



Department  
for Education

# **Key stage 1 data collection return 2016**

**Instructions for local authorities on how  
to use COLLECT to submit their return  
for 2016**

**June 2016**

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COLLECT issues and data collection queries

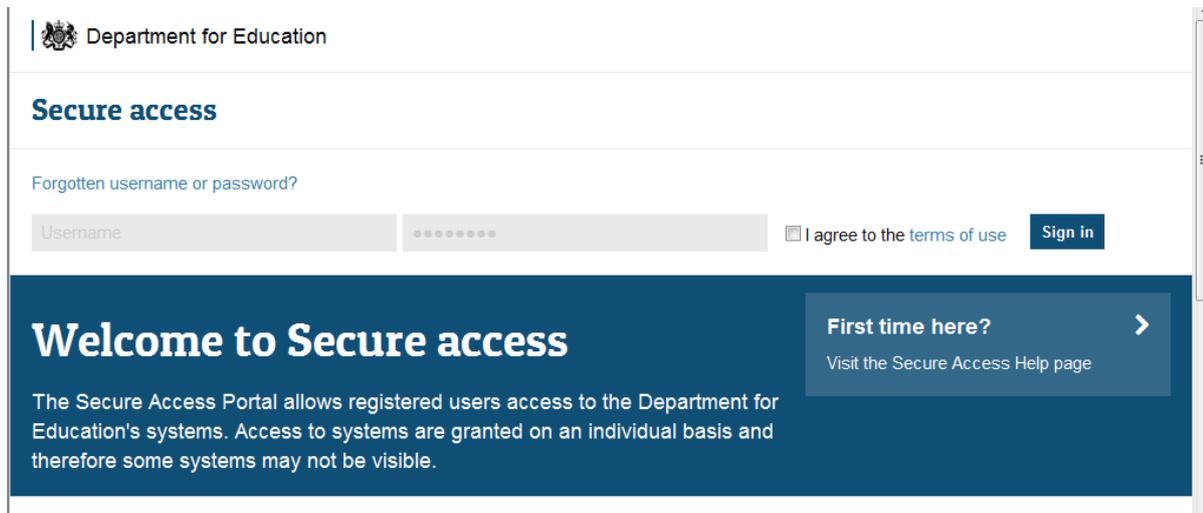
27

Secure Access issues

27

# COLLECT and Secure Access

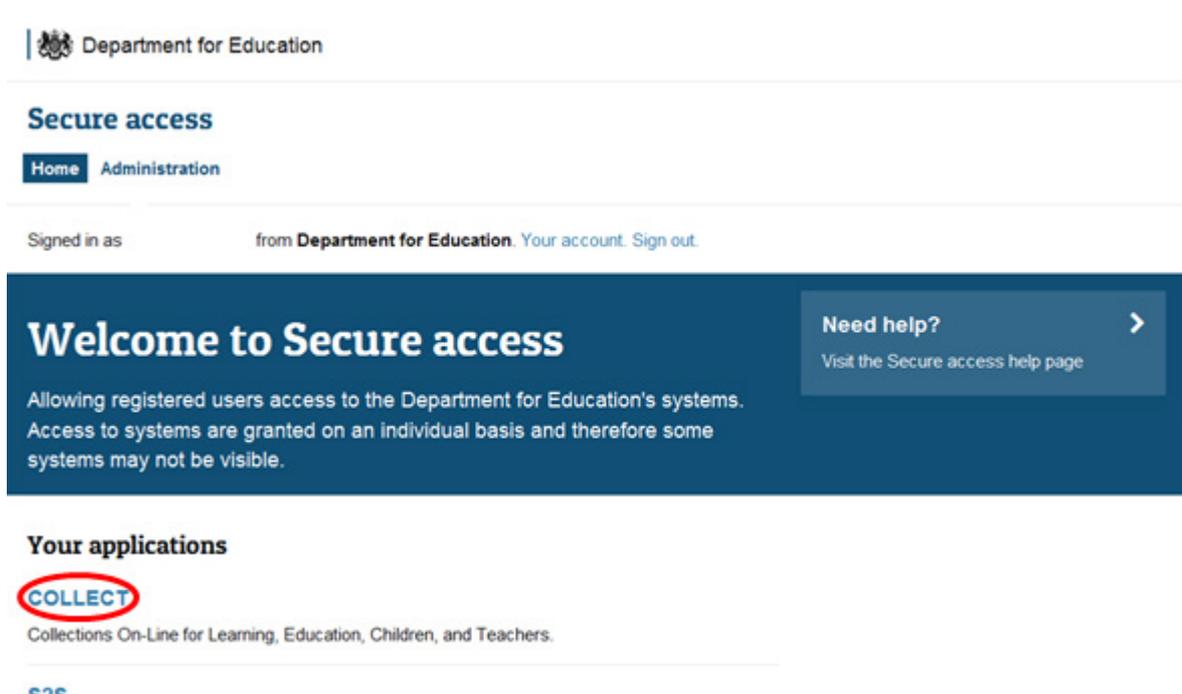
Please note that some images may refer to 2015 however remain the same for 2016.



