

# **SCHOOL WORKFORCE COLLECT User Guide For Schools**

## Introduction

The purpose of this document is to provide School users with sufficient knowledge to enable them to:

- Understand how a return progresses through the COLLECT software from initial loading of data by a School to the submitted stage.
- Use the functionality within COLLECT to manage and monitor the school workforce return for their School.

## Outline

There is a test file which the user can upload into the familiarisation COLLECT system in order to walk through the screens. The file is called **School 2**. This file must be updated using a text editor such as 'NotePad' so the LEA number 007 needs to be changed to your own LEA number and the Estab number changed to your user's Estab number.

The user guide covers the following:-

- Accessing COLLECT
- Loading a return (Schools)
- Navigating through a return
- Editing a return
- Providing supplementary information
- Identifying & correcting errors
- Change history
- Submitting a return

## Accessing COLLECT

Access the collection software by typing in the following URL to access the familiarisation collection:

[https://collectdatauat.education.gov.uk/familiarisation\\_CollectPortal/MainPage.aspx](https://collectdatauat.education.gov.uk/familiarisation_CollectPortal/MainPage.aspx)

and the following URL for the live collection

<https://collectdata.education.gov.uk/COLLECTPortalLive/login.aspx>

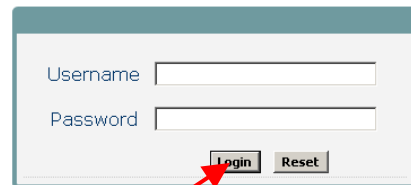
### COLLECT School Workforce Familiarisation Portal

#### Collect Login

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

The School Workforce Spring 2010 Familiarisation Blade will close on Friday 2nd July at 4pm.

If you have any problems logging into COLLECT please contact the Helpdesk on 01325-392626 or e-mail: [DSG.Helpdesk@education.gsi.gov.uk](mailto:DSG.Helpdesk@education.gsi.gov.uk)

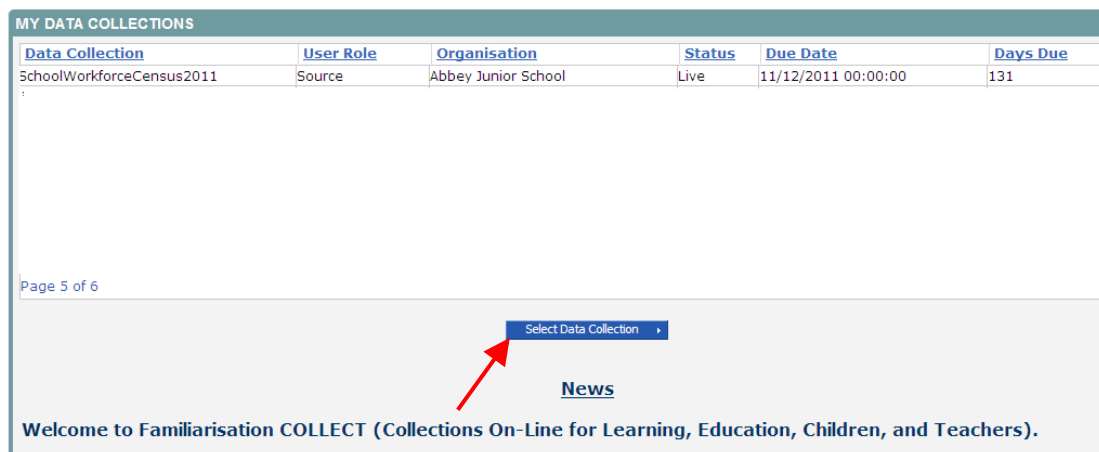


Username

Password

Login into COLLECT using the username and password provided by the helpdesk. Note: Passwords and Usernames are case sensitive!

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.



