



Department
for Education

School Workforce Census 2013

COLLECT guide for maintained schools

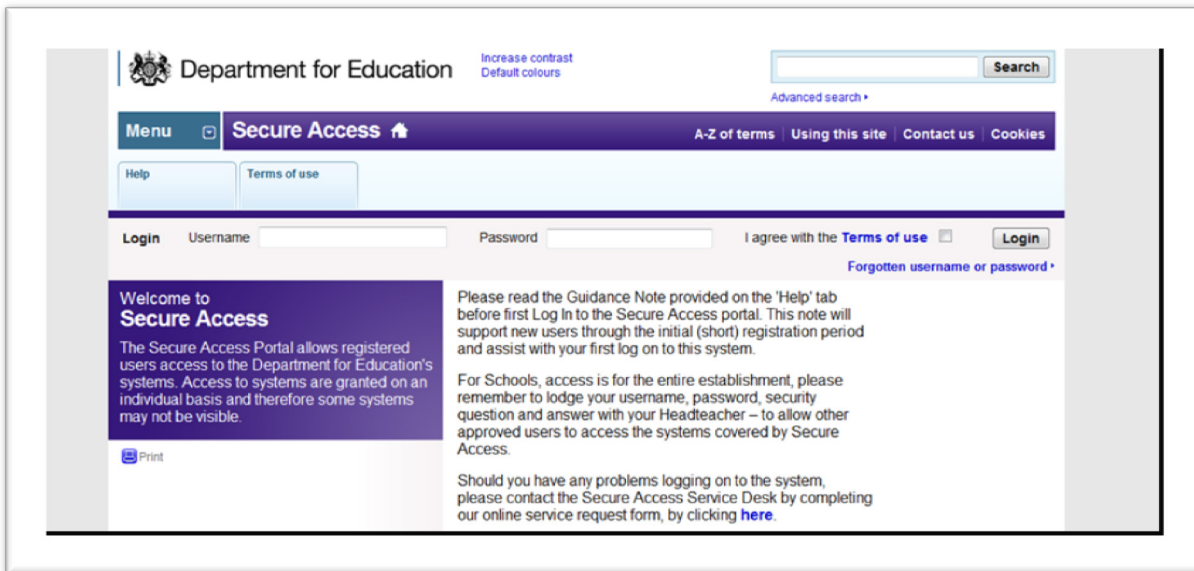
August 2013

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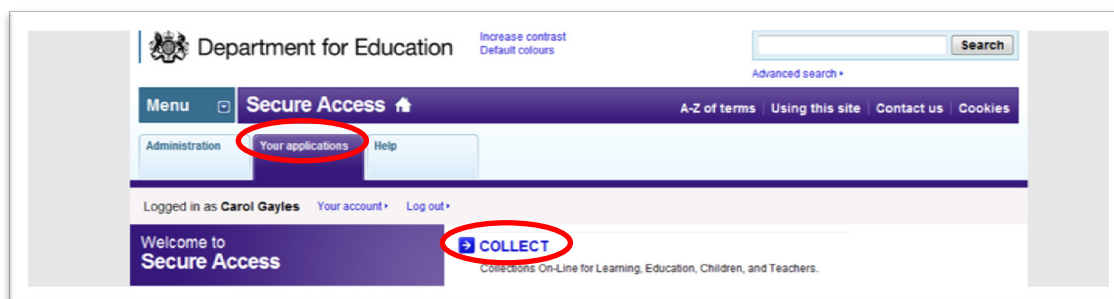
COLLECT and Secure Access

Access to COLLECT is now through the Department's Secure Access System (SA), <https://sa.education.gov.uk/idp/Authn/UserPassword> which was implemented on 10 December 2012.



To access Secure Access existing users will need their COLLECT username and password, which should have been retained from the 2012 data collection, If you have any issues with the Secure Access site please complete a ['Service Request' form](#) on our website.

Full Secure Access guidance is published on the [Secure Access Website](#).



Once successfully registered, open the **'Your applications'** tab to access COLLECT, as above.



Then click on to **'Continue'** to enter Collect as above.

If you are bounced back to your homepage at this point please check that you are not trying to access the site from a link within an e-mail. Please copy and paste the address into the address bar then save it to your favourites.

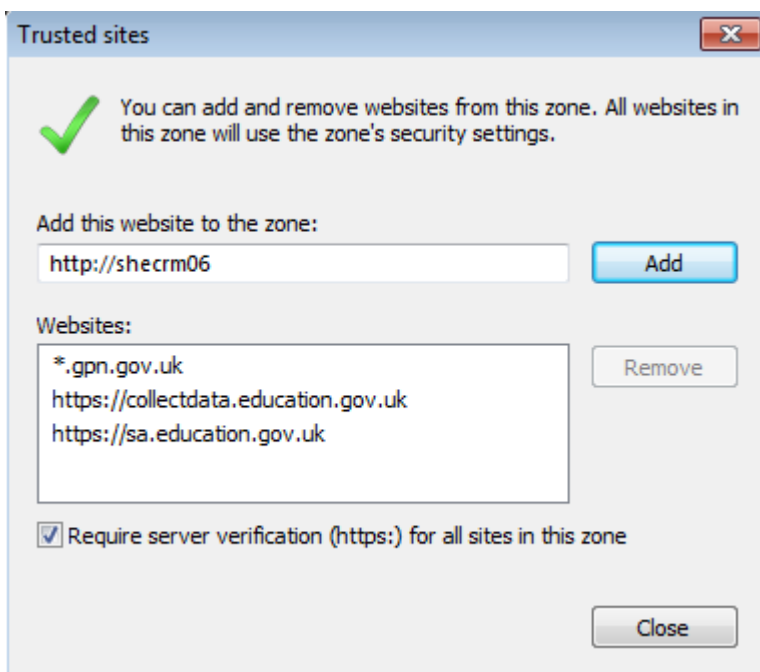
Please follow the steps below to add the web addresses to your trusted sites

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:

<https://collectdata.education.gov.uk>

Then select ok and ok. Please check that the secure access site is also in the trusted sites The addresses should appear in the large box .



