** from the drop down menu.

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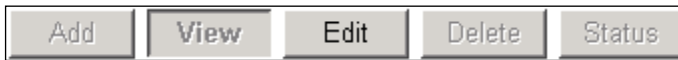
Dark grey text on sunken button with light border = 'Active' mode

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

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

Help

If you have any queries regarding school census in the first instance please contact your local authority.

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