MY DATA COLLECTIONS

| <a href="#">Data Collection</a> | <a href="#">User Role</a> | <a href="#">Organisation</a> | <a href="#">Status</a> | <a href="#">Due Date</a> | <a href="#">Days Due</a> |
|---------------------------------|---------------------------|------------------------------|------------------------|--------------------------|--------------------------|
| SchoolWorkforceCensus2011       | Source                    | Abbey Junior School          | Live                   | 11/12/2011 00:00:00      | 131                      |

Page 5 of 6

▾

[News](#)

Welcome to Familiarisation COLLECT (Collections On-Line for Learning, Education, Children, and Teachers).

The Source (School) main screen will be displayed

The screen is divided into three main sections:

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

## Return Status

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'

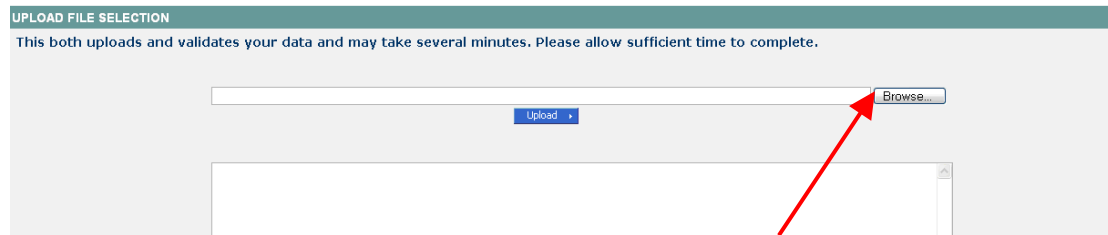
## Return Management

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

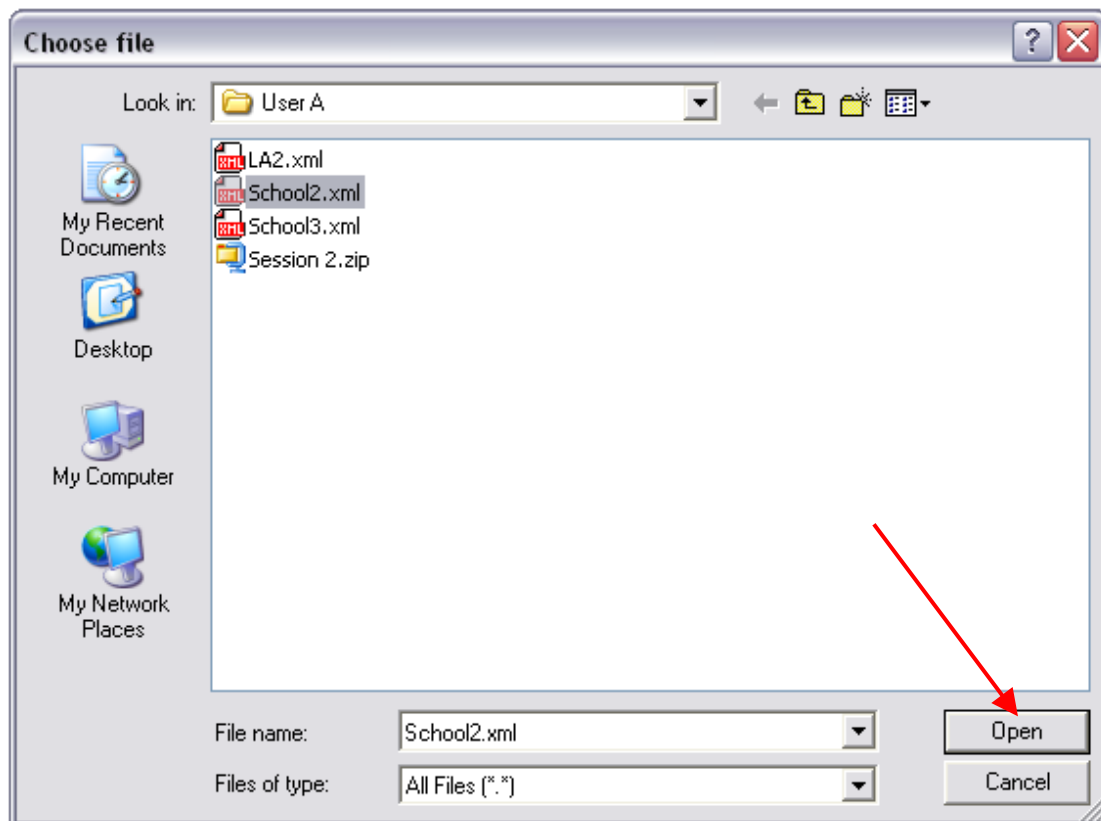
## Loading a Return

Click on the **Upload return from file** button on the previous screen.



