School census 2015 to 2016

Editing data within COLLECT

May 2016

Contents

Editing data

The 'edit' facility in COLLECT is made available for all COLLECT users, this includes **ALL** schools regardless of type. If small amendments are required to a schools return, it is acceptable to make the amendment directly on the return within COLLECT instead of providing a resubmission. However, from an audit/inspection viewpoint **it is important that any amendments are also reflected on the school's MIS**, by doing so it will also ensure that some amendments will now be required for the same record on each termly census.

Eg local authority maintained schools should consult with their local authority regarding editing of data within COLLECT and agree local responsibilities and/or processes for amending data directly in COLLECT. Audit reports will be available to both schools and local authorities in COLLECT to provide an audit trail of any data amendments.

Please note: Not all school census fields are editable. Anything that you cannot change on COLLECT will need updating in the MIS and the file re-running.

COLLECT screen functionality

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

Do not 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 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 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, 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 accesses contract details for a workforce member	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

Filter left hand menu

Please avoid using the left hand filter menu to navigate through the return as it does not always display sections of the return in the correct format.

Accessing the return

1) Access COLLECT and the data collection in the usual way and click 'Open Return'.

Open Return...
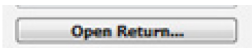
The return will then be displayed

2) Choose which section of the return you wish to edit using the 'View All' buttons.

Editing the return level screen

The first screen you see will be the return level screen.

1) To edit click on the 'Edit' button to the top of the screen:

Clicking 'Edit' changes the mode, the screen will refresh and you will now see the fields you are able to edit change to contain black text.

Overtype anything you wish to change and click on 'View' to save the change.

You will see a scroll icon has appeared in the history column – this denotes that a change has been made on the return.

BLADE UAT COLLECT Portal

SC16 Summer

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

SC16 Summer [5]
- 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 E	Errors Q	OK Errors	Return Level Notes
	1	12	0	✏

Data Item	Value	Errors E	Errors Q	OK Errors	History
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	
Xversion	1	0	0	0	
Serial No	1	0	0	0	
Datetime	2015-06-23 09:56:58 ✕	1	0	0	📄
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

Double clicking on the scroll will show the change that has been made, when and by which username

BLADE UAT COLLECT Portal

Blade All Notes Report - SchoolCensus 2016_Summer

Test Organisation 42   All Notes report on 25/04/2016 at 15:47   Return

Return and Field Level Notes   Count 0

Data Field	Return or Field Level	User	Role	Organisation	Native ID	Date and Time	
Page 1 of 1							1

Error Level Notes   Count 0

Rule No.	Field	User	Role	Organisation	Native ID	Date and Time	
Page 1 of 1							1

Preserved Notes   Count 0

User	Role	Organisation	Native ID	Date and Time	
Page 1 of 1					1

Editing the school details

1) Use the 'View All' buttons to navigate to the school section

2) You will be presented with the school details. Click on 'Edit'

3) Overtype the data or use the dropdown options to select updated data and click 'View' to save.

Editing a pupil record

1) Use the 'View All' buttons to navigate to the 'Pupil on Roll' or 'Pupil no Longer on Roll' section of the return

2) You will be presented with a list of pupils; you can use the filter bar to search for a particular child using UPN, surname or date of birth.

3) Once you have the correct pupil record shown you need to select which area of the return you wish to edit by clicking on either the headers.

Once you have navigated to the correct area of the pupil record please click 'Edit'.

4) Overtype or use drop down menus to update the information and click 'View' to save.

Popular Changes

This section shows the most frequent changes made to a return within COLLECT.

Changing a UPN

1) To make the fields in the return open for editing click on the 'Edit' button displayed in the top right hand corner of the screen

2) You will need to overtype the UPN with the updated one. Once done click 'View' to save the change

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3) You can tell that a change has been made by displaying a scroll in the history column of the return.

4) Double clicking on the scroll will show the change that has been made, when and by which username

SA Test School 1
History report on 27/08/2015 at 12:39:07
Data Unique Pupil Number(UPN)

Filter By:	Action	User	Start Date

Action	Old Value	New Value	User	Role	Organisation
Update		E001615283946		Agent	Department for Educ
Update	E001615283946			Agent	Department for Educ

Off rolling a pupil

1) Locate the pupil in the same way as above through the pupils on roll 'View All' and filter bar.

2) Once found the correct pupil click on the edit button

3) You will see a drop down box becomes available at the bottom of the screen, to transfer the pupil off roll change this to 'True'

The record will be updated overnight and will show the pupils as 'no longer on roll' the next day. As the pupil's leaving date will not be included Error 1920 will trigger, therefore the pupil no longer on roll record will need to be amended.

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Adding a missing address

1) Locate the pupil in the same way as above through the pupils on roll 'View All' and filter bar.

2) Click on the 'Pupil on roll Addresses' 'View All' Link.

3) Click 'Add' to bring up fields to enter in missing address details

4) Once all address details entered click on 'Save'

5) This will now save the address and clear any 2355Q query.

Changes to data in pupil records

You can change any information about the pupil in the same way as changing UPN. For example language, date of birth or enrolment status.

You need to locate the part of the return with the incorrect information and then click 'edit' to change it, either by overwriting or using a drop down menu of options.

Deleting a pupil from the return

Sometimes you may need to completely remove a pupil from the return if they have pulled through in error.