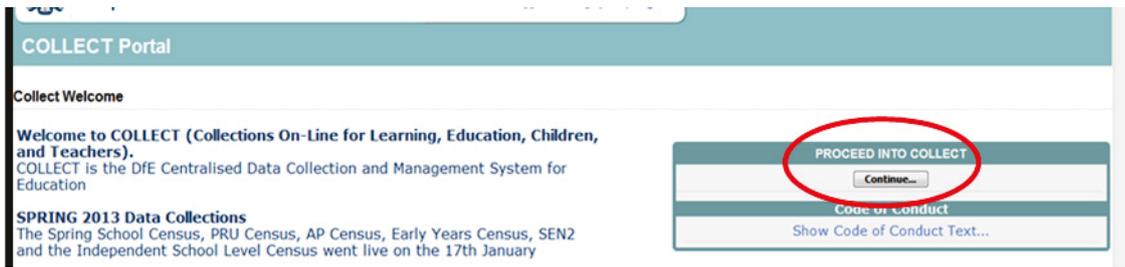
Access to COLLECT (Collections On-line for Learning, Education, Children, and Teachers) is now through the Department's [Secure Access system](#) (SA).

To access Secure Access existing users will need their COLLECT username and password.

If you are a new user and require access or have forgotten your username and password to COLLECT, you will need to speak to your Approver. Full Secure Access guidance is published on the [Secure Access website](#).

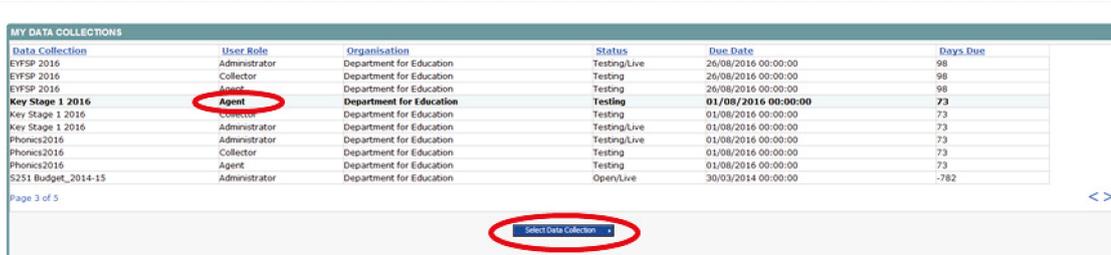


Once successfully logged in, click on the COLLECT link to access COLLECT, as above.

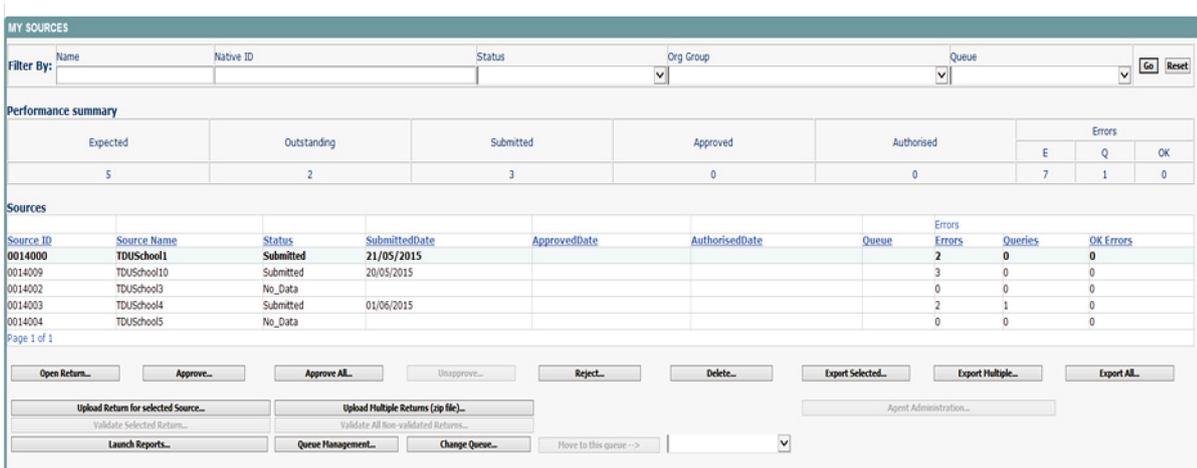


Click on 'continue', as above.

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



The agent screen comprises four main sections:

- 'Filter by'
- 'Performance Summary'
- 'Sources'

- 'Agent Functions'

## Filter by

MY SOURCES				
Name	Native ID	Status	Org Group	Queue
Filter By:				
<input type="text"/>				
Go Reset				

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 only the school with that establishment will appear on the screen. This saves the user having to go through numerous screens to get to the particular school return they want to work on.

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

## Performance summary

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

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

It shows:

- The total number of schools that a return is expected from;
- The total number of schools who have yet to submit their return;
- The total number of schools who have submitted their return;
- The total number of school returns approved by the local authority;
- The total number of school returns authorised by the Department for Education (DfE);
- 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

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014004	TDUSchool5	No_Data					0	0	0

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

## Agent functions

The screenshot shows a toolbar with the following buttons and options:

- Open Returns...
- Approve...
- Approve All...
- Disapprove...
- Reject...
- Delete...
- Export Selected...
- Export Multiple...
- Export All...
- Upload Return for selected Source...
- Upload Multiple Returns (zip file)...
- Agent Administration...
- Validate Selected Returns...
- Validate All Non-validated Returns...
- Launch Reports...
- Queue Management...
- Change Queue...
- 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.

