



Department
for Education

School census 2015 to 2016

**COLLECT guide for academies, free
schools, studio schools, UTCs, CTC and
NMSS**

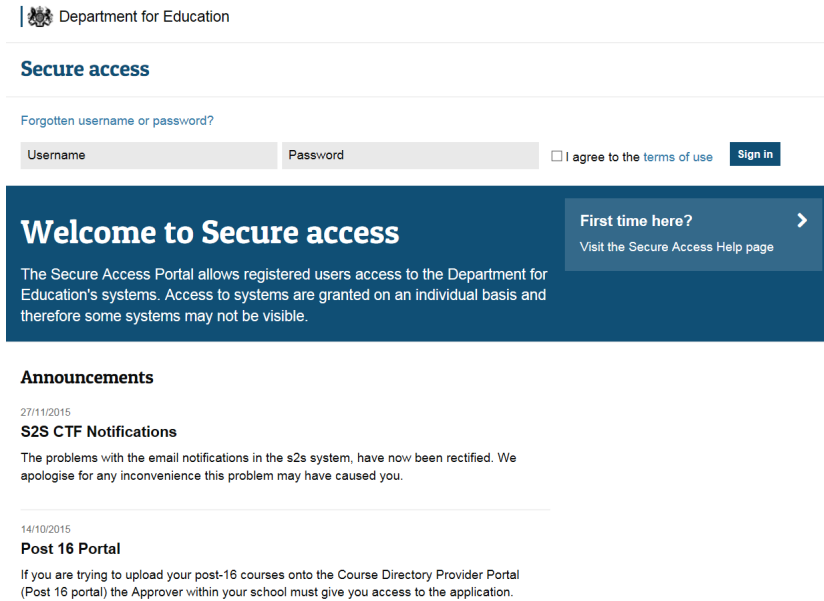
May 2016

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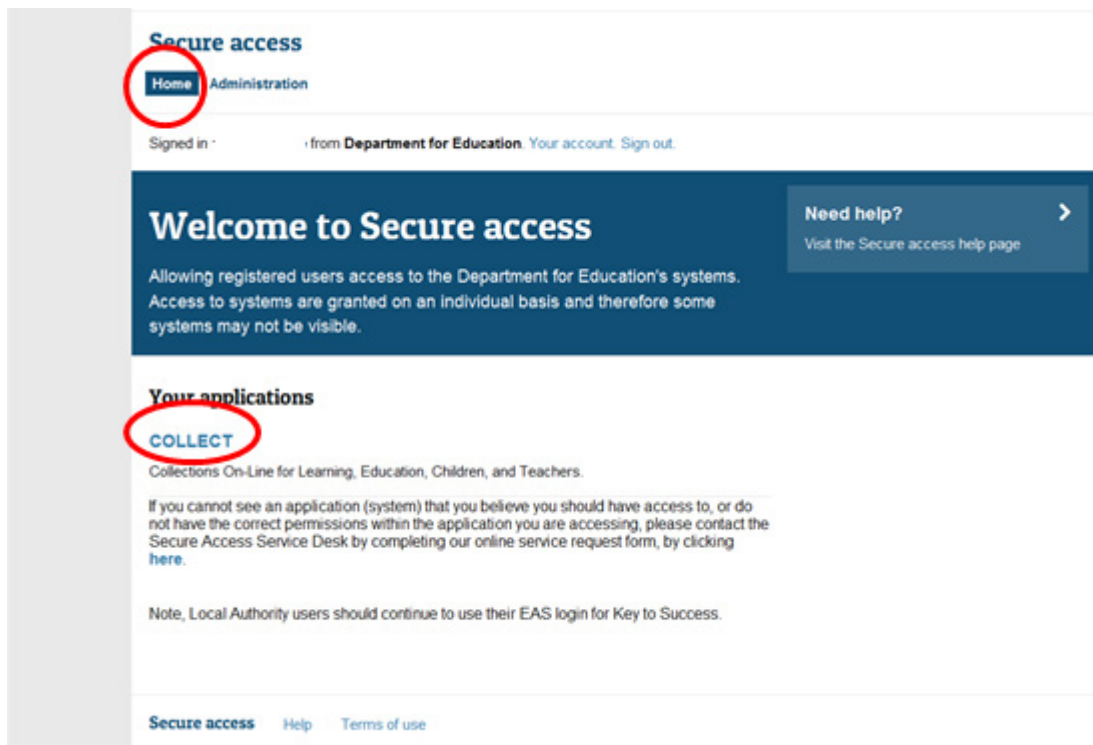
COLLECT and secure access

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.