Source Page Screen

The Source main screen will be displayed

Data Collection	User Role	Organisation	Status	Due Date	Days Due
Standards Fund 2010	Source	Hackney	Open	12/10/2010 00:00:00	-1044
Standards Fund 2010	Collector	Department for Education	Open	12/10/2010 00:00:00	-1044
SchoolWorkforceCensus2013	Collector	Department for Education	Open	09/12/2012 00:00:00	-255
SchoolWorkforceCensus2013	Source	Alexandra Infant School	Open	09/12/2012 00:00:00	-255
SchoolWorkforceCensus2013	Administrator	Department for Education	Open/Live	09/12/2012 00:00:00	-255
SchoolWorkforceCensus2012	Administrator	Department for Education	Testing/Live	09/12/2012 00:00:00	-255
SchoolWorkforceCensus2012	Collector	Department for Education	Testing	09/12/2012 00:00:00	-255
SchoolWorkforceCensus2011	Administrator	Department for Education	Testing/Offline	11/12/2011 00:00:00	-619
SchoolCensus 2011_Autumn	Collector	Department for Education	Open	06/10/2011 00:00:00	-685
SchoolCensus 2010_Spring	Collector	Department for Education	Open	21/01/2010 00:00:00	-1308

Page 1 of 4

Select Data Collection

News

Welcome to **GENERIC UAT COLLECT (Collections On-Line for Learning, Education, Children, and Teachers)**.
COLLECT is the DfE Centralised Data Collection and Management System for Education

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 Source main screen will be displayed

Source Page SchoolWorkforceCensus2013

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

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

I need some help

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

For further help please contact the help desk on 01325 392626 and select Option 1, or email dsg.helpdesk@education.gsi.gov.uk

The screen is divided into three main sections:

- Return Status;
- Return Management;
- Return Progress.

Return Status

The status of your data return :

Errors : Queries : OK Errors :

This shows the current status of the return and a breakdown of the errors within it. All information is read only. In the example above no return data has been uploaded so status reads 'No_Data'

Return Management

What can I do with My Data Return?

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

Provides a set of functions that can be used to manage the return. Those with bold text and highlighted borders are available. The availability of the functions is dictated by the status of the return..

Return Progress

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted <input type="text"/>	Date Approved <input type="text"/>	Date Authorised <input type="text"/>
View submitted data return...	View approved data return...	View authorised data return...
Export submitted data return...	Export approved data return...	Export authorised data return...

This shows the dates on which the return completed the three process milestones. This section is completed automatically as the return progresses through the workflow process.

Uploading a Return

Click on the **Upload return from file** button

What can I do with My Data Return?

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

SchoolWorkforceCensus2013 - Upload File

UPLOAD FILE SELECTION

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

Upload

Use the **browse** button to locate the XML file. Highlight the file name and click on **Open** to select the return

Choose File to Upload

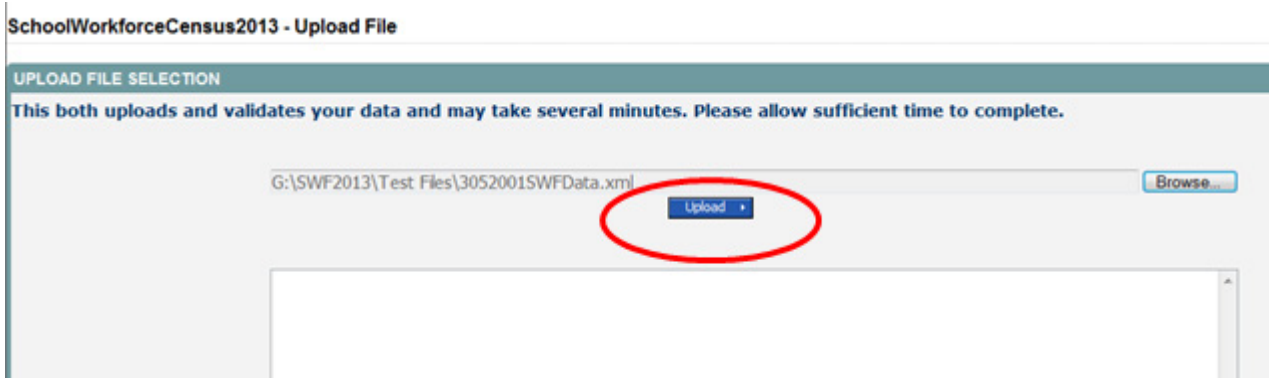
File Explorer window showing the file selection process. The file **3052001SWFData.xml** is highlighted in the file list. The file name is entered in the File name field.

Name	Date modified	Type
3052001SWFData.xml	21/08/2013 08:56	XML

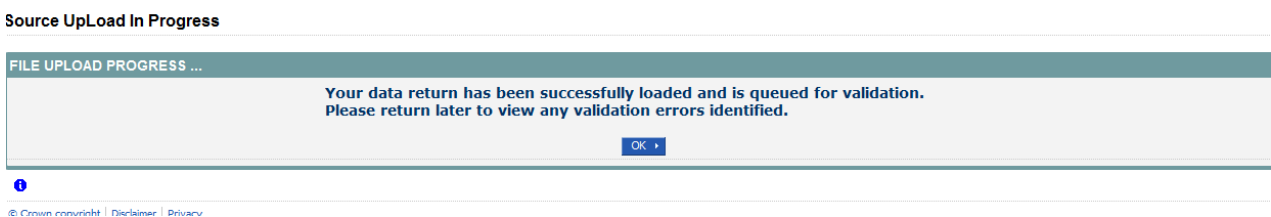
File name: 3052001SWFData.xml All Files (*.*)