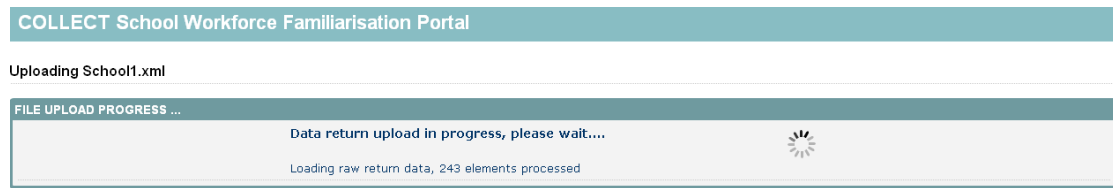
Use the **browse** button to locate the XML file. If you are using the test file then select **School2.xml** which is provided with this guide. Please remember to update the Estab number and LEA numbers first to your own LEA and Estab numbers.

Highlight the file name and click on **Open** to select the return.

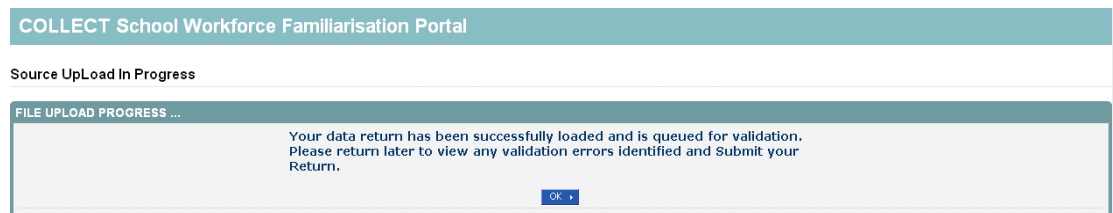


Click on the **Upload** button to load the return.