## Uploading single XML files

As you are loading your data on behalf of your schools, please follow the instructions below.

The school file must be suffixed with .xml but can be named anything. Usually this can be extracted from the management information system (MIS) or for some collections a spreadsheet or XML convertor is provided by the DfE.

You may upload your schools files in two ways: individually or multiply in a zipped file.

## Individual upload of XML files

First, highlight the school in the list of schools on the main agent screen. Then click on the 'upload return for selected source...' button in the return management section.

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014004	TDUSchool5	No_Data					0	0	0

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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 All Non-validated Returns... Agent Administration...

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

## Uploading multiple XMLs (in a zipped file)

Local authorities have the option to upload multiple returns in one zipped file. Each return within the .zip file should be a separate .xml file.

From the main screen below, select the 'upload multiple returns (zip file)' button. The next screen is the same as uploading a single return. Select the appropriate zipped file from the browser then select the 'upload multiple returns (zip file)...' button. All the files will be uploaded and their status set to submitted.

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014004	TDUSchool5	No_Data					0	0	0

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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... Agent Administration...

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

The upload screen will be displayed:

**ZIP FILE SELECTION**

Click on the Browse button below to locate your zip file containing the return files to upload then click on the Upload button to begin the process. You will be taken to a results page on completion to view the upload result for each file contained in the zip file.

Please note that re-submitting existing Data Returns will delete all notes other than return-level notes. If you wish to preserve any data-item or validation error level notes you must enter them as return-level notes before re-submitting the Data Returns.

Use the browse button to locate the file you wish to upload. Highlight the file name and click on 'open' to select it. Then click on the 'upload' button to load the file.

**ZIP FILE SELECTION**

Click on the Browse button below to locate your zip file containing the return files to upload then click on the Upload button to begin the process. You will be taken to a results page on completion to view the upload result for each file contained in the zip file.

Please note that re-submitting existing Data Returns will delete all notes other than return-level notes. If you wish to preserve any data-item or validation error level notes you must enter them as return-level notes before re-submitting the Data Returns.

f:\\_Desktop\PhonicsTestFile\_001\_Pass.xml

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

**FILE UPLOAD PROGRESS ...**

Data return upload in progress, please wait....

Deleting existing data return

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Once the upload has completed, the source main page will be re-displayed and the return status section will updated to 'submitted' for the school(s) you have loaded. The total number of 'outstanding' and 'submitted' returns for your local authority will also be updated.

**MY SOURCES**

Filter By: Name Native ID Status Org Group Queue

**Performance summary**

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
5	2	3	0	0	7	1	0

**Sources**

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014004	TDUSchool5	No_Data					0	0	0

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Move to this queue ->

Please note there are more highlighted buttons available after a return has been loaded.

The return status will change depending on whether the school or local authority has loaded or edited the return:

- 'No Data' – the return has not been loaded into the system.
- 'Import in Progress' – a return is currently being loaded for the source.
- 'Waiting for Validation' – the return is currently in a queue and is waiting to be validated by COLLECT.
- 'Validation in Progress' – the system is currently running validation checks against your return. The system will usually run validation checks on loading of the return or after data within the return has been changed.
- 'Submitted' – the return has been submitted by the source.
- 'Rejected by Agent' – the return has been rejected by the local authority. A return is only rejected if there is a fundamental issue with it, for example a data return for the wrong year has been loaded.
- 'Amended by Agent' – the return has been submitted by the source and it has been amended online by the agent (local authority). A local authority should only amend data submitted by the source after seeking permission from the source to do so.
- 'Approved' – the return has been approved by the local authority after all data checks have been carried out and they are happy for the DfE to take that version as final (changes can still be made).
- 'Amended by Collector' – the return has been approved by the agent, and then it has been amended online by the collector (DfE). The DfE will only amend data approved by the agent, after agreeing changes with the agent or to un-authorise a return if needed.
- 'Rejected by Collector' – the return has been rejected by the collector (DfE).
- 'Authorised' – the return has been checked and authorised by the collector (DfE).

# Viewing returns

Once you have loaded the returns you will need to go into the schools to check the data is correct and also to ensure notes have been entered against any queries or errors that cannot be corrected.

To view returns, select the school you want by clicking on its name (you can search for a school using the filter by tool bar) and click on open return.

The screenshot shows a web application interface for managing returns. At the top, there is a 'MY SOURCES' section with a 'Filter By:' bar containing fields for Name, Source ID, Status, Org Group, and Queue, 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 'Sources' table below lists individual sources with columns for Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The row for '0014003 TDUSchool4' is highlighted. At the bottom, there is a toolbar with buttons for 'Open Return...', 'Approve...', 'Approve All...', 'Unapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. There are also buttons for 'Upload Return for selected Source...', 'Upload Multiple Returns (zip file)...', 'Validate Selected Returns...', 'Validate All Non-validated Returns...', 'Launch Reports...', 'Queue Management...', and 'Change Queue...'. A 'Page 1 of 1' indicator is visible.