Open Cancel

Click on the upload button to load the return

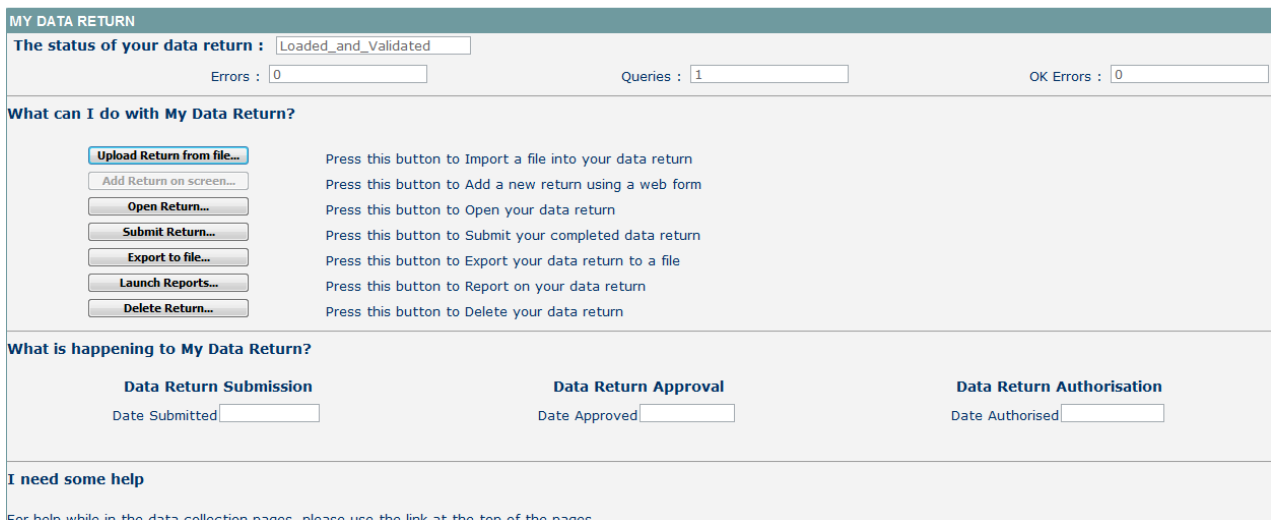


Once the return has been loaded, the following message will be displayed on screen



This indicates that the return has successfully loaded and is now placed in the validation queue to be validated. Press the OK button to return to the source main page. During periods of heavy demand, there may be a delay before the return is validated. Whilst the return has a status of "Waiting_for_validation" then the return cannot be viewed or edited.

Source Page SchoolWorkforceCensus2013



Once the return has been validated, the return status section on main page will display "Loaded" and the total number of errors and queries found in the return will be displayed. Additional function buttons will also be available in the Return Management section.

Viewing the Data Return

Opening the Return

Open the return by clicking on the **Open Return** button. The header information for the return will be displayed.

Source Page SchoolWorkforceCensus2013

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

What can I do with My Data Return?

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

What is happening to My Data Return?

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

I need some help

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

School Workforce Annual Collection

- [-] School Workforce Annual Collection [1]
 - [-] Source
 - [-] CBDS Levels
 - [-] SchoolWorkforceModules
 - [-] School Workforce Member [1]
 - [-] Given Name
 - [-] Former Family Name
 - [-] Contract or Service [2]
 - [-] Additional Payment
 - [-] Role [2]
 - [-] Additional Payment
 - [-] Absence
 - [-] Curriculum
 - [-] Qualification
 - [-] Subjects
 - [-] School
 - [-] Vacancy
 - [-] Occasionals
 - [-] Agency TP Support Count

School Workforce Annual Collection - Alexandra Infant School

RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)				Errors	Queries	OK	Return Level Notes
				0	1	0	
Data Item	Value	Errors			Notes	History	
HEADER INFORMATION							
Collection	School Workforce Census	0	0	0			
Year	2013	0	0	0			
Reference Date	2013-11-07	1	0	0			
View Source Details						View All	

Screen Functionality

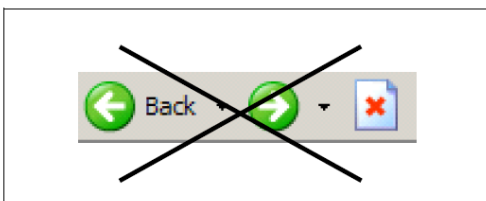
Before viewing the return it is useful to understand some of the basic controls and screen operations.

Screen Navigation

To return to the previous page, press the 'Drill Up' button.

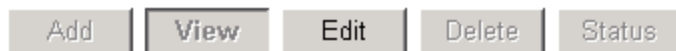
The screenshot shows the 'School Workforce Member' interface. At the top, there are buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. Below this, a navigation pane on the left lists various categories like 'Source', 'CBOS Levels', and 'School Workforce Member'. The main area displays a table of workforce members with columns for 'Teacher Number', 'Family Name', 'Gender', 'Date of Birth', and 'QT Status'. A 'Drill Up' button is circled in red. Below the table, there is a detailed view of a specific member, including 'Staff Details' and 'Former Family Name(s)'. A tooltip is visible over the 'Former Family Name(s)' section, stating 'Click to view previous family names for this member of the workforce'.

Don't use the browser buttons! When in the data collection, unpredictable behaviour may be experienced if you use the back/forward buttons on your web browser's toolbar.



Mode Buttons

Those buttons determine which operation mode the on-screen data form is in, and which operations are available



Dark Grey text on sunken button with light border = Active Mode
 Black Text on button and highlighted border = Available Mode
 Light Grey text on button with light border = Unavailable Mode

Filter Left Hand Menu

Please avoid using the left hand filter menu (**grey panel on the left hand side of the page**) to navigate through the return as it does not always display sections of the return in the correct format and functions such as Add or Edit are not always available

School Workforce Member

> 2001,305,S

School Workforce Annual Collection [1]

- Source
- CBDS Levels
- SchoolWorkforceModules
- School Workforce Member [1]
 - Given Name
 - Former Family Name
 - Contract or Service [2]
 - Additional Payment
 - Role [2]
 - Additional Payment
 - Absence
 - Curriculum
 - Qualification
 - Subjects
- School
 - Vacancy
 - Occasionals
 - Agency TP Support Count
 - LA

School Workforce Member - Alexandra Infant School

FilterTeacher **Family** **Gender** **Date of Birth** **QT Status**

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher,One	Female	1963-06-08	True	0
80756915	Regular,Teacher, Two	Male	1980-09-25	True	1

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
WORKFORCE MEMBER						
Staff Details						
Teacher Number	8023415	0	0	0		
Family Name	Regular Teacher	0	0	0		
Given Name						
One						
View Given Name(s)						View All
Former Family Name						
View Former Family Name(S)						View All
NI Number	WA145678B	0	0	0		
Gender	Female	0	0	0		
Date of Birth	1963-06-08	0	0	0		
Ethnic Code	Any Other White Background	0	0	0		
Disability	No	0	0	0		
QT Status	True	0	0	0		
HLTA Status	False	0	0	0		
QTS Route		0	0	0		
View Contract/Agreement Details						View All

Viewing the Return Details

Access the source details by clicking on the **View All** button in the 'View Source Details' row on the original screen displaying the header details for the return.