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

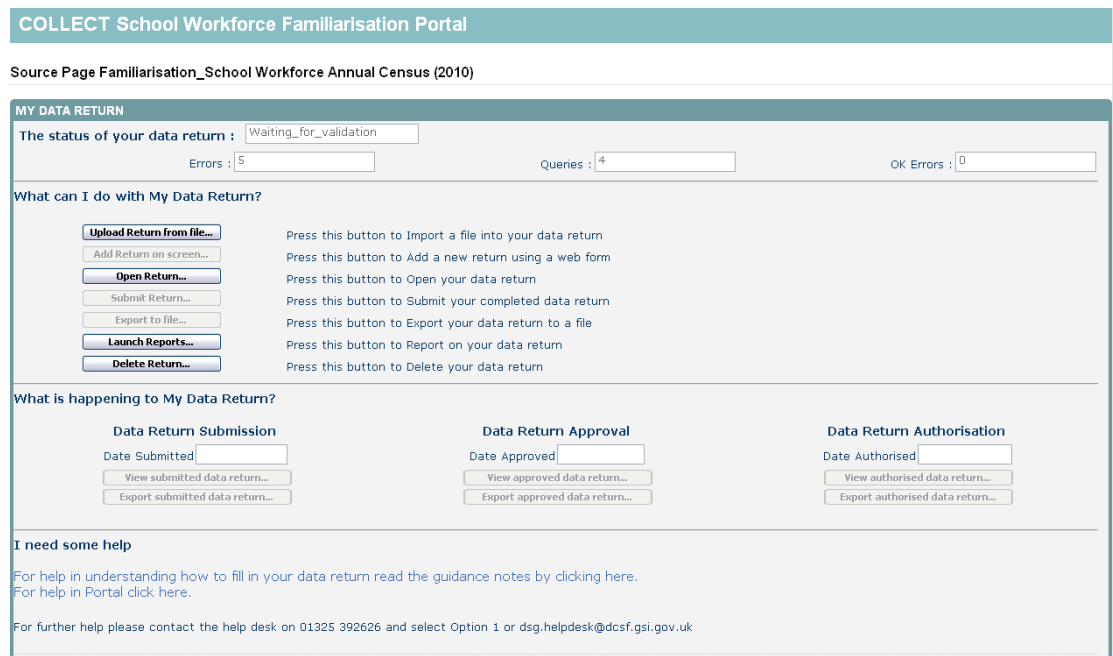


Once the return has been loaded, the following message will be displayed on screen.



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.



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.

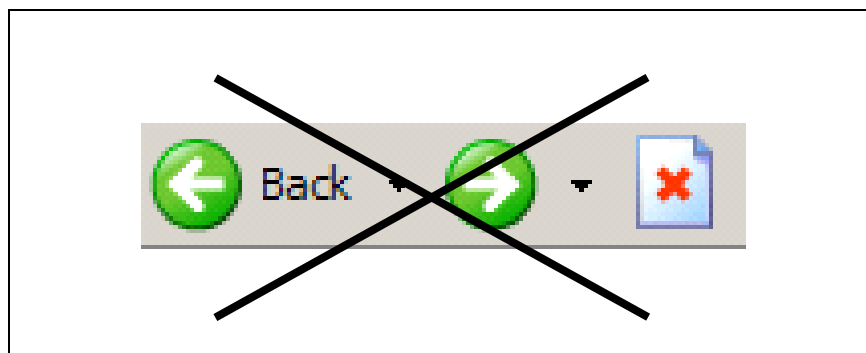
| <div style="text-align: right;"> <input type="button" value="Approve"/> <input type="button" value="All Errors"/> <input type="button" value="All Notes"/> <input type="button" value="Add"/> <input type="button" value="View"/> <input type="button" value="Edit"/> <input type="button" value="Delete"/> </div> |                         |        |         |        |         |                      |                    |
|--|-------------------------|--------|---------|--------|---------|----------------------|--------------------|
| School Workforce Annual Collection(2011) - Alexandra Junior School   |                         |        |         |        |         |                      |                    |
| RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.)  |                         |        |         | Errors | Queries | OK                   | Return Level Notes |
|  |                         |        |         | 0      | 0       | 0                    |                    |
| Data Item  | Value                   | Errors |         |        | Notes   |                      |                    |
|  |                         | Errors | Queries | OK     |         |                      |                    |
| HEADER INFORMATION   |                         |        |         |        |         |                      |                    |
| Collection   | School Workforce Census | 0      | 0       | 0      |         |                      |                    |
| Year   | 2011                    | 0      | 0       | 0      |         |                      |                    |
| Reference Date   | 2011-11-03              | 1      | 0       | 0      |         |                      |                    |
| View Source Details  |                         |        |         |        |         | <a href="#">View</a> |                    |

### Screen Functionality

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

### Screen Navigation

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



### Navigation controls

To navigate through the system links are provided on all pages either as **Back** or **Drill Up** options, please use these links to navigate between screens when using the system.

| Control | Usually located | Action |
|---------|-----------------|--------|
|---------|-----------------|--------|

|  |  |   |
|--|--|---|
| <a href="#">Back to MyCOLLECT page</a> | 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) |
| <a href="#">Drill Up</a>               | Any data screen within a return apart from the header screen   | Returns you to the previous data screen                             |
| <a href="#">Return</a>                 | Report screens, e.g. History and errors  | Returns you to the previous screen                                  |
| <a href="#">Back</a>                   | Notes screens  | Returns you to the previous screen                                  |
| <a href="#">View All</a>               | Data entry screens that have additional linked data, e.g. accesses contract details for a workforce member | Takes you to the sub module level details                           |