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...](#)



MY DATA COLLECTIONS

Data Collection	User Role	Organisation	Status	Due Date	Days Due
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
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 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 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

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Select Data Collection

Select the collection you wish to open 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 :

Errors : Queries : OK Errors :

What can I do with My Data Return?

<input type="button" value="Upload Return from file..."/>	Press this button to Import a file into your data return
<input type="button" value="Add Return on screen..."/>	Press this button to Add a new return using a web form
<input type="button" value="Open Return..."/>	Press this button to Open your data return
<input type="button" value="Submit Return..."/>	Press this button to Submit your completed data return
<input type="button" value="Export to file..."/>	Press this button to Export your data return to a file
<input type="button" value="Launch Reports..."/>	Press this button to Report on your data return
<input type="button" value="Delete Return..."/>	Press this button to Delete your data return

What is happening to My Data Return?

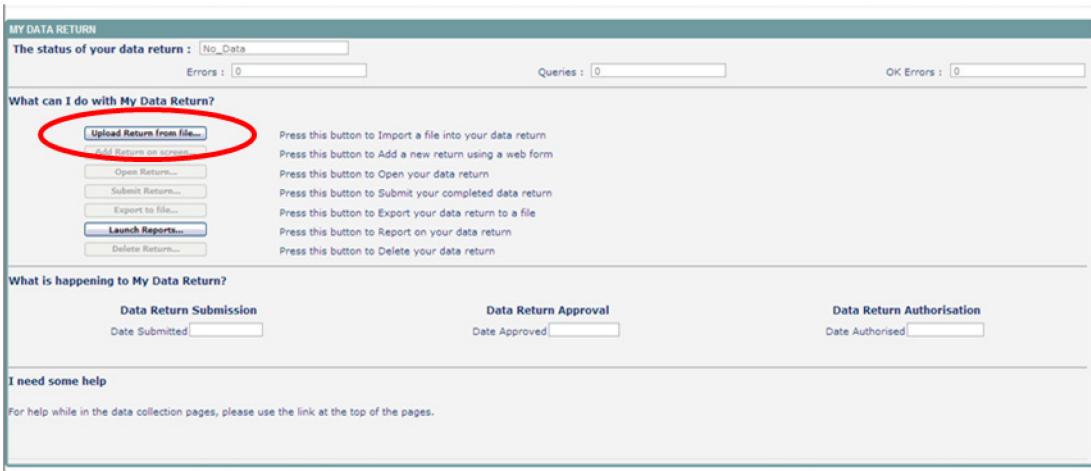
Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>

I need some help

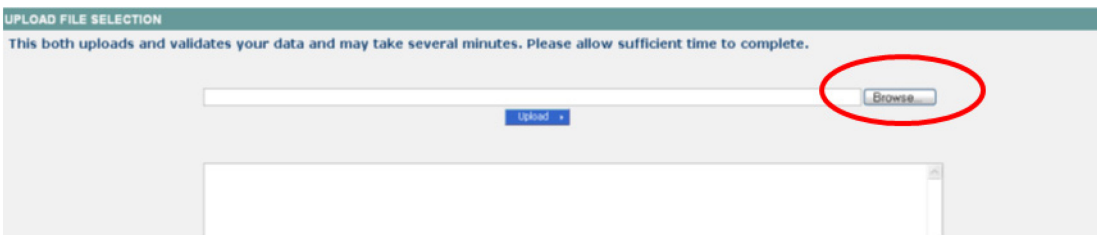
For help while in the data collection pages, please use the link at the top of the pages.

