



Department
for Education

School census 2016

COLLECT guide for local authorities

September 2016

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COLLECT and secure access

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

The screenshot shows the 'Secure access' login page. At the top, there is a header with the title 'Secure access'. Below it, a link for 'Forgotten username or password?' is visible. The login form includes fields for 'Username' and 'Password', followed by a checkbox for 'I agree to the terms of use' and a 'Sign in' button. A large blue banner below the login form reads 'Welcome to Secure access' and explains that the portal allows registered users access to the Department for Education's systems. To the right of the banner is a 'First time here?' link with a right arrow and a sub-link 'Visit the Secure Access Help page'. Below the banner is an 'Announcements' section with three entries: 'S2S Secure Data Transfer - Essential Maintenance' dated 07/04/2014, 'Secure Access - Scheduled Downtime' dated 28/03/2014, and 'School Access to COLLECT, s2s and KTS' dated 09/12/2013.

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:

The screenshot shows the 'Secure access' dashboard after a successful login. The user is signed in as 'from Department for Education'. The dashboard has a blue header with 'Welcome to Secure access' and a 'Need help?' link. Below the header is a section titled 'Your applications' with a list of applications. The 'COLLECT' application is highlighted with a red circle. Below the applications list, there is a note about Local Authority users using their EAS login for Key to Success. At the bottom, there are links for 'Secure access', 'Help', and 'Terms of use'.

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

The screenshot shows the 'COLLECT Portal' login page. At the top, there is a header with the Department for Education logo, the text 'You are logged in as', and a 'Log out' link. Below the header, the page is titled 'COLLECT Welcome'. The main content area contains a welcome message, an important notice for users of Internet Explorer older than version 6.0, and a section for COLLECT Exports. On the right side, there is a 'PROCEED INTO COLLECT' button with a 'Continue...' link and a 'Code of Conduct' link.

Department for Education You are logged in as 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.

The screenshot shows the 'MY DATA COLLECTIONS' table. The table has columns for Data Collection, User Role, Organisation, Status, Due Date, and Days Due. The first row, 'SchoolCensus 2014_Summer', is highlighted. Below the table, there is a 'Page 7 of 8' indicator and a 'Select Data Collection' button.

Data Collection	User Role	Organisation	Status	Due Date	Days Due
SchoolCensus 2014_Summer	Collector	Department for Education	Testing	15/05/2014 00:00:00	-830
SchoolCensus 2015_Autumn	Agent	Department for Education	Testing	01/10/2015 00:00:00	-326
SchoolCensus 2015_Autumn	Collector	Department for Education	Testing	01/10/2015 00:00:00	-326
SchoolCensus 2015_Autumn	Administrator	Department for Education	Testing/Live	01/10/2015 00:00:00	-326
SchoolCensus 2016_Autumn	Collector	Department for Education	Testing	06/10/2016 00:00:00	45
SchoolCensus 2016_Autumn	Administrator	Department for Education	Testing/Live	06/10/2016 00:00:00	45
SchoolCensus 2016_Spring	Agent	Department for Education	Testing	21/01/2016 00:00:00	-214
SchoolCensus 2016_Spring	Collector	Department for Education	Testing	21/01/2016 00:00:00	-214
SchoolCensus 2016_Spring	Administrator	Department for Education	Testing/Live	21/01/2016 00:00:00	-214
SchoolCensus 2016_Summer	Administrator	Department for Education	Open/Live	19/05/2016 00:00:00	-95

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Select Data Collection

Agent page

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

The screenshot shows the 'Agent page' 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 with columns: Expected, Outstanding, Submitted, Approved, Authorised, and Errors (E, Q, OK). The data shows 41 Expected, 40 Outstanding, 0 Submitted, 1 Approved, 0 Authorised, 58 Errors (E), 25 Errors (Q), and 0 Errors (OK). Below the performance summary is a 'Sources' table with columns: Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The table lists 17 sources, all with 'No_Data' for Status and '0' for Errors, Queries, and OK Errors. At the bottom, there is a 'Page 1 of 5' indicator and a '2 3 4 5' pagination control. Below the table is a section with various buttons: Open Return..., Approve..., Approve All..., Unapprove..., Reject..., Delete..., Export Selected..., Export Multiple..., Export All..., Upload Return for selected Source..., Upload Multiple Returns (zip file)..., Add Return on screen..., Agent Administration..., Academy Export..., Validate Selected Return..., Validate All Non-validated Returns..., Launch Reports..., Queue Management..., Change Queue..., and Move to this queue -->.