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
5	2	3	0	0	E	Q	OK
					7	1	0

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014005	TDUSchool5	No_Data					0	0	0

## Navigating through the screens

This screen shows the header information from the XML file. It also allows you to view the errors and queries associated with that return and the notes associated with that return. Please note any errors or queries showing on the header screen will only relate to the data on that screen and not the whole return.

You can use view all buttons in order to navigate through the return or the grey menu on the left hand side.

LA KS1

Approve All Errors All Notes Add View Edit Delete Status

LA KS1 [2]  
- Pupil  
  -> PupilOverview  
  - Assessment

LA KS1 - TDUSchool4

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)

		Errors	Queries	OK	Return Level Notes
		0	1	0	0

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
Document Name	Key Stage 1 Transfer File	0	0	0		
Document Creation DateTime	2015-06-22 02:59:58	0	0	0		
Year	2015	0	0	0		
LA	001	0	0	0		
Software Code	CCS - One	0	0	0		
Establishment Number	4003	0	0	0		
Number of Pupils In Error	0	0	0	0		
Pupils						
Pupil Overview						

View All

## Viewing the query and errors screen

You will need to try and correct any errors on your return and enter notes against queries.

To view errors and queries on the return please select the all errors button and a screen will be displayed containing a list of all the errors on that return. Please see below.

The screenshot shows the 'LA KS1' interface. At the top, there are buttons for 'Approve', 'All Errors' (circled in red), and 'All Notes'. Below this is a table titled 'LA KS1 - TDUSchool4' with a sub-header 'RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)'. The table has columns for 'Errors', 'Queries', 'OK', and 'Return Level Notes'. The 'Queries' column has a red background with the number '1'. Below this is a table with columns for 'Data Item', 'Value', 'Errors', 'Queries', 'OK', 'Notes', and 'History'. The 'Data Item' column lists various fields like 'Document Name', 'Document Creation DateTime', 'Year', 'LA', 'Software Code', 'Establishment Number', and 'Number of Pupils in Error'. The 'Value' column shows the corresponding values for each field. The 'Errors' column has a red background with the number '2' for the 'LA' field. The 'Queries' column has a red background with the number '1' for the 'Software Code' field. The 'OK' column has a red background with the number '0' for the 'LA' field. The 'Notes' column has a red background with the number '0' for the 'LA' field. The 'History' column has a red background with the number '0' for the 'LA' field. There are also 'View All' and 'View' buttons at the bottom right of the table.

Clicking on the details button will display the data item that is in error.

The screenshot shows the 'Blade Error Report - Key Stage 1 2015' interface. The title is 'Blade Error Report - Key Stage 1 2015'. Below this is a sub-header 'TDUSchool4' and 'Error report on 01/06/2015 at 13:35'. The table has columns for 'Error No.', 'Return Level', 'Error Message', 'Priority', 'Count', 'Field', and 'Details'. The 'Error No.' column has values '301' and '117'. The 'Return Level' column has values 'Y' and 'Y'. The 'Error Message' column has values 'Invalid Code Value' and 'Number of girls loaded is more than 10 less than expected number (No. of Girls loaded = 0, Expected No. of Girls = 11)'. The 'Priority' column has values 'Errors' and 'Queries'. The 'Count' column has values '1' and '1'. The 'Field' column has values 'LEA' and 'LEA'. The 'Details' column has a red background with the number '1' for the 'Invalid Code Value' error. The 'Details' button is circled in red.

## Adding notes

You can add your own notes to a query or error that cannot be resolved before submitting the data to the DfE if not already done by the school. Notes can be added to a return from within the all errors screen.

File No.	Return Level	Error Message	Priority	QC/I	Count	Field	Return Details
301		Invalid Code Value	Errors	Details	3	Value	001
		Local Authority number missing or invalid	Errors	Details			
117	Y	Number of girls loaded is more than 10 less than expected number (No. of Girls loaded = 0, Expected No. of Girls = 11)	Queries	Details			

As you can see from the above there is a pencil icon at the end of each row. To add a note relating to each query please click on the pencil. You will then be presented with the screen below:

User	Role	Organisation	Native ID	Date and Time

Note Detail

Add New Note Remove Note

You need to click on add new note for you to be able to type in the notes box. To go back to the previous screen please select the back button.

### Note Page

Create New Note

Type note in here

Create Cancel

Once you've typed in your explanation please click on create note. This will then save that note against the return.

You can tell if a note has been put beside a query as the pencil icon will change to a notepad, see below:

File No.	Return Level	Error Message	Priority	QC/I	Count	Field	Return Details
301		Invalid Code Value	Errors	Details	3	Value	001
		Local Authority number missing or invalid	Errors	Details			
117	Y	Number of girls loaded is more than 10 less than expected number (No. of Girls loaded = 0, Expected No. of Girls = 11)	Queries	Details			

To view those notes just click on the notepad.

Please note even though you have entered an explanatory note against the errors and queries they will not disappear from COLLECT until they have been reviewed by the DfE.

To get back to the previous screen please select the return button.