Loading a return

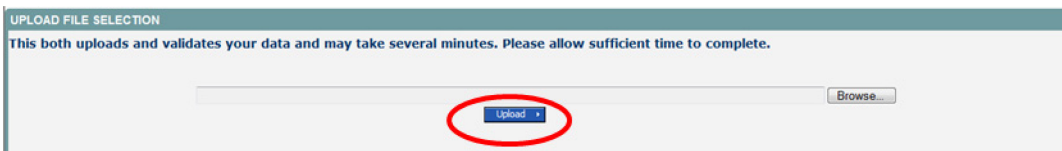
1) Click on upload return from file



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.

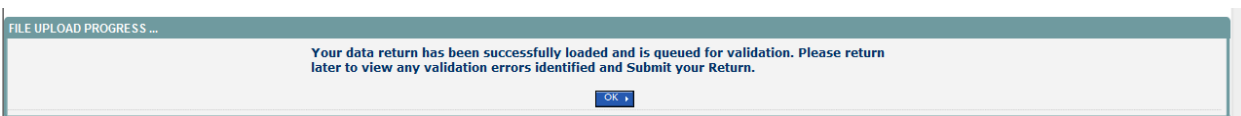


A progress message may be displayed while the upload is taking place.

Uploading School1.xml



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



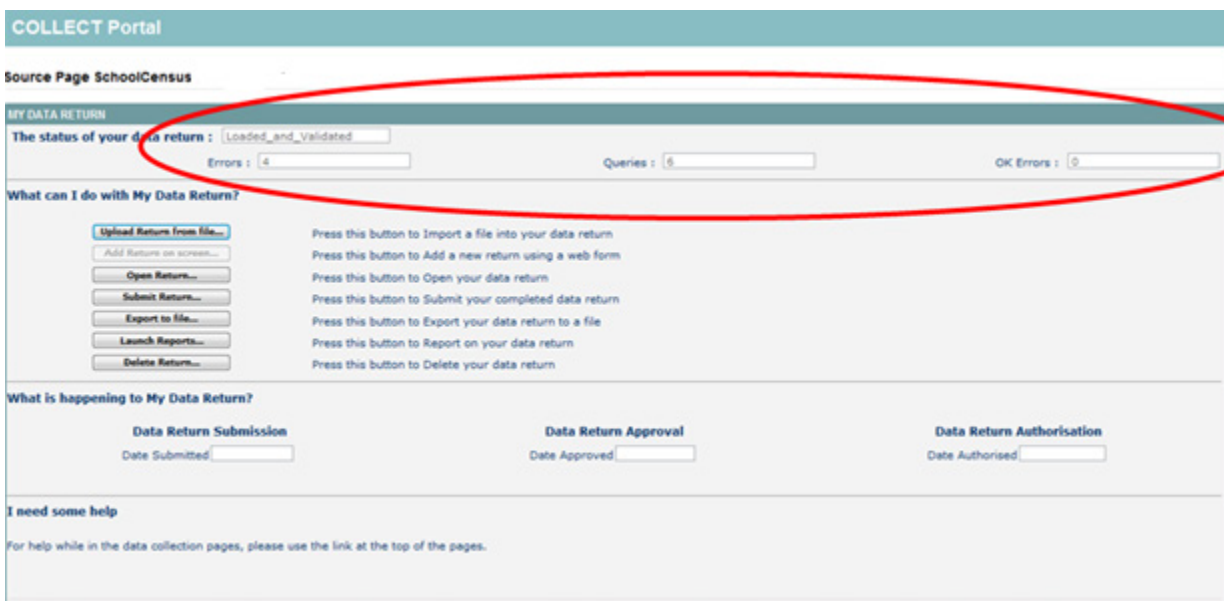
This indicates that the return has successfully loaded and is now placed in the validation queue to be validated.

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.