School Workforce Annual Collection

All Errors All Notes Add View Edit Delete Status

School Workforce Annual Collection [1] School Workforce Annual Collection - Alexandra Infant School

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

Errors	Queries	OK	Return Level Notes
0	1	0	

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
HEADER INFORMATION						
Collection	School Workforce Census	0	0	0		
Year	2013	0	0	0		
Reference Date	2013-11-07	1	0	0		
View Source Details						
						View All

Now access the workforce member details by clicking on the **View All** button in the 'View School Workforce Members' row

Source

All Errors All Notes Add View Edit Delete Status

School Workforce Annual Collection [1] Source - Alexandra Infant School

Drill Up Error All Notes

LA	Estab	Source Level	Software Code	Rule Errors
BROMLEY	2001	School	SIMS	0

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
SOURCE						
Source Level	School	0	0	0		
LA	BROMLEY	0	0	0		
Estab	2001	0	0	0		
Software Code	SIMS	0	0	0		
Release	2	0	0	0		
Xversion		0	0	0		
Serial No	1	0	0	0		
DateTime	2013-11-08 11:14:05	0	0	0		
View CBDS Levels						
View School Workforce Modules						
View School Workforce Members						
View School Details						
View LA Details						

This displays the 'Records List' section, with all members of staff visible

Record List

Clicking on one of the blue column headers e.g. 'Date of Birth' will order all the records in date of birth. The record list can be sorted ascending or descending by clicking once or twice on the header of any of the columns.

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher,One	Female	1963-06-08	True	0
8035261	Teacher,Three	Male	1973-08-12	True	1
8023416	Teacher,Two	Female	1980-09-25	True	1

The lower part of the screen will show the record details of the record highlighted in the top half of the screen

School Workforce Member - Alexandra Infant School Drill Up Error

All Notes

FilterTeacher By: Number Family Name Gender Date of Birth QT Status Reset Go

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher,One	Female	1963-06-08	True	0
80756915	Regular,Teacher, Two	Male	1980-09-25	True	1

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
WORKFORCE MEMBER						
Staff Details						
Teacher Number	8023415	0	0	0		
Family Name	Regular Teacher	0	0	0		
Given Name						
One						
View Given Name(s)						View All
Former Family Name						
View Former Family Name(S)						View All
NI Number	WA145678B	0	0	0		
Gender	Female	0	0	0		
Date of Birth	1963-06-08	0	0	0		
Ethnic Code	Any Other White Background	0	0	0		
Disability	No	0	0	0		
QT Status	True	0	0	0		
HLTA Status	False	0	0	0		
QTS Route		0	0	0		
View Contract/Agreement Details						View All
View Absence Details						View All
View Curriculum Details						View All
View Qualification Details						View All

You can sort the record set by given name by clicking on the 'Name' column in the 'Record List' section

School Workforce Member Drill Up Error

All Notes

FilterTeacher By: Number Family Name Gender Date of Birth QT Status Reset Go

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher,One	Female	1963-06-08	True	0
8023514	Teacher Regular,Two	Female	1980-09-25	True	0
8032659	Teacher,Three	Male	1985-07-25	True	0

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		

You can also filter the record set by typing the surname in the 'Family Name' box in the 'Filter Section' and then click on the **Go** button. The record details for that staff member should be displayed on screen.

School Workforce Member -

Drill Up Error

All Notes

FilterTeacher By: Number **Family Name** Gender Date of Birth QT Status Reset Go

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher,One	Female	1963-06-08	True	0
8023514	Teacher Regular,Two	Female	1980-09-25	True	0
8032659	Teacher,Three	Male	1985-07-25	True	0

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		

Editing within the Data Return

Where possible data should be amended within the Schools Management Information System and a new return re-uploaded.

The default view when a screen is displayed is 'View' mode. To edit the details click on the 'Edit' button. The details for the workforce member will now be available to edit

School Workforce Member

2001,305,5

School Workforce Annual Collection [1]

Source

- CSOS Levels
- SchoolWorkforceModules
- School Workforce Member [1]
 - Given Name
 - Former Family Name
 - Contract or Service [2]
 - Additional Payment
 - Role [2]
 - Additional Payment
 - Absence
 - Curriculum
 - Qualification
 - Subjects
 - School
 - Vacancy
 - Occasionals
 - Agency TP Support Count
 - LA

School Workforce Member - Alexandra Infant School

Filter Teacher By: Number Family Name Gender Date of Birth QT Status

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher,One	Female	1963-06-08	True	0
80756915	Regular Teacher, Two	Male	1980-09-25	True	1

Data Item Value Errors Queries OK Notes History

WORKFORCE MEMBER

Staff Details

Teacher Number	8023415	0	0	0	0	
Family Name	Regular Teacher	0	0	0	0	

Given Name

One

View Given Name(s) View All

Former Family Name

View Former Family Name(S) View All

Nil Number	WA145678B	0	0	0	0	
Gender	Female	0	0	0	0	
Date of Birth	1963-06-08	0	0	0	0	
Ethnic Code	Any Other White Background	0	0	0	0	
Disability	No	0	0	0	0	
QT Status	True	0	0	0	0	
HLTA Status	False	0	0	0	0	
QTS Route		0	0	0	0	

View Contract/Assessment Details View All

Click on the 'QTS Route' cell in the 'Value' column: a drop down list of selectable values will be displayed.