## Editing a return

First highlight the school where you wish to edit data in the list of schools on the main agent screen. Then click on the open return button in the return management section.

The screenshot shows the 'MY SOURCES' interface. At the top, there are filter fields for Name, Native ID, Status, Org Group, and Queue. Below this is a 'Performance summary' table with columns: Expected (5), Outstanding (2), Submitted (3), Approved (0), Authorised (0), and Errors (E: 7, Q: 1, OK: 0). The main 'Sources' table lists several entries, with the first row (Source ID 0014000, Name TDUSchool1, Status Submitted, SubmittedDate 21/05/2015) circled in red. Below the table is a row of management buttons: 'Open Return...', 'Approve...', 'Approve All...', 'Disapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. The 'Open Return...' button is circled in red.

This will bring up all the same screens as described in the school section.

Once a return has been uploaded, a local authority may go in and edit the data if necessary. The recommended approach is that if there are errors on the data when it is uploaded into COLLECT that the corrections should be made in the school management information system and a new output file generated and uploaded into COLLECT. This will ensure that the data in the management information system is kept in line with the data being provided in the data collection return to the DfE, however there may be circumstances when it is necessary for data to be edited rather than a new file uploaded.

The first screen that can be edited is the source school screen. When you first enter the screen it will be in view mode. To go into edit mode select the edit button at the top of the screen. All the fields can be updated. You'll need to click elsewhere on the screen for the field to update. If this results in error corrections then the errors will disappear.

To save any changes made, select the view button.

The screenshot shows the 'LA KS1 - TDUSchool4' source school screen. At the top, there are buttons for 'Approve', 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Cancel', and 'Submit'. The 'Edit' button is circled in red. Below this is a table showing 'RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)' with columns: Errors (0), Queries (1), OK (0), and Returns Level Notes (1). Below that is a table with columns: Data Items, Value, Errors, Queries, OK, Notes, and History. The 'Edit' button is circled in red.

## Approving a return

Once you have checked the schools and ensured you have added relevant notes to queries, please approve all your returns, by pressing the approve all button you are submitting the data to the DfE. The DfE can see the data as soon as it's loaded but cannot access it until you have approved it.

Users should highlight the return for approval and press the approve button. See below.

The screenshot displays the 'MY SOURCES' interface. At the top, there are filter fields for Name, Native ID, Status, Org Group, and Queue, with 'Go' and 'Reset' buttons. Below this is a 'Performance summary' table:

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
5	2	3	0	0	7	1	0

Below the summary is a 'Sources' table:

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014004	TDUSchool5	No_Data					0	0	0

At the bottom, there is a row of action buttons: 'Open Returns...', 'Approve...', 'Approve All...', 'Disapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. The 'Approve...' and 'Approve All...' buttons are circled in red. Below these are buttons for 'Upload Return for selected Source...', 'Upload Multiple Returns (zip file)...', 'Agent Administration...', 'Launch Reports...', 'Queue Management...', 'Change Queue...', and 'Move to this queue...'. There is also a dropdown menu for selecting a queue.

## Deleting a return

This function allows the local authority user to delete a selected school return. First highlight the school on the screen then select the delete button. This will delete the return and that school status will reset to no data.

## Exporting a return

Once the data has been submitted you can produce an export. An export will show all data submitted in either xml or csv (spreadsheet) format. You can then save a hard copy of the submitted data for reference.

To export the data, choose one of the three export options by clicking the button from the front screen.

The screenshot shows the 'MY SOURCES' interface. At the top, there are filter fields for Name, Native ID, Status, Org Group, and Queue. Below this is a 'Performance summary' table:

Expected	Outstanding	Submitted	Approved	Authorised	Errors		
					E	Q	OK
5	2	3	0	0	7	1	0

Below the summary is a table of sources:

Source ID	Source Name	Status	SubmittedDate	ApprovedDate	AuthorisedDate	Queue	Errors	Queries	OK Errors
0014000	TDUSchool1	Submitted	21/05/2015				2	0	0
0014009	TDUSchool10	Submitted	20/05/2015				3	0	0
0014002	TDUSchool3	No_Data					0	0	0
0014003	TDUSchool4	Submitted	01/06/2015				2	1	0
0014004	TDUSchool5	No_Data					0	0	0

At the bottom, there are several buttons: 'Open Return...', 'Approve...', 'Approve All...', 'Disapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. The 'Export Selected...', 'Export Multiple...', and 'Export All...' buttons are circled in red.

Select the format for the export, xml or csv then select the export button. You will be prompted to save or open the export file. Once this has run you will get an option to open or save the export.