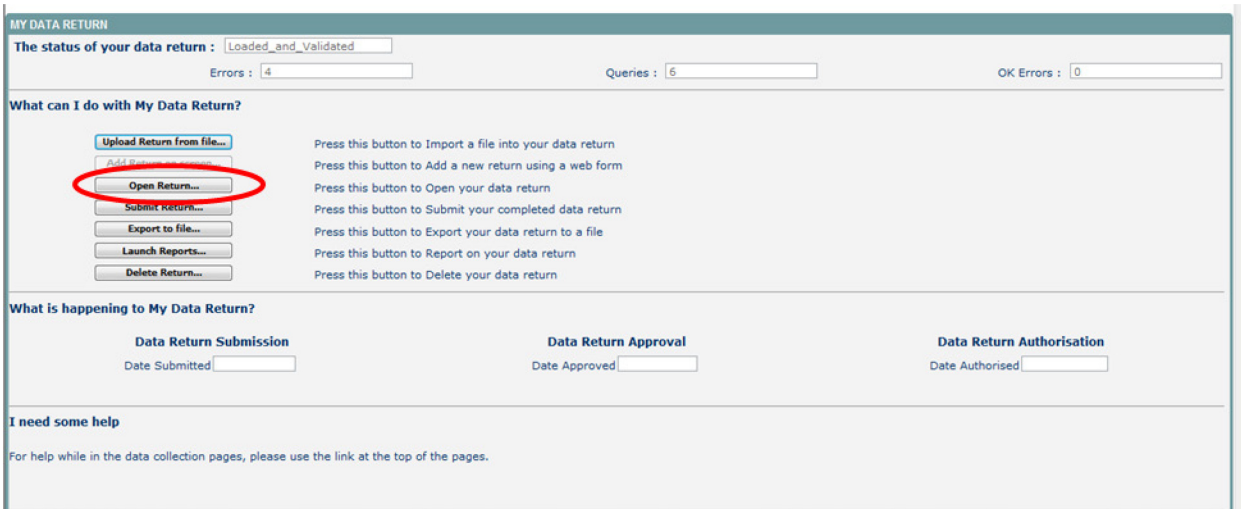
5) Once the return has been validated, you need to view the data and look at any errors or queries that have occurred

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.

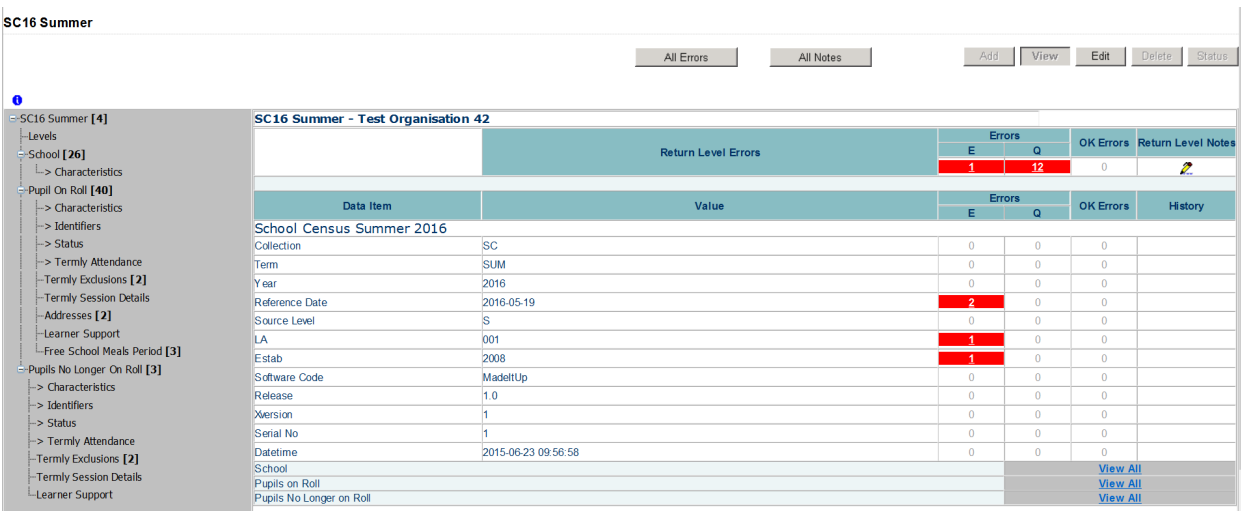


Viewing the return details

1) To view your data return click on 'open return'.