The most common occurrence of this is pupils no longer on roll who are aged under 4 where we do not collect any historic records eg attendance/exclusion/post16 data. These pupils will generate queries 1925 or in the case of special schools query 1926.

On checking the records if you are <u>confident</u> this is the case and the pupil needs removing please follow these steps.

1) Locate the pupil on the return please use the UPN search where possible to ensure the correct pupil is selected.

2) Double check the correct pupil is highlighted in blue and the text is in bold and click the 'Delete' button.

3) You then need to confirm this action or cancel if done in error.

Pupils No Longer On Roll - Identifiers

	Confirm deletion ?	Yes	No

Pupils No Longer On Roll - Identifiers - SA Test School 1

- SC15 Autumn [15]
  - Levels
  - School [25]
    - > Characteristics
  - Pupil On Roll [34]
    - > Annual Attendance
    - > Characteristics
    - > Identifiers
    - > Status
    - > Summer Half Term Attendance
    - > Termly Attendance
    - Termly Exclusions
    - Termly Session Details
    - Addresses [1]
    - AnnualSessionDetails [3]
    - Learning Aims [3]
    - FSMperiod [2]
    - Summer Half Term 2 Session Details
  - Pupils No Longer On Roll [4]
    - > Annual Attendance
    - > Characteristics
    - > Identifiers

Unique Pupil Number (UPN)		Pupil Surname			Pupil Date of Birth		Reset	Go
UPN	Surname	Forename	DOB	Pupil Errors	Address	Termly Sessions	Summer Sessions	Annual Sessions	Exclusions	Post 16
	Surname3a	Forename3	2003-08-31	4	0	0	0	0	0	1

Pupil No Longer On Roll Characteristics		Pupil No Longer On Roll Status		Pupil No Longer on Roll Termly Attendance		Pupil No Longer On Roll Summer Half Term 2 Attendance		Pupil No Longer On Roll Annual Attendance

Data Item	Value	Errors		OK Errors	History
		E	Q		
Pupil No Longer On Roll Identifiers					
Missing Address		0	0	0	
Unique Pupil Number(UPN)		1	0	0	
Pupil's Former UPN		0	0	0	
ULN		0	0	0	
Pupil Surname	Surname3a	0	0	0	
Pupil Forename	Forename3	0	0	0	
Pupil Middle Names		0	0	0	
Pupil Former Surname		0	0	0	
Gender of pupil	M - Male	0	0	0	
Pupil Date of Birth	2003-08-31	2	0	0	
Pupil No Longer on Roll Termly Exclusions		View All			
Pupil No Longer On Roll Post 16 Learning Aims		View All			
Pupil No Longer On Roll Addresses		View All			

Please note – Unlike an amendment to the return deleting a pupil is irreversible without a re-load of data. Please ensure you have highlighted the correct child before removing.

Removing a duplicate record

The DfE will run extra checks on your data prior to authorising such as looking at duplicate records i.e. FSM periods or Exclusions. We will contact you regarding these and ask that you update COLLECT to only show one. Using duplicate exclusions as an example please follow the following steps.

1) Locate the pupil using the 'View All' buttons and filter bar. Once the correct pupil has been highlighted, click on Pupil on Roll Termly Exclusions 'View All'

2) You will see the exclusions listed here. Please highlight the one you need to remove by clicking on it and then click the delete button.

3) You then need to confirm this action by clicking 'Yes'
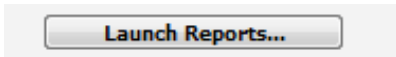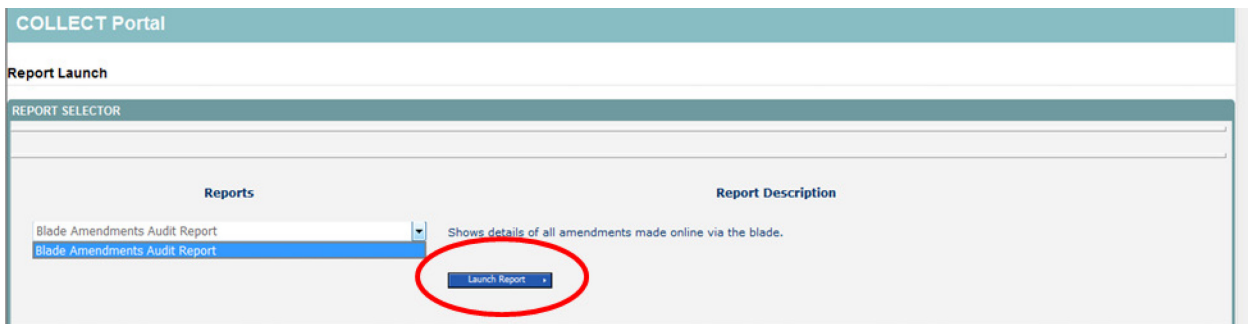
Reports

A report is available on COLLECT which will detail the change history of a school. This report is available to all schools and local authority users.

1) Click on the 'Launch Reports' button

2) Select 'Blade Amendments Report' from the drop down & click 'Launch Reports'

3) Click on 'Launch Report' again on the next page to confirm

4) Your report will be displayed detailing any change that has been made to the return.

Local authorities - You will see a full list of schools where changes have been made.

Please follow the COLLECT user guide to see how to export or print this report.

Help

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

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