School Workforce Member - Alexandra Infant School

Filter Teacher By: Number Family Name Gender Date of Birth QT Status

Teacher Number	Name	Gender	Date of Birth	QT Status	Rule Errors
8023415	Regular Teacher, One	Female	1963-06-08	True	0
80756915	Regular Teacher, Two	Male	1980-09-25	True	1

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
WORKFORCE MEMBER						
Staff Details						
Teacher Number	8023415	0	0	0		
Family Name	Regular Teacher	0	0	0		
Given Name						
One						
View Given Name(s)						View All
Former Family Name						
View Former Family Name(S)						View All
NI Number	WA145678B	0	0	0		
Gender	Female	0	0	0		
Date of Birth	1963-06-08	0	0	0		
Ethnic Code	Any Other White Background	0	0	0		
Disability		0	0	0		
QT Status	True	0	0	0		
HLTA Status	False	0	0	0		
QTS Route		0	0	0		
View Contract/Agreement Details						View All
View Absence Details						View All
View Curriculum Details						View All
View Qualification Details						View All
<ul style="list-style-type: none"> Annual College Exit - Graduate Course Annual College Exit - Post Graduate Course Overseas Trained Teacher Programme Overseas Trained Teacher, not yet on Programme Registered Teacher Programme Graduate Teacher Programme Teach First Programme Mutual Recognition from NI, Scotland or the EU Flexible Routes 						

Selecting Annual College Exit – Graduate Course from the list. The selected value will be displayed and the details will be saved. If data is entered rather than selected from a list, navigating to another field or hitting the return/enter key will save the data

Editing existing information will create a history record for the item that has been changed/added

School Workforce Member - Alexandra Infant School						
Filter Teacher By: Number	Family Name	Gender	Date of Birth	QT Status	Reset	Go
8023415	Regular Teacher, One	Female	1963-06-08	True	0	
80756915	Regular Teacher, Two	Male	1980-09-25	True	1	
Data Item	Value	Errors			Notes	History
WORKFORCE MEMBER						
Staff Details						
Teacher Number	8023415	0	0	0		
Family Name	Regular Teacher	0	0	0		
Given Name						
One						
View Given Name(s)						View All
Former Family Name						
View Former Family Name(S)						View All
NI Number	WA145678B	0	0	0		
Gender	Female	0	0	0		
Date of Birth	1963-06-08	0	0	0		
Ethnic Code	Any Other White Background	0	0	0		
Disability		0	0	0		
QT Status	True	0	0	0		
HLTA Status	False	0	0	0		
QTS Route	Annual College Exit - Graduate Course	0	0	0		
View Contract/Agreement Details						View All
View Absence Details						View All
View Curriculum Details						View All
View Qualification Details						View All

Changed items are identified by an icon displayed in the 'History' column

Click on the 'History' icon for the 'QTS Route' item that we have just amended. Details of all changes made to the item are displayed (1 row per change), including the name of the user who made the change

Data Log Page						
History Report - SchoolWorkforceCensus2013						Back
Alexandra Infant School						
History report on 21/08/2013 at 10:50:50						
Data QTS Route						
Filter By:	Action	User	Start Date	End Date	Go	
Action	Old Value	New Value	User	Role	Organisation	Date
Update	Teach First Programme	Annual College Exit - Graduate Course	Christine Rutherford	Source	Department for Education	21/08/2013 10:50:46

Errors

When a return has been uploaded a number of validation checks are run against the data in that return and all errors and queries are highlighted in red against the relevant data item. There are different 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

MY DATA RETURN

The status of your data return :

Errors : Queries : OK Errors :

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, e.g. the school return must contain details on occasional teachers and a return-level error is generated if this information is missing.

Return level errors are displayed and are accessible from the 'Header Information' screen

School Workforce Annual Collection - Alexandra Infant School							
RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)				Errors	Queries	OK	Return Level Notes
				0	1	0	
Data Item	Value	Errors			Notes	History	
HEADER INFORMATION							
Collection	School Workforce Census	0	0	0			
Year	2013	0	0	0			
Reference Date	2013-11-07	1	0	0			
View Source Details						View All	

Data Item Level Errors and Queries

Data item errors are highlighted against the item to which they relate. **All** data items that are part of a failed validation rule will contain an error marker, not only the item containing the potentially invalid value. E.g. the rule that checks whether a person appears to be aged over 100 years compares the date of birth with the date of the census, so both items would be flagged if that validation failed, even though it is probably only the date of birth that is wrong.

From the Workforce Members screen, select the record, then click **View All** in the 'View Absence Details' row. Errors are displayed against the 'First Day' and 'Last Day' data items in the 'Errors' section of the screen.

Click on the red box in the row for 'Last Day'. An error report will be displayed showing all errors and queries associated with that data item

Absence - Alexandra Infant School						Drill Up	Error	
						All Notes		
Name	NI Number	First Day	Last Day	Absence Category	Rule Errors			
Regular Teacher,One	WA145678B	2013-06-04	2013-06-03	Sickness	1			
Data Item	Value			Errors			Notes	History
				Errors	Queries	OK		
ABSENCE								
First Day	2013-06-04			1	0	0		
Last Day	2013-06-03			1	0	0		
Working Days Lost	2.0			0	0	0		
Absence Category	Sickness			0	0	0		
Estab	2222			0	0	0		

Blade Error Report - SchoolWorkforceCensus2013

Alexandra Infant School Error report on 21/08/2013 at 11:01 Return

Data Field FirstDayOfAbsence

Priority Errors Count 1

Rule No.	Error Message	Details	Notes
4940	Last Day of absence cannot be before First Day of absence		
Page 1 of 1			

Priority Queries Count 0

Rule No.	Error Message	Notes
Page 1 of 1		

Priority OK Count 0

Rule No.	Error Message	Priority	Notes
Page 1 of 1			

The report shows that 'Last Day of absence' cannot be before the 'First Day of absence'. To see all the data items that are possibly affected by this validation click on the **Details** button next to the error message.