The screenshot shows the 'CHOOSE EXPORT FORMAT' dialog box. It contains the following text and options:

**Export the current data for the selected Source**

Please select the format that you wish to export this data:

- Export as XML
- Export as CSV

Please Select the Status that you wish to export this data: Either:

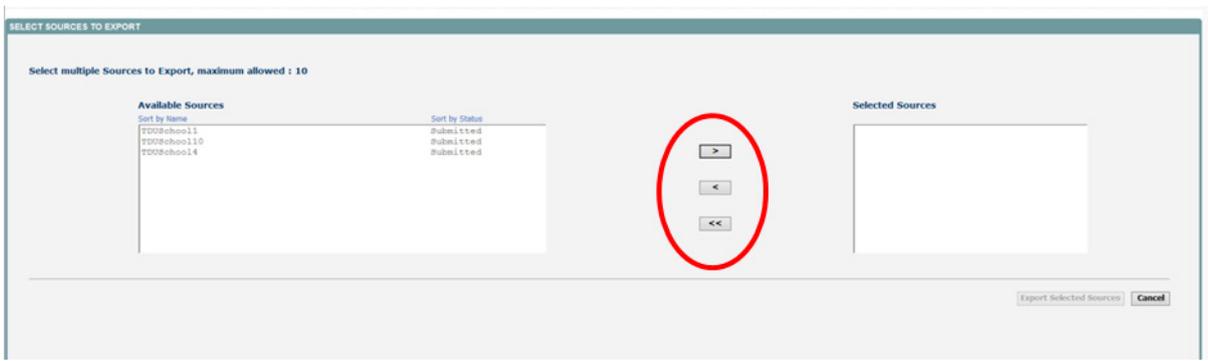
- All

Or one or more of the following

- Loaded and validated
- Amended by source
- Submitted
- Amended by agent
- Approved
- Amended by collector
- Authorised

At the bottom, there is a blue 'Export' button with a right-pointing arrow, which is circled in red.

If exporting multiple returns you will be presented with the following, select sources to export screen.



Select available sources and use the arrow keys to move them into or out of the selected sources. Once you are happy with your selection, use the export selected sources button.

## Launching reports

The launch reports option is available for each collection. This is where you can run various reports such as expected lists, error reports and school status reports amongst others.

Select the report you require from the drop down list and select the launch report button.



The report will show on screen. Selecting the export button will bring up a drop down list of export options. Selecting one will allow you to export the report to excel, csv, etc.

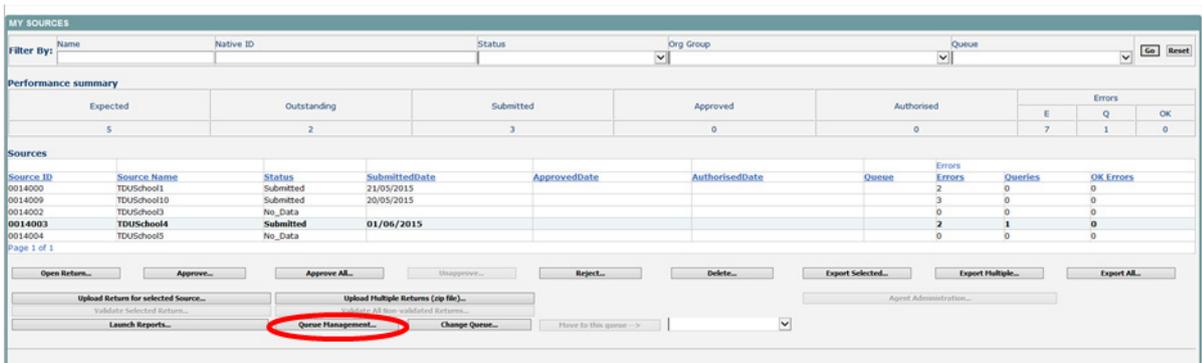
You cannot print or sort the data in the report from COLLECT you need to export into Excel to be able to sort or print the data.



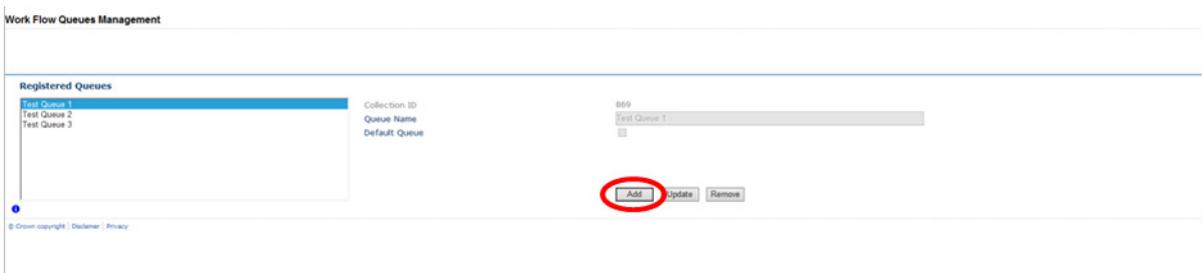
# Queues

When a number of people are working on a data collection within the local authority, 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 schools and therefore helps to ensure that two or more people don't try and work on the same one.

Return to the agent page and click the queue management button.



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



To add a name, click the add button.