The agent screen comprises four main sections:

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

Filter by

The screenshot shows the 'Filter by' section of the Agent page. It has a 'Filter By:' label and five input fields: Name, Native ID, Status, Org Group, and Queue. Each field has a dropdown arrow. There are 'Go' and 'Reset' buttons at the end of the row.

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 queue 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;
9. The total number of school returns authorised by the department for education;
10. 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 for example 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

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

Agent functions

The toolbar includes buttons for: Open Return..., Approve..., Approve All..., Unapprove..., Reject..., Delete..., Export Selected..., Export Multiple..., Export All..., Upload Return for selected Source..., Upload Multiple Returns (zip file)..., Add Return on screen..., Agent Administration..., Academy Export..., Validate Selected Return..., Validate All Non-validated Returns..., Launch Reports..., Queue Management..., Change Queue..., and Move to this queue -> Academies.

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

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

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

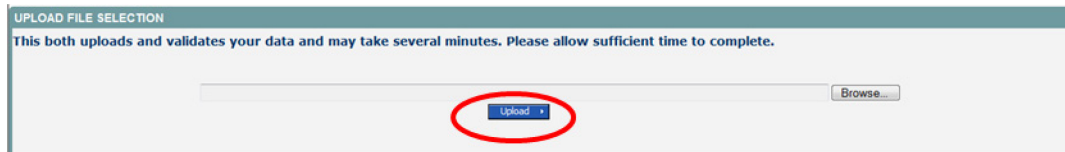
UPLOAD FILE SELECTION

This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.

Upload

Browse

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

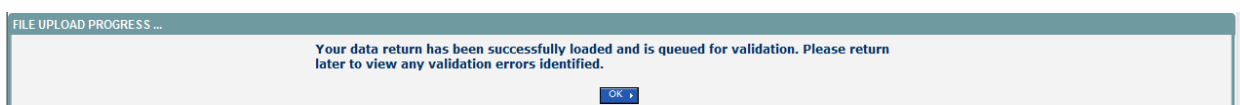


A progress message may be displayed while the upload is taking place.

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 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

Please note when a 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'.

When 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

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
5204001	TDU Test Secondary 1	Submitted	21/12/2015				58	24	0	
5201028	SA Test NA Region School	No_Data					0	0	0	0
5201001	SA Test School 1	No_Data					0	0	0	0
5201010	SA Test School 10	No_Data					0	0	0	0
5201011	SA Test School 11	No_Data					0	0	0	0
5201012	SA Test School 12	No_Data					0	0	0	0
5201013	SA Test School 13	No_Data					0	0	0	0
5201014	SA Test School 14	No_Data					0	0	0	0
5201015	SA Test School 15	No_Data					0	0	0	0
5201016	SA Test School 16	No_Data					0	0	0	0

Page 1 of 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.

Filter By: Name Native ID Status Org Group Queue

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

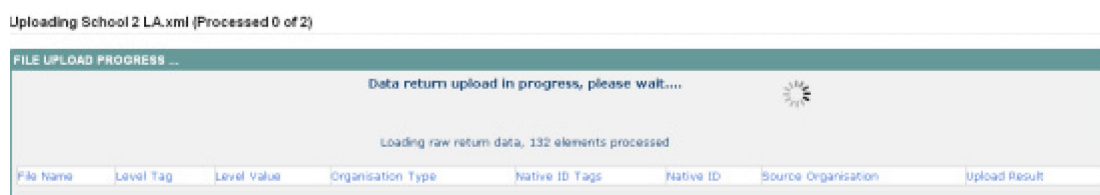
Page 4 of 5

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

UPLOAD FILE SELECTION

This both uploads and validates your data and may take several minutes. Please allow sufficient time to complete.