### Mode Buttons

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



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

### Filter Bars

|               |                      |        |                      |        |                      |         |                      |        |                      |        |                      |                                      |                                   |
|---------------|----------------------|--------|----------------------|--------|----------------------|---------|----------------------|--------|----------------------|--------|----------------------|--------------------------------------|-----------------------------------|
| FilterTeacher | <input type="text"/> | Family | <input type="text"/> | Gender | <input type="text"/> | Date of | <input type="text"/> | QT     | <input type="text"/> | Status | <input type="text"/> | <input type="button" value="Reset"/> | <input type="button" value="Go"/> |
| By: Number    |                      | Name   |                      |        |                      | Birth   |                      | Status |                      |        |                      |                                      |                                   |

Only available on screens that could have a large record set e.g. Workforce Member. Allows criteria to be entered to identify a group of related records or a single record. For example if the user type a name in the 'Family Name' box and selects the 'Go' button then only workforce members with that family name will be displayed in the record list. This enables the user to go to specific records rather than having to page through all the records.

### Record List

| Teacher Number | Name            | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|-----------------|--------|---------------|-----------|-------------|
| 0777123        | Davis, Steve    | Male   | 1955-09-17    | Yes       | 1           |
| 0755123        | Bunter, William | Male   | 1955-09-17    | Yes       | 1           |
| 0766123        | Miller, Susan   | Female | 1955-09-17    | Yes       | 2           |

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.

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

## Record Details

| Data Item                       | Value                                      | Errors |         |    | Notes | History                  |
|---------------------------------|--|--------|---------|----|-------|--------------------------|
|                                 |  | Errors | Queries | OK |       |                          |
| WORKFORCE MEMBER                |  |        |         |    |       |                          |
| <b>Staff Details</b>            |  |        |         |    |       |                          |
| Teacher Number                  | D777123                                    | 0      | 0       | 0  |       |                          |
| Family Name                     | Davis                                      | 0      | 0       | 0  |       |                          |
| <b>Given Name</b>               |  |        |         |    |       |                          |
| Steve                           |  |        |         |    |       |                          |
| View Given Name(s)              |  |        |         |    |       | <a href="#">View All</a> |
| <b>Former Family Name</b>       |  |        |         |    |       |                          |
| View Former Family Name(S)      |  |        |         |    |       | <a href="#">View All</a> |
| NI Number                       | GB771234A                                  | 0      | 1       | 0  |       |                          |
| Gender                          | Male                                       | 0      | 0       | 0  |       |                          |
| Date of Birth                   | 1955-09-17                                 | 0      | 0       | 0  |       |                          |
| Ethnic Code                     | Any Other White Background                 | 0      | 0       | 0  |       |                          |
| Disability                      | No   | 0      | 0       | 0  |       |                          |
| QT Status                       | Yes  | 0      | 0       | 0  |       |                          |
| HLTA Status                     | False                                      | 0      | 0       | 0  |       |                          |
| QTS Route                       | Annual College Exit - Post Graduate Course | 0      | 0       | 0  |       |                          |
| View Contract/Agreement Details |  |        |         |    |       | <a href="#">View All</a> |
| View Absence Details            |  |        |         |    |       | <a href="#">View All</a> |
| View Curriculum Details         |  |        |         |    |       | <a href="#">View All</a> |
| View Qualification Details      |  |        |         |    |       | <a href="#">View All</a> |

## Breadcrumb Trail

> 0002,017,S > Davis,GB771234A,17/09/1955

Displayed when you navigate to sub/child modules. Contains identifiers to show which record you are in. Trail expands to include additional details the further down you drill. Each level is separated by a ">". The above example shows the breadcrumb trail displayed in an absence sub module, the first level shows the source identifiers 'Etab number', 'LA Number' and 'Source Level'; the second level shows the workforce-member identifiers 'Person Family Name', 'NI Number' and 'Date of Birth'. Please note this 'breadcrumb trail' is not always displayed if the user has used the left hand menu rather than the drilling down buttons.