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

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

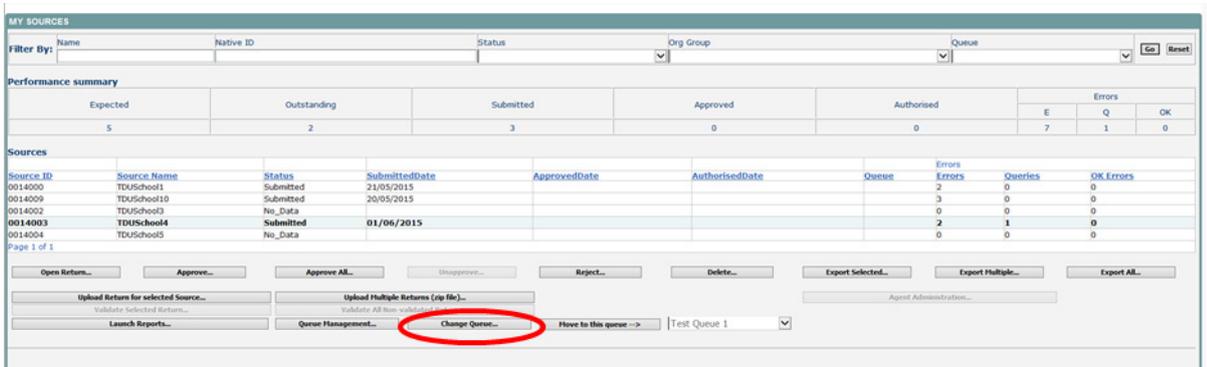
Use the update button to modify a selected name or description.

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

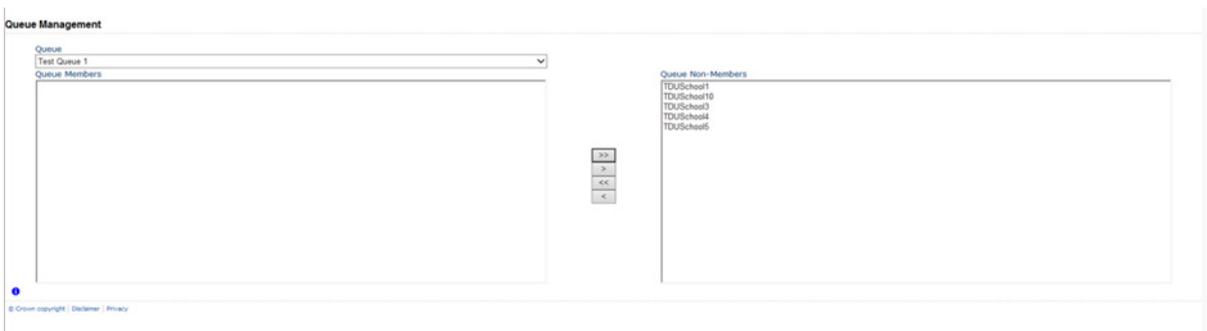
The check box used to set the default queue was originally intended to allow a default queue to be allocated for a workflow stage; however the emerging requirement for the

use of queues is for local authorities to assign their own as they work in different ways. It is therefore not applicable and has no effect on queues.

To add schools to the newly created queues return to the agent page and click the change queue button to go to the screen entitled queue management.



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



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

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

Return to the agent page and you will see that the selected school has now been assigned to the selected queue.

The screenshot shows the 'MY SOURCES' interface. At the top, there are filter options for Name, Native ID, Status, Org Group, and Queue. Below this is a 'Performance summary' table with columns for Expected, Outstanding, Submitted, Approved, Authorised, and Errors (E, Q, OK). The 'Sources' table below lists several sources with columns for Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The 'Queue' column for source 0014003 is highlighted with a red circle and labeled 'Test Queue 1'. At the bottom, there are several action buttons, including 'Open Returns...', 'Approve...', 'Approve All...', 'Disapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. A 'Move to this queue' button is also present, with a dropdown menu showing 'Test Queue 1' selected.

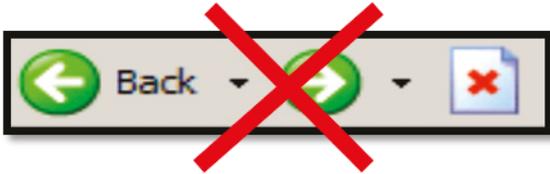
An alternative way to attach a school to a particular person is to highlight the school under source name and then click the move to this queue button. This is a safer way to allocate schools to queues because you can see if any schools are already allocated to another queue first.

The screenshot shows the 'MY SOURCES' interface. At the top, there are filter options for Name, Native ID, Status, Org Group, and Queue. Below this is a 'Performance summary' table with columns for Expected, Outstanding, Submitted, Approved, Authorised, and Errors (E, Q, OK). The 'Sources' table below lists several sources with columns for Source ID, Source Name, Status, SubmittedDate, ApprovedDate, AuthorisedDate, Queue, Errors, Queries, and OK Errors. The 'Queue' column for source 0014009 is highlighted with a red circle and labeled 'Test Queue 2'. At the bottom, there are several action buttons, including 'Open Returns...', 'Approve...', 'Approve All...', 'Disapprove...', 'Reject...', 'Delete...', 'Export Selected...', 'Export Multiple...', and 'Export All...'. A 'Move to this queue' button is also present, with a dropdown menu showing 'Test Queue 2' selected.

Using the queue facility as indicated above should enable a number of individuals to work on a data collection without running the risk of duplicating effort.