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.



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.

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

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	25	0	
5207008	TDU Test Special 1	No_Data					0	0	0	

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' you will be taken into the pupil section. This displays the 'records list', with all 'pupils on roll' visible. You can use the filter bar to identify a particular pupil, or click on the headers to sort alphabetically.

UPN	SurnameForename	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.

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
5202000	TDU Test Primary 1	No_Data				0	0
5202018	TDU Test Primary 2	No_Data				0	0
5201100	TDU Test PRU 1	No_Data				0	0
5204077	TDU Test Secondary 2	No_Data				0	0
5206924	TDU Test CTC 1	No_Data				0	0
5206001	TDU Test Independent 2	No_Data				0	0
5201046	TDU Test Nursery School 2	No_Data				0	0
5201101	TDU Test PRU 2	No_Data				0	0
5204001	TDU Test Secondary 1	Approved	21/12/2015	30/12/2015		58	25
5207008	TDU Test Special 1	No_Data				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		Pupil Surname	NULL	
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 6			

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

Where validation queries are raised in COLLECT, an explanation will be required for these queries in the return level notes field within COLLECT. The department will require **sufficient detail** in these explanations to allow the queries to be accepted, and returns authorised.

A guide detailing what is regarded as an acceptable notepad entry for queries on the census is available on the [school census website](#).

The department will contact the local authority for further information if the notepad entry is blank or insufficient.

You can add notes in “return level” notes query.

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

SC16 Autumn - SA Test School 1

All notes must be added in the "Return Level Notes" section

Return Level Errors		Errors		OK Errors	Return Level Notes
E	Q	E	Q		
0	14	0	0	0	

Data Item	Value	Errors		OK Errors	History
		E	Q		
School Census Autumn 2016					
Collection	SC	0	0	0	
Term	AUT	0	0	0	
Year	2016	0	0	0	
Reference Date	2016-10-06	2	0	0	
Source Level	L	0	0	0	
LA	520	1	0	0	
Etab	1001	1	0	0	
Software Code	MadeUp	0	0	0	
Release		0	0	0	
Xversion		0	0	0	
Serial No	1	0	0	0	
Datetime	2016-01-01 00:00:00	0	0	0	
School					View All
Pupils on Roll					View All
Pupils No Longer on Roll					View All

- 2) Click add new note

Note Detail

Preserved notes deleted by resubmissions

User	Role	Organisation	Native ID	Date and Time
------	------	--------------	-----------	---------------

Preserved Note Detail

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

The screenshot shows the 'COLLECT Portal' interface. Under the 'Note Page' section, there is a 'Create New Note' form. The form contains a text area 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 schools return.

You can enter one note to cover numerous queries.

For example – 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 have 'submitted'. 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.

The screenshot shows the 'agent main screen' with a 'Performance summary' table and a 'Sources' table. The 'Approve' button is highlighted in the bottom navigation bar.

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
41	40	1	0	0	58	24	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	24	0
5207008	TDU Test Special 1	No_Data					0	0	0

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1 2 3 5

Open Return... Approve... Approve All... Unapprove... Reject... Delete... Export Selected... Export Multiple... Export All...

Upload Return for selected Source... Upload Multiple Returns (zip file)...

Validate Selected Return... Validate All Non-validated Returns...

Launch Reports... Queue Management... Change Queue... Move to this queue -->

Agent Administration... Academy Export...

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

The screen information will be updated:

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	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

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... Move to this queue --> Academies

- 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 do not try and work on the same file.

- 1) From the agent page click the queue management button.

Validate Selected Return... Validate All Non-validated Returns...

Launch Reports... Queue Management... Change Queue... Move to this queue --> Academies

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

2) To add a name, click the add button.