## 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.

COLLECT School Workforce Familiarisation Portal

Source

All Errors All Notes Add View Edit Delete Status

Drill Up Error

Source - SWF Training School 2

| LA  | Estab | Source Level | Software Code | Rule Errors |
|-----|-------|--------------|---------------|-------------|
| 017 | 0002  | School       | TEST          | 3           |

| Data Item     | Value               | Errors | Queries | OK | Notes | History |
|---------------|---------------------|--------|---------|----|-------|---------|
| SOURCE        |                     | 0      | 0       | 0  |       |         |
| Source Level  | School              | 0      | 0       | 0  |       |         |
| LA            | 017                 | 2      | 0       | 0  |       |         |
| Estab         | 0002                | 1      | 0       | 0  |       |         |
| Software Code | TEST                | 0      | 0       | 0  |       |         |
| Release       |                     | 0      | 0       | 0  |       |         |
| Serial No     | 1                   | 0      | 0       | 0  |       |         |
| DateTime      | 2010-05-25 14:35:05 | 0      | 0       | 0  |       |         |

View CBDS Levels View All  
View School Workforce Members View All  
View School Details View All  
View LA Details View All

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

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

COLLECT School Workforce Familiarisation Portal

School Workforce Member

All Errors All Notes Add View Edit Delete Status

> 0002,017,S

Drill Up Error

School Workforce Member - SWF Training School 2

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

| Teacher Number | Name            | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|-----------------|--------|---------------|-----------|-------------|
| 0777123        | Davis, Steve    | Male   | 1955-09-17    | Yes       | 1           |
| 0755123        | Bunter, William | Male   | 1955-09-17    | Yes       | 1           |
| 0766123        | Miller, Susan   | Female | 1955-09-17    | Yes       | 2           |

Only three staff altogether in this test school.

| Data Item                  | Value                                      | Errors | Queries | OK | Notes | History  |
|----------------------------|--|--------|---------|----|-------|----------|
| WORKFORCE MEMBER           |  | 0      | 0       | 0  |       |          |
| Staff Details              |  | 0      | 0       | 0  |       |          |
| Teacher Number             | 0777123                                    |        |         |    |       |          |
| Family Name                | Davis                                      |        |         |    |       |          |
| Given Name                 | Steve                                      |        |         |    |       |          |
| View Given Name(s)         |  |        |         |    |       | View All |
| Former Family Name         |  |        |         |    |       |          |
| View Former Family Name(s) |  |        |         |    |       | View All |
| NI Number                  | GB71234A                                   | 1      | 0       | 0  |       |          |
| Gender                     | Male                                       | 0      | 0       | 0  |       |          |
| Date of Birth              | 1955-09-17                                 | 0      | 0       | 0  |       |          |
| Ethnic Code                | Any Other White Background                 | 0      | 0       | 0  |       |          |
| Disability                 | No   | 0      | 0       | 0  |       |          |
| QT Status                  | Yes  | 0      | 0       | 0  |       |          |
| HLTA Status                | False                                      | 0      | 0       | 0  |       |          |
| QTS Route                  | Annual College Exit - Post 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

Sort the record set by given name by clicking on the 'Name' column in the 'Record List' section.

COLLECT School Workforce Familiarisation Portal

School Workforce Member

All Errors All Notes Add View Edit Delete Status

> 0002,017,S

School Workforce Annual Collection(2010)

Source [3]

School Workforce Member [4]

Given Name

Former Family Name

Contract or Service [2]

Additional Payment

Role [1]

Additional Payment

Absence

Curriculum

Qualification

Subjects

School

School Workforce Member - SWF Training School 2

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 |
|----------------|----------------|--------|---------------|-----------|-------------|
| 0755123        | Bunter,William | Male   | 1955-09-17    | Yes       | 1           |
| 0777123        | Davis,Steve    | Male   | 1955-08-17    | Yes       | 1           |
| 0786123        | Miller,Susan   | Female | 1955-09-17    | Yes       | 2           |

| Data Item        | Value   | Errors |         |    | Notes | History |
|------------------|---------|--------|---------|----|-------|---------|
|                  |         | Errors | Queries | OK |       |         |
| WORKFORCE MEMBER |         |        |         |    |       |         |
| Staff Details    |         |        |         |    |       |         |
| Teacher Number   | 0755123 | 0      | 0       | 0  |       |         |
| Family Name      | Bunter  | 0      | 0       | 0  |       |         |
| Given Name       |         |        |         |    |       |         |

Now filter the recordset by typing "Miller" in the 'Family Name' box in the 'Filter Section' and then click on the **Go** button. The record details for Susan Miller should be displayed on screen.