Blade Error Report - SchoolWorkforceCensus2013

Alexandra Infant School Error report on 21/08/2013 at 11:03 Return

Data Field FirstDayOfAbsence

Priority Errors Count 1 **Details**

Rule No.	Error Message	Details	Notes
4940	Last Day of absence cannot be before First Day of absence		
Page 1 of 1			

Field	Value
First Day	Jun 4 2013 12:00AM
Last Day	Jun 3 2013 12:00AM

Priority Queries Count 0

Rule No.	Error Message	Notes
Page 1 of 1		

Priority OK Count 0

Rule No.	Error Message	Priority	Notes
Page 1 of 1			

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. Change the mode of the form to 'Edit' and then click on the data item that needs to be changed

Please contact your Local Authority contact for advice

Viewing Errors and queries

To view all errors and queries on the return click on the 'All Errors' button

2001,305,S > Regular Teacher,WA145678B,08/06/1963

School Workforce Annual Collection [1]

School Workforce Member [1]

Absence - Alexandra Infant School

Name	NI Number	First Day	Last Day	Absence Category	Rule Errors
Regular Teacher,One	WA145678B	2013-06-04	2013-06-03	Sickness	1

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
ABSENCE						
First Day	2013-06-04	1	0	0		
Last Day	2013-06-03	1	0	0		
Working Days Lost	2.0	0	0	0		
Absence Category	Sickness	0	0	0		
Etab	2222	0	0	0		

This will show you a list of all queries and errors. You can see the error number, message and also click on 'details' to see what data is not passing validation

You can click on the underlined data values to the left of the screen to be taken to that field in the return

Blade Error Report - SchoolWorkforceCensus2013

Alexandra Infant School Error report on 21/08/2013 at 11:10

Count 5

Rule No.	Return Level	Error Message	Priority	OK'd	Notes	Field	Value
4160Q		Member of workforce with missing NI Number	Queries	Details		NI Number	<u>nil</u>
4735		Hours worked per week must not be provided for both Post and Role for the same Contract / Service Agreement	Errors	Details			
6530		The same person has a total Full Time Equivalent ratio greater than 1.5	Errors	Details			
6540Q	Y	At least one staff record in this school's return should show a role of Head Teacher	Queries				
4940		Last Day of absence cannot be before First Day of absence	Errors	Details			

Page 1 of 1

Providing Clarification/ Supplementary Information

In some instances it may be useful to add explanatory information about a data value, in particular when an item has an associated query against it.


There are several levels where you can add Notes, return level, field level, Error level and in All errors against the query. **All Notes should be in the return level section on the front page of the return to avoid being deleted should you need re upload the return**




To add a return level note click on the pen icon in the return level notes section

School Workforce Annual Collection

All Errors All Notes Add View Edit Delete Status

School Workforce Annual Collection [1] School Workforce Annual Collection - Alexandra Infant School

	Errors	Queries	OK	Return Level Notes
RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)	0	1	0	

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
HEADER INFORMATION						
Collection	School Workforce Census	0	0	0		
Year	2013	0	0	0		
Reference Date	2013-11-07	1	0	0		
View Source Details						
View All						

Click add new note and type your note and the error number in the box provided and click create. – Do this for all queries/errors you need to provide extra information for.

Note Page

Notes - SchoolWorkforceCensus2013

User	Role	Organisation	Native ID	Date and Time	
					 Add New Note  Remove Note

Note Detail

Preserved notes deleted by resubmissions

User	Role	Organisation	Native ID	Date and Time	
					 Remove Preserved Note

Preserved Note Detail

Note Page

Create New Note

type explanation here

Create **Cancel**

The note will be saved and a record row will be created showing who created the note and when.

Note Page

User	Role	Organisation	Native ID	Date and Time	
crutherford	Source	Department for Education	001	21/08/2013 11:17:07	Add New Note

Note Detail

type explanation here

Return to the previous screen by clicking on 'back'. The pen icon will have changed to a notepad icon, which shows that the item has one or more notes attached to it. You are able to record notes in both **Edit** and **View** modes.

School Workforce Annual Collection

All Errors All Notes Add View Edit Delete Status

School Workforce Annual Collection [1] School Workforce Annual Collection - Alexandra Infant School		Errors	Queries	OK	Return Level Notes
RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)		0	1	0	
Data Item	Value	Errors	Queries	OK	Notes
HEADER INFORMATION					
Collection	School Workforce Census	0	0	0	
Year	2013	0	0	0	
Reference Date	2013-11-07	1	0	0	
View Source Details					View All

Submitting your return

Once the school is happy with their return they will need to submit it. Until the return has been submitted the Authority will not be able to edit and approve the return; prior to submission they will only be able to view it **so it is important that the School, having corrected the errors remembers to go in and 'Submit' the return in order that their LA can approve the return and the DfE can authorise the return.**

To submit the return, navigate to the school main screen by clicking on **Back to MyCOLLECT page** and click on the **Submit Return** button in the 'Return Management' section. The status of the return will change to 'Submitted'.

The screenshot shows a web interface for 'MY DATA RETURN'. At the top, it says 'Source Page SchoolWorkforceCensus2013'. Below that, 'The status of your data return' is 'Amended_by_source'. There are input fields for 'Errors : 3', 'Queries : 2', and 'OK Errors : 0'. A section titled 'What can I do with My Data Return?' contains several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Submit Return...' (circled in red), 'Export to File...', 'Launch Reports...', and 'Delete Return...'. Each button has a corresponding instruction. Below this, 'What is happening to My Data Return?' shows three columns: 'Data Return Submission' with 'Date Submitted' field, 'Data Return Approval' with 'Date Approved' field, and 'Data Return Authorisation' with 'Date Authorised' field. At the bottom, there is a section 'I need some help'.

You will be asked to confirm this function,

The dialog box has a teal header 'Submit Return Confirmation'. The main text asks 'Are you sure you wish to submit this Data Return?'. At the bottom, there are two buttons: 'Yes' and 'No', both with right-pointing arrows.

MY DATA RETURN

The status of your data return : Submitted

Errors : 0 Queries : 2 OK Errors : 0

What can I do with My Data Return?

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

What is happening to My Data Return?

Data Return Submission	Data Return Approval	Data Return Authorisation
Date Submitted: 21/08/2013	Date Approved:	Date Authorised:

[I need some help](#)

Once you have submitted the button will be greyed out and the box “The status of your data return” will show as “Submitted” & the date will appear in the data submitted box in the “what is happening to my data return” section of the screen.