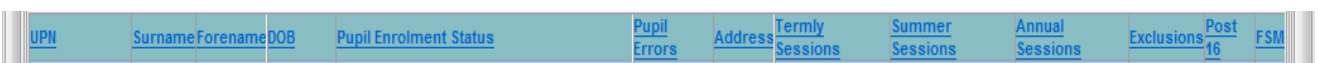
Your return will then be displayed



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

- 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

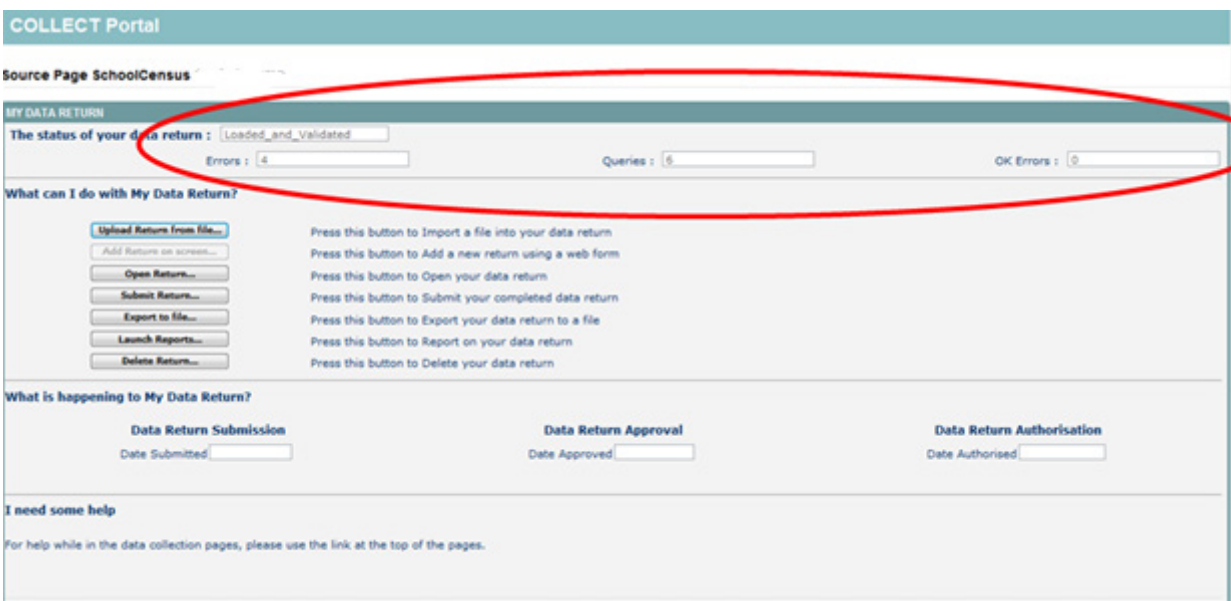
When a return has been uploaded a number of validation checks are run against the data in that return and will trigger errors or queries.

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.

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 10:17				Count 49	Return Details			
Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Field	Value			
1875		School lunch taken is missing or invalid.	Errors			Pupil Date of Birth	Jun 23 2011 12:00AM			
1886		The same Learner Support code should not appear more than once for the same pupil.	Errors			Pupil's Actual National Curriculum Year Group	2 - Year 2			
1886		The same Learner Support code should not appear more than once for the same pupil.	Errors			School Lunch Taken	null			
1763		Periods of free school meal eligibility that ended before or on the previous Census day or after the current Census day should not be included in the return.	Errors							
1763		Periods of free school meal eligibility that ended before or on the previous Census day or after the current Census day should not be included in the return.	Errors							
2303		Pupil's leaving date suggests they left the school prior to the start of their exclusion	Errors							
1573		Unique learner number must be provided for pupils aged 14 and over at date of leaving	Errors							
1573		Unique learner number must be provided for pupils aged 14 and over at date of leaving	Errors							
1870Q	Y	Please check: Percentage of pupils with sole registrations at the school is low	Queries							
2010Q	Y	Please check: 10%+ pupils' year group differing from their age	Queries							
Page 4 of 5						1 2 3 4				

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) Change the mode of the form to 'edit' and then click on the data item that needs to be changed and update it – ensuring that you reflect this change in the school's 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 you for further information.

You can add notes in the return level notepad.