Work Flow Queues Management

Registered Queues

Collection ID: 679

Queue Name:

Default Queue: ☐

Add **Update** **Remove**

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3) 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

Registered Queues

Collection ID: 626

Queue Name: User1

Default Queue: ☐

Add **Update** **Remove**

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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.

Note: 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'.

Validate Selected Return... Validate All Non-validated Returns...

Launch Reports... **Queue Management...** **Change Queue...** **Move to this queue -->** Academies

- 4) 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).

COLLECT Portal

Queue Management

Queue
User1

Queue Members
SA Test School 1

Queue Non-Members
SA Test NA Region School
SA Test School 10
SA Test School 11
SA Test School 12
SA Test School 13
SA Test School 14
SA Test School 15
SA Test School 16
SA Test School 17
SA Test School 18
SA Test School 19
SA Test School 2
SA Test School 20
SA Test School 21
SA Test School 22
SA Test School 23
SA Test School 24
SA Test School 25
SA Test School 26
SA Test School 3

>> > << <

- 5) 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).

COLLECT Portal

Queue Management

Queue
User1

Queue Members

Queue Non-Members
SA Test NA Region School
SA Test School 10
SA Test School 11
SA Test School 12
SA Test School 13
SA Test School 14
SA Test School 15
SA Test School 16
SA Test School 17
SA Test School 18
SA Test School 19
SA Test School 2
SA Test School 20
SA Test School 21
SA Test School 22
SA Test School 23
SA Test School 24
SA Test School 25
SA Test School 26
SA Test School 3

>> > << <

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.

Validate Selected Return... Validate All Non-validated Returns... Launch Reports... Queue Management... Change Queue... Move to this queue --> Academies

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 Reports 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 with columns for Expected, Outstanding, Submitted, Approved, Authorised, and Errors (E, Q, OK). The data shows 41 Expected, 40 Outstanding, 0 Submitted, 1 Approved, 0 Authorised, 58 Errors (E), 24 Errors (Q), and 0 Errors (OK). Below the performance summary is a 'Sources' table with columns for Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The table lists various sources, including TDU Test Primary 1, TDU Test Primary 2, TDU Test PRU 1, TDU Test Secondary 2, TDU Test CTC 1, TDU Test Independent 2, TDU Test Nursery School 2, TDU Test PRU 2, TDU Test Secondary 1 (highlighted), and TDU Test Special 1. The 'Status' column shows 'No_Data' for most sources and 'Approved' for TDU Test Secondary 1. The 'SubmittedDate' and 'ApprovedDate' are 21/12/2015 and 30/12/2015 respectively for the highlighted source. The 'Queue' column shows 58 for the highlighted source. The 'Errors' column shows 24 for the highlighted source. The 'Queries' column shows 0 for the highlighted source. The 'OK Errors' column shows 0 for the highlighted source. Below the sources table is a 'Page 4 of 5' indicator and a toolbar with buttons for Open Return..., Approve..., Approve All..., Unapprove..., Reject..., Delete..., Export Selected..., Export Multiple..., Export All..., Upload Return for selected Source..., Upload Multiple Returns (zip file)..., 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 displayed 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 with the incorrect enrolment status combination 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 website](#)

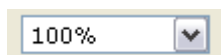
3) Select the report you wish to run and click launch report.

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

The screenshot shows a report toolbar with various functions. It includes a 'Find' button, a 'Next' button, a 'Select a format' dropdown menu, an 'Export' button, and a 'Print' button. The toolbar also displays '1 of 2' and '100%'.

These are explained as follows:

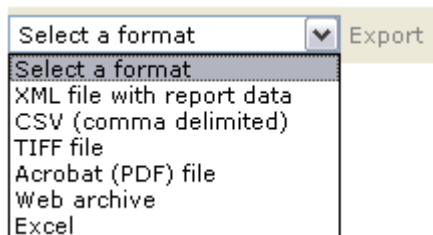
The screenshot shows a report navigation toolbar with buttons for 'Previous', '1 of 2', 'Next', and 'End'. Below the toolbar, the text 'Allows you to navigate between pages of the report.' is displayed.