Your LA will then take a look at the return and they may come back to you with queries. Once they are happy with the return it will be Approved by them and the DFE will then take a look at the data and Authorise the return. Once these have been completed the subsequent dates will appear

Reports

A number of reports are available on COLLECT, return to the **Source page** by selecting **Back to My Collect page** at the top of the page and click on the **Launch Reports** button. A drop down menu will be displayed and a report can be selected from that drop down list. The following reports are available to schools.

The screenshot shows the Department for Education COLLECT Portal interface. At the top, there is a navigation bar with the Department for Education logo and a user login status: 'You are logged in as crutherford | Logout'. A red circle highlights the 'Back to My COLLECT page' button. Below the navigation bar, the page title is 'School Workforce Annual Collection'. A toolbar contains buttons for 'All Errors', 'All Notes', 'Add', 'View', 'Edit', 'Delete', and 'Status'. The main content area displays a report for 'School Workforce Annual Collection - Alexandra Infant School'. The report includes a summary table and a detailed table of data items.

RETURN LEVEL ERRORS (Errors and queries associated with this full returns, not individual fields.)		Errors	Queries	OK	Return Level Notes
		0	1	0	

Data Item	Value	Errors			Notes	History
		Errors	Queries	OK		
HEADER INFORMATION						
Collection	School Workforce Census	0	0	0		
Year	2013	0	0	0		
Reference Date	2013-11-07	1	0	0		
View Source Details						

- **Missing Contract Report** - This report identifies staff members that do not have a contract record. All staff members should have at least one 'Contract' Record unless the workforce member is included in the return only because they had an absence in the previous academic year or the school is returning a partial return i.e. the LA are providing the contract data.
- **Missing Payment Details for Contracts Report** - This report identifies staff that have one of more contract records but no payment details have been provided. People that are included in the return only because that had an absence in the previous academic year do not need payment details
- **School Error Report** - This report lists all the outstanding errors and queries on the return.
- **Notes Report** – This report allows user to select 'Alllevels', 'Returnlevel', 'Fieldlevel' and 'Errorlevel' notes. The report will included the note, the error number and id information on the school workforce member.
- **Staff Breakdown by Gender and FT/PT Report** - This report provided a breakdown of all staff members by gender and part time/full time indicator.

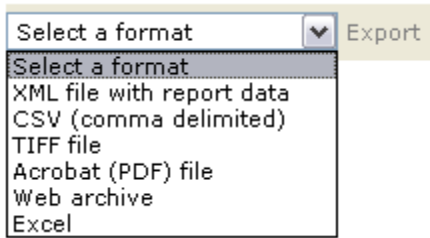
Along the top of the report you will see a toolbar with various functions.

The screenshot shows a report toolbar with various navigation and zoom controls. It includes buttons for back, forward, search, and zoom, along with a page indicator '1 of 2' and a '100%' zoom level.

- **Navigate between pages of the report.**
- **Zoom control for viewing the report at various zoom levels.**

- Enter text, to find on the report
- Refreshes the report output
- Produces a hard-copy output of the report
- Save the output created

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



Exporting a return

A return can be exported in xml or csv format by using the **Export selected**


The screenshot shows the 'MY DATA RETURN' interface. At the top, it displays 'The status of your data return : Submitted' and 'Errors : 3'. Below this, there are several buttons: 'Upload Return from file...', 'Add Return on screen...', 'Open Return...', 'Export to file...' (circled in red), 'Launch Reports...', and 'Delete Return...'. Each button has a corresponding instruction. The 'Export to file...' button is highlighted with a red circle. Below the buttons, there are three sections: 'Data Return Submission' (Date Submitted: 21/08/2013), 'Data Return Approval' (Date Approved:), and 'Data Return Authorisation' (Date Authorised:). At the bottom, there is a link 'I need some help'.

Return to the **Source page** and highlight the 'Export to file' button. The following screen will be displayed.

The screenshot shows the 'CHOOSE EXPORT FORMAT' dialog box. It has a title bar 'CHOOSE EXPORT FORMAT'. The main content area contains the following text: 'Export the current data for the selected Source', 'Please select the format that you wish to export this data:', 'Export as XML' (selected with a radio button), 'Export as CSV' (unselected with a radio button), 'Please Select the Status that you wish to export this data: Either:', 'All' (checked with a checkbox), and 'Or one or more of the following' (unselected with checkboxes). The options under 'Or one or more of the following' are: 'Loaded and validated', 'Amended by source', 'Submitted', 'Amended by agent', 'Approved', 'Amended by collector', and 'Authorised'. At the bottom, there is a blue 'Export' button.


If not already selected, select the **Export as xml option** and then click on the **Export** button. A progress message will be displayed.

EXPORT PROGRESS ...

Export in progress, please wait.... 

Processing Alexandra Infant School (3052001)

Folder	Organisation Name	Native Id	Result
/EstabNo=3052001	Alexandra Infant School	3052001	Data Collected



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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.

When complete the result of the export will be displayed and you will be offered the options of saving or opening the export file. Click on the **Open** button

The security settings on your pc may prevent the '**File Download**' appearing. If this is the case then go into the '**Tools**' menu option at the top of the screen.

Select '**Internet Options**' from the drop down menu.

Select '**Security**' from the option buttons

Selected '**Trusted Sites**'

Select '**Sites**'

The select '**Add**' and type the following into the text box:

<https://collectdata.education.gov.uk>

Then select ok and ok.

Alternatively you could try changing you security settings by

Going into the **Tools** menu option at the top of the screen, Select **Internet Options**, Select **Security**, Click on the **custom level** button, then make sure that **automatic prompting for file downloads** is set to **enabled** (it's a third of the way down the list)

Then trying producing the export again and this time the Open/Save/Cancel dialogue box should appear



Export Results Page

INFORMATION

Export Finished.