- 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' data entry interface. On the left is a sidebar with a tree view containing categories like 'Levels', 'School', 'Pupil On Roll', and 'Pupils No Longer On Roll'. A pen icon is visible in the 'Return Level Notes' section of the sidebar. The main area displays a table titled 'SC16 Summer - Test Organisation 42'. The table has columns for 'Data Item', 'Value', 'Errors' (subdivided into 'E' and 'Q'), 'OK Errors', and 'History'. Several rows show error counts in red, such as 'Reference Date' with 2 errors and 'Source Level' with 1 error. At the bottom right of the table, there are three 'View All' links.

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 of the form, there is a 'Preserved Note Detail' section with a table header: 'User', 'Role', 'Organisation', 'Native ID', and 'Date and Time'. A 'Remove Preserved Note' button is located to the right of the table.

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

The screenshot shows the 'Create New Note' form. It has a header 'COLLECT Portal' and a sub-header 'Note Page'. Below the sub-header is a text input field with the placeholder text 'Type note and error number in here'. At the bottom of the form, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is circled in red.

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 screenshot shows the 'MY DATA RETURN' interface. At the top, it displays 'The status of your data return : Loaded_and_Validated'. Below this, there are fields for 'Errors : 4', 'Queries : 6', and 'OK Errors : 0'. The main section is titled 'What can I do with My Data Return?' and contains several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...', 'Export to file...', 'Launch Reports...', and 'Delete Return...'. The 'Submit Return...' button is highlighted with a red circle. Below this section, there is a 'What is happening to My Data Return?' section with three columns: 'Data Return Submission' (Date Submitted: []), 'Data Return Approval' (Date Approved: []), and 'Data Return Authorisation' (Date Authorised: []). At the bottom, there is a 'I need some help' section with a link to help pages.