COLLECT School Workforce Familiarisation Portal

School Workforce Member

All Errors All Notes Add View Edit Delete Status

> 0002,017,S

School Workforce Annual Collection(2010)

Source [3]

School Workforce Member [4]

Given Name

Former Family Name

Contract or Service [2]

Additional Payment

Role [1]

Additional Payment

Absence

Curriculum

Qualification

School

School Workforce Member - SWF Training School 2

Drill Up Error

All Notes

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

| Teacher Number | Name         | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|--------------|--------|---------------|-----------|-------------|
| 0766123        | Miller,Susan | Female | 1955-09-17    | Yes       | 2           |

| Data Item        | Value   | Errors |         |    | Notes | History |
|------------------|---------|--------|---------|----|-------|---------|
|                  |         | Errors | Queries | OK |       |         |
| WORKFORCE MEMBER |         |        |         |    |       |         |
| Staff Details    |         |        |         |    |       |         |
| Teacher Number   | 0766123 | 0      | 0       | 0  |       |         |
| Family Name      | Miller  | 0      | 0       | 0  |       |         |
| Given Name       |         |        |         |    |       |         |

## 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. The details for the workforce member will now be available to edit.

COLLECT School Workforce Familiarisation Portal

School Workforce Member

All Errors All Notes Add View Edit Delete Status

> 0002,017,S

School Workforce Annual Collection(2016)

Source [3]

CBDS Levels

School Workforce Member [4]

Given Name

Former Family Name

Contract or Service [2]

Additional Payment

Role [1]

Additional Payment

Absence

Curriculum

Qualification

Subjects

School

School Workforce Member - SWF Training School 2

Drill Up Error

All Notes

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

| Teacher Number | Name            | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|-----------------|--------|---------------|-----------|-------------|
| 0777123        | Davis, Steve    | Male   | 1955-09-17    | Yes       | 1           |
| 0755123        | Bunter, William | Male   | 1955-09-17    | Yes       | 1           |
| 0766123        | Miller, Susan   | Female | 1955-09-17    | Yes       | 2           |

| Data Item        | Value   | Errors | Queries | OK | Notes | History |
|------------------|---------|--------|---------|----|-------|---------|
| WORKFORCE MEMBER |         |        |         |    |       |         |
| Staff Details    |         |        |         |    |       |         |
| Teacher Number   | 0766123 | 0      | 0       | 0  |       |         |
| Family Name      | Miller  | 0      | 0       | 0  |       |         |
| Given Name       |         |        |         |    |       |         |

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

COLLECT School Workforce Familiarisation Portal

School Workforce Member

All Errors All Notes Add View Edit Delete Status

> 0002,017,S

School Workforce Annual Collection(2016)

Source [3]

CBDS Levels

School Workforce Member [4]

Given Name

Former Family Name

Contract or Service [2]

Additional Payment

Role [1]