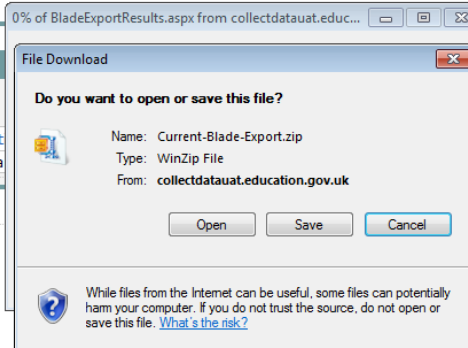
EXPORT RESULTS

Results of export

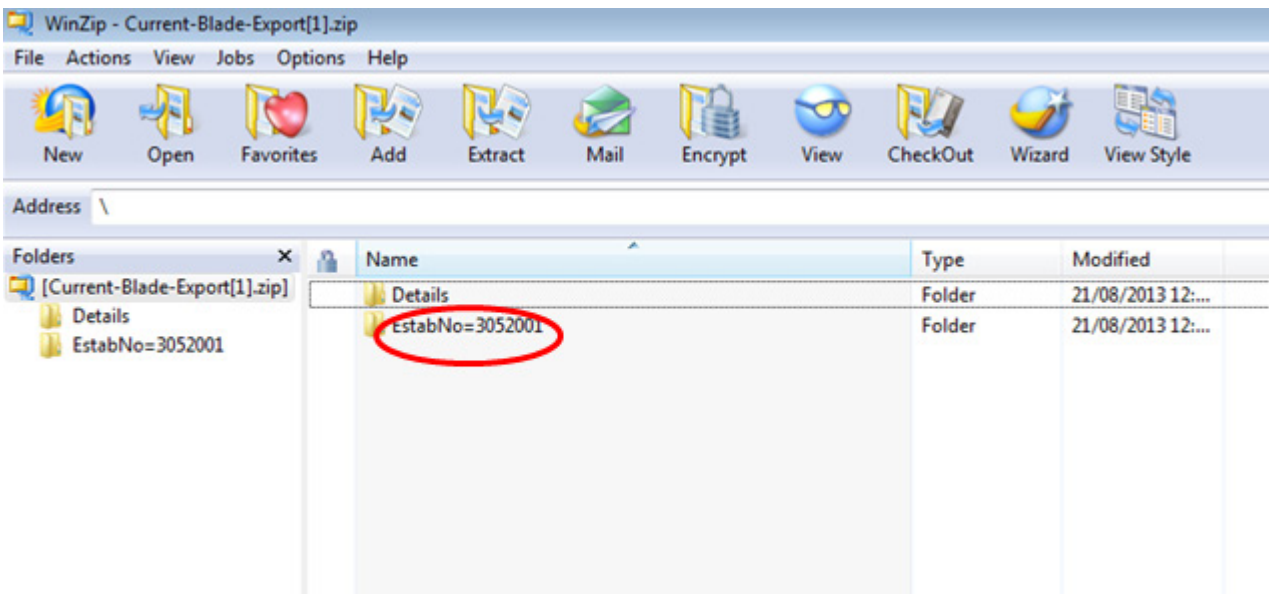
Folder	Organisat
/EstabNo=3052001	Alexandra



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Click on the **Open** button to bring up the file details in Windows Explorer
Double click on the folder '**EstabNo=**' to open it; it contains the exported XML file, which you can double click to display the data.



Exports can also be provided in CSV format. Select 'Export as CSV' and when the **Save** and **Open** options appear click on the **Open** button

File Actions View Jobs Options Help

New Open Favorites Add Extract Mail Encrypt View CheckOut Wizard View Style

Address \

Folders x [Current-Blade-Export(2).zip] Details

Name	Type	Modified	Size	Ratio	Packed
Details	Folder	21/08/2013 12:...			
Blade-Export_21-08-2013_absence.csv	Microsoft Ex...	21/08/2013 12:...	472	40%	282
Blade-Export_21-08-2013_additionalpayment.csv	Microsoft Ex...	21/08/2013 12:...	127	31%	87
Blade-Export_21-08-2013_agencytpsupport.csv	Microsoft Ex...	21/08/2013 12:...	226	27%	166
Blade-Export_21-08-2013_cbdslevels.csv	Microsoft Ex...	21/08/2013 12:...	192	25%	144
Blade-Export_21-08-2013_contractorservice.csv	Microsoft Ex...	21/08/2013 12:...	729	40%	437
Blade-Export_21-08-2013_curriculum.csv	Microsoft Ex...	21/08/2013 12:...	245	24%	185
Blade-Export_21-08-2013_formerfamilyname.csv	Microsoft Ex...	21/08/2013 12:...	120	28%	86
Blade-Export_21-08-2013_givenname.csv	Microsoft Ex...	21/08/2013 12:...	314	30%	220
Blade-Export_21-08-2013_la.csv	Microsoft Ex...	21/08/2013 12:...	94	29%	67
Blade-Export_21-08-2013_occasionals.csv	Microsoft Ex...	21/08/2013 12:...	229	34%	152
Blade-Export_21-08-2013_qualification.csv	Microsoft Ex...	21/08/2013 12:...	359	35%	233
Blade-Export_21-08-2013_role.csv	Microsoft Ex...	21/08/2013 12:...	449	33%	301
Blade-Export_21-08-2013_roleadditionalpayment.csv	Microsoft Ex...	21/08/2013 12:...	228	26%	168
Blade-Export_21-08-2013_school.csv	Microsoft Ex...	21/08/2013 12:...	211	24%	160
Blade-Export_21-08-2013_schoolworkforceannual.csv	Microsoft Ex...	21/08/2013 12:...	224	24%	170
Blade-Export_21-08-2013_schoolworkforcemember.csv	Microsoft Ex...	21/08/2013 12:...	583	40%	350
Blade-Export_21-08-2013_schoolworkforcemodules.csv	Microsoft Ex...	21/08/2013 12:...	306	37%	193
Blade-Export_21-08-2013_source.csv	Microsoft Excel Comma Separated Values File			27%	218
Blade-Export_21-08-2013_subjects.csv	Microsoft Ex...	21/08/2013 12:...	302	40%	181
Blade-Export_21-08-2013_vacancy.csv	Microsoft Ex...	21/08/2013 12:...	259	26%	191

Help

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



Department
for Education

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