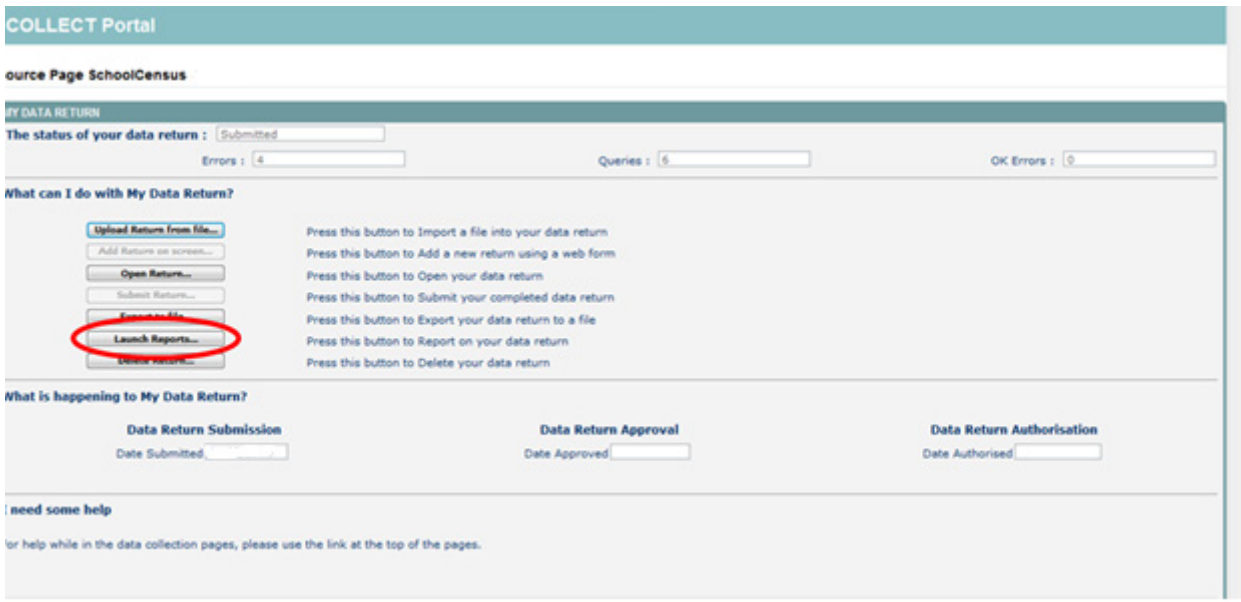
The screen will be updated

- 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

The screenshot shows the 'COLLECT Portal' interface. At the top, it displays 'Source Page SchoolCensus'. Below this, there is a 'MY DATA RETURN' section. The status of the data return is now 'Submitted', which is highlighted with a red circle. The 'Errors' field is empty, and 'Queries' is 6, and 'OK Errors' is 0. The 'What can I do with My Data Return?' section contains the same buttons as in the previous screenshot, but the 'Submit Return...' button is now disabled. Below this section, the 'What is happening to My Data Return?' section shows 'Data Return Submission' (Date Submitted: []), 'Data Return Approval' (Date Approved: []), and 'Data Return Authorisation' (Date Authorised: []). The 'Data Return Submission' button is highlighted with a red circle. At the bottom, there is a 'I need some help' section with a link to help pages.

Reports

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

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 school as each pupil is funded only once.

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

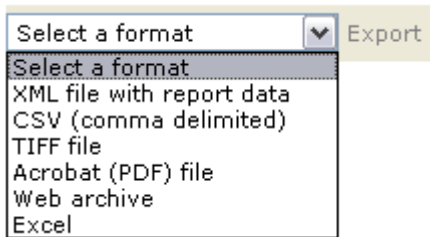
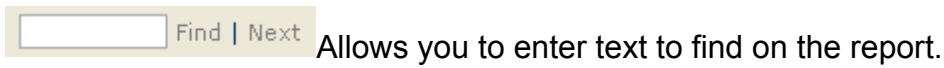
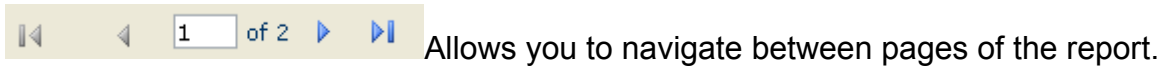
[School Census 2016](#)

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

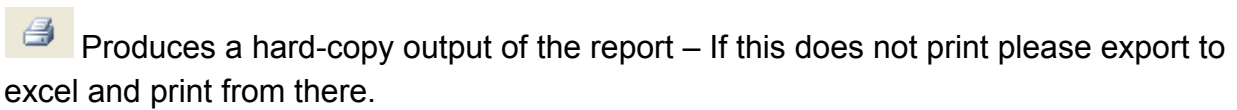
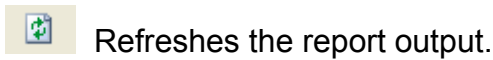
Along the top of the report you will see a toolbar with various functions.



These are explained as follows:



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.