## Screen functionality

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



Don't use the browser buttons. When in the data collection, unpredictable behaviour may be experienced if you use the back or 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, for example '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, for example assessments	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 bars

<b>UPN</b>	<input type="text"/>	<b>Surname</b>	<input type="text"/>	<b>Forename</b>	<input type="text"/>
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Only available on screens that could have a large record set record list. These allow you to sort the records on the screen.

## Left hand menu

The left hand menu can also be used to migrate to different screens.

The screenshot shows a software interface with a left-hand menu and a main content area. The left-hand menu is titled "LA KS1 [2]" and contains a tree view with "Pupil" expanded, showing "PupilOverview" and "Assessment". The main content area has a title bar "LA KS1 - TDUSchool4" and a subtitle "RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)". Below this is a table with two columns: "Data Item" and "Value". The table contains the following data:

Data Item	Value
Document Name	Key Stage 1 Transfer File
Document Creation DateTime	2015-06-22 02:59:58
Year	2015
LA	001
Software Code	CCS - One
Establishment Number	4003
Number of Pupils In Error	0
Pupils	
Pupil Overview	

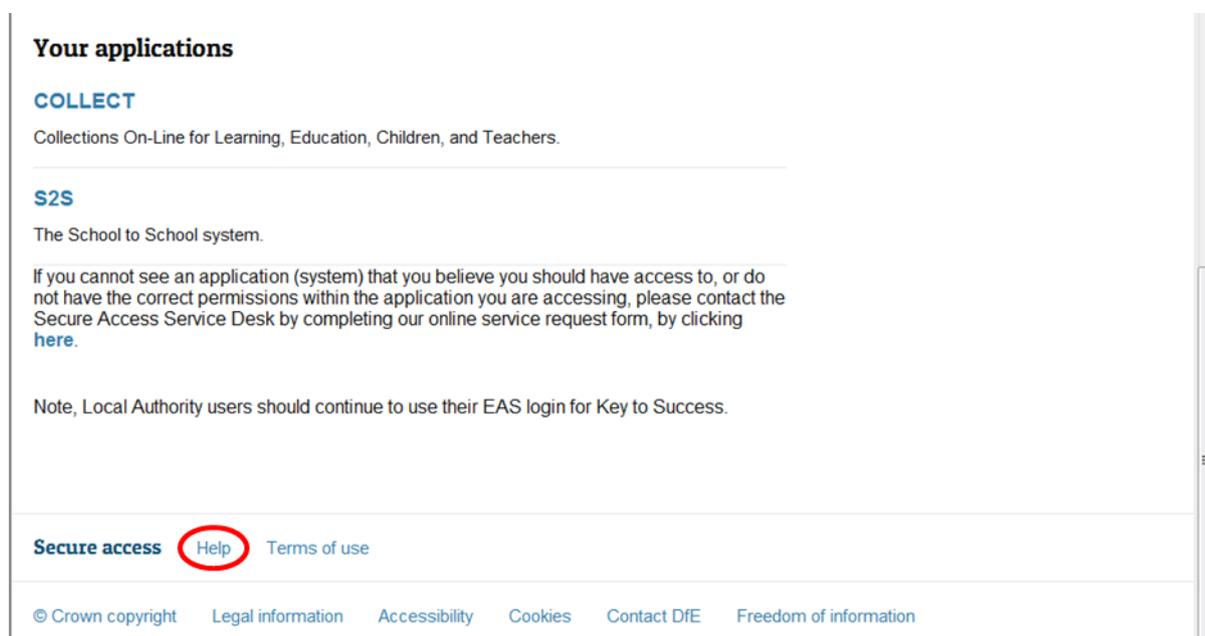
# Help

## COLLECT issues and data collection queries

If you are experiencing problems with COLLECT or have a data collection query, please submit a [data collection service request form](#) to the Data Collections Helpdesk.

If you are having problems logging into Secure Access, please refer to the 'Help' section on Secure Access. If you are still unable to resolve your issue, please submit a [service request](#) to the Secure Access service desk.

## Secure Access issues



The screenshot shows a web page titled "Your applications" with two main sections: "COLLECT" and "S2S". The "COLLECT" section describes it as "Collections On-Line for Learning, Education, Children, and Teachers." The "S2S" section describes it as "The School to School system." Below these sections is a paragraph of text: "If you cannot see an application (system) that you believe you should have access to, or do not have the correct permissions within the application you are accessing, please contact the Secure Access Service Desk by completing our online service request form, by clicking [here](#)." A note follows: "Note, Local Authority users should continue to use their EAS login for Key to Success." At the bottom of the page, there is a navigation bar with links for "Secure access", "Help", and "Terms of use". The "Help" link is circled in red. Below the navigation bar is a footer with links for "© Crown copyright", "Legal information", "Accessibility", "Cookies", "Contact DfE", and "Freedom of information".

**Your applications**

**COLLECT**  
Collections On-Line for Learning, Education, Children, and Teachers.

**S2S**  
The School to School system.

If you cannot see an application (system) that you believe you should have access to, or do not have the correct permissions within the application you are accessing, please contact the Secure Access Service Desk by completing our online service request form, by clicking [here](#).

Note, Local Authority users should continue to use their EAS login for Key to Success.

**Secure access** [Help](#) [Terms of use](#)

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Department  
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email [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk)

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

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