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 provide 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.

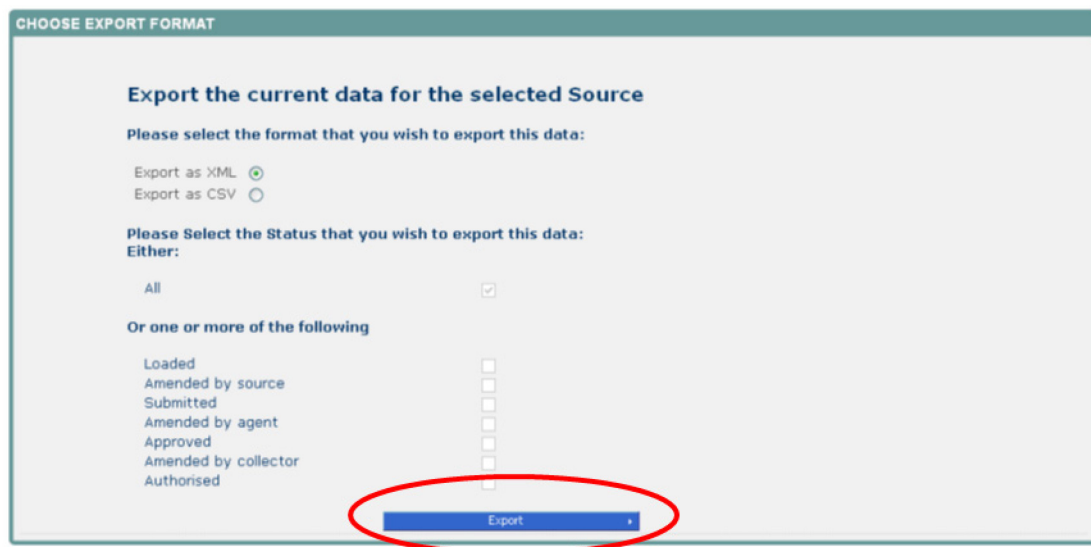
- 1) Click on academy export



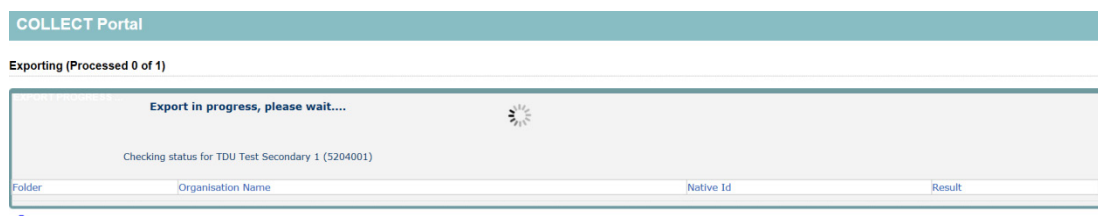
Selecting format

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.



- 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.

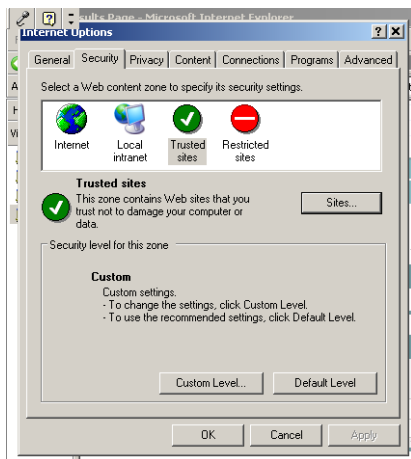


Important note: if the export process fails, with a message stating that internet explorer has blocked download of a file, you might succeed if you try again.

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';

Then 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 then ok again. 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

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.



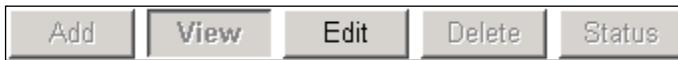
Navigation controls

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

These 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

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