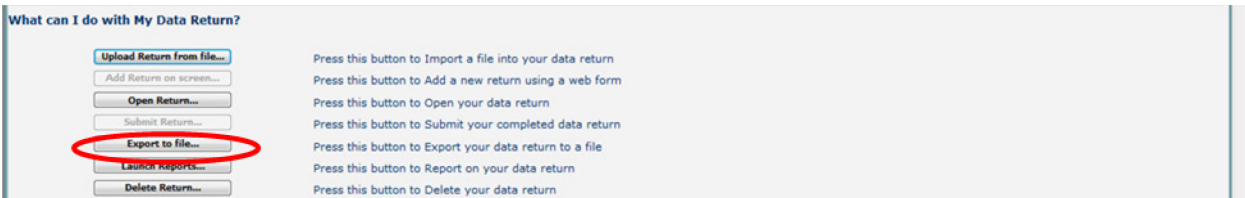
Exporting a return

A return can be exported in XML or CSV format

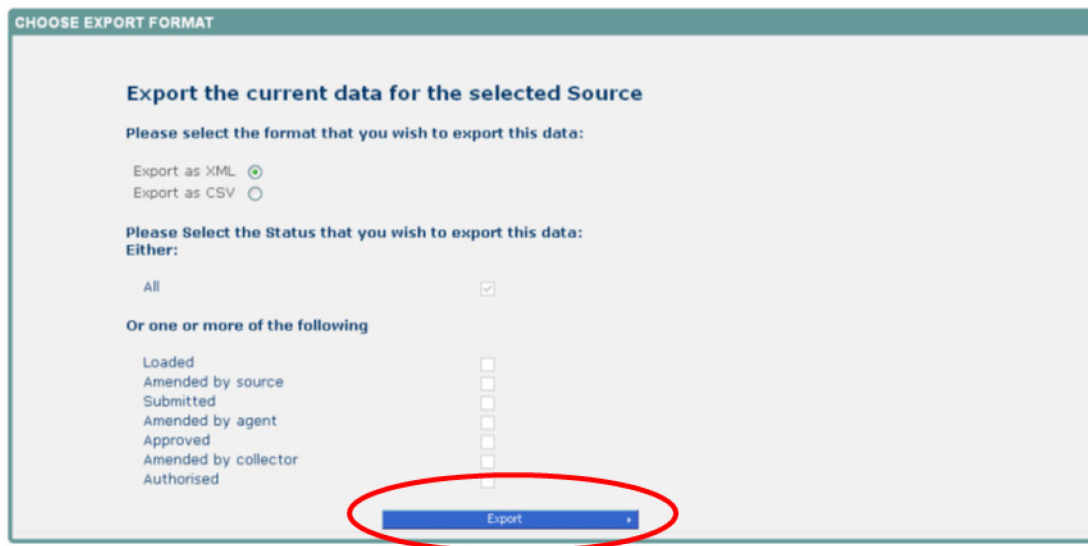
Exporting a return (current state)

On the source page

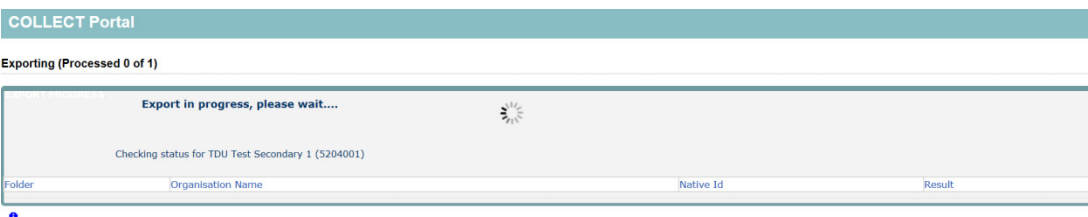
- 1) Click on export to file



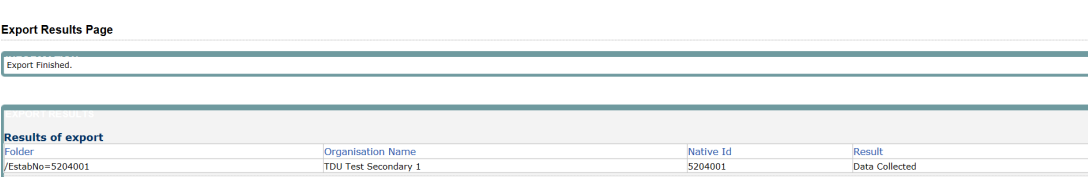
- 2) Choose to export in either XML or CSV format, then click on the export button.



- 3) A progress message will be displayed



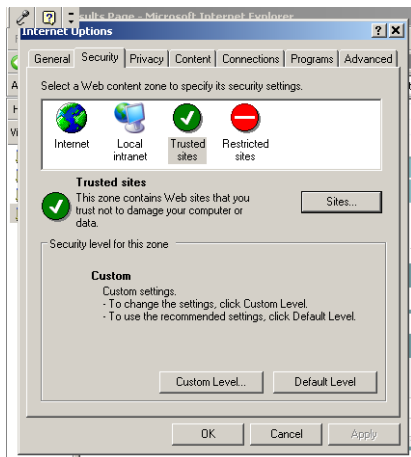
When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. We suggest saving prior to opening.



Important note: If the export process fails, with a message stating that Internet Explorer has blocked 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.



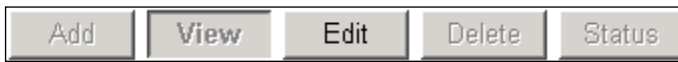
Navigation controls

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 or have a change to your contact details please could you complete a [Service Request form](#)



Department
for Education

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