Additional Payment

Absence

Curriculum

Qualification

Subjects

School

Vacancy

Occasionals

Agency TP Support Count

LA

School Workforce Member - SWF Training School 2

Drill Up Error

All Notes

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

| Teacher Number | Name            | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|-----------------|--------|---------------|-----------|-------------|
| 0777123        | Davis, Steve    | Male   | 1955-09-17    | Yes       | 1           |
| 0755123        | Bunter, William | Male   | 1955-09-17    | Yes       | 1           |
| 0766123        | Miller, Susan   | Female | 1955-09-17    | Yes       | 2           |

| Data Item                                | Value  | Errors | Queries | OK | Notes | History |
|--|--|--------|---------|----|-------|---------|
| WORKFORCE MEMBER                         |  |        |         |    |       |         |
| Staff Details                            |  |        |         |    |       |         |
| Teacher Number                           | 0766123  | 0      | 0       | 0  |       |         |
| Family Name                              | Miller   | 0      | 0       | 0  |       |         |
| Given Name                               | Susan  |        |         |    |       |         |
| View Given Name(s) View All              |  |        |         |    |       |         |
| Former Family Name                       |  |        |         |    |       |         |
| View Former Family Name(s) View All      |  |        |         |    |       |         |
| NI Number                                |  | 0      | 1       | 0  |       |         |
| Gender                                   | Annual College Exit - Graduate Course          | 0      | 0       | 0  |       |         |
| Date of Birth                            | Annual College Exit - Post Graduate Course     | 0      | 0       | 0  |       |         |
| Ethnic Code                              | Overseas Trained Teacher Programme             | 0      | 0       | 0  |       |         |
| Disability                               | Registered Teacher Programme                   | 0      | 0       | 0  |       |         |
| QT Status                                | Graduate Teacher Programme                     | 0      | 0       | 0  |       |         |
| HLTA Status                              | Teach First Programme                          | 0      | 0       | 0  |       |         |
| QTS Route                                | Mutual Recognition from NI, Scotland or the EU | 0      | 0       | 0  |       |         |
|  | Flexible Routes                                | 0      | 0       | 0  |       |         |
|  | Blank value allowed                            | 0      | 0       | 0  |       |         |
| View Contract Agreement Details View All |  |        |         |    |       |         |
| View Absence Details View All            |  |        |         |    |       |         |
| View Curriculum Details View All         |  |        |         |    |       |         |

Select **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.

School Workforce Member

> 0002,017,8

School Workforce Member - SWF Training School 2

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

| Teacher Number | Name            | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|-----------------|--------|---------------|-----------|-------------|
| 0777123        | Davis, Steve    | Male   | 1955-09-17    | Yes       | 1           |
| 0755123        | Bunter, William | Male   | 1955-09-17    | Yes       | 1           |
| 0766123        | Miller, Susan   | Female | 1955-09-17    | Yes       | 2           |

| Data Item                              | Value                                 | Errors | Queries | OK | Notes | History |
|--|---------------------------------------|--------|---------|----|-------|---------|
| <b>WORKFORCE MEMBER</b>                |                                       |        |         |    |       |         |
| <b>Staff Details</b>                   |                                       |        |         |    |       |         |
| Teacher Number                         | 0766123                               | 0      | 0       | 0  |       |         |
| Family Name                            | Miller                                | 0      | 0       | 0  |       |         |
| <b>Given Name</b>                      |                                       |        |         |    |       |         |
| Susan                                  |                                       |        |         |    |       |         |
| <b>Former Family Name</b>              |                                       |        |         |    |       |         |
| <b>View Former Family Name(S)</b>      |                                       |        |         |    |       |         |
| NI Number                              | GB661234A                             | 0      | 1       | 0  |       |         |
| Gender                                 | Female                                | 0      | 0       | 0  |       |         |
| Date of Birth                          | 1955-09-17                            | 0      | 0       | 0  |       |         |
| Ethnic Code                            | Any Other White Background            | 0      | 0       | 0  |       |         |
| Disability                             | Refused                               | 0      | 0       | 0  |       |         |
| QT Status                              | Yes                                   | 0      | 0       | 0  |       |         |
| HLTA Status                            | False                                 | 1      | 0       | 0  |       |         |
| QTS Route                              | Annual College Exit - Graduate Course | 0      | 0       | 0  |       |         |
| <b>View Contract/Agreement Details</b> |                                       |        |         |    |       |         |
| <b>View Absence Details</b>            |                                       |        |         |    |       |         |
| <b>View Curriculum Details</b>         |                                       |        |         |    |       |         |

### History/Audit Trail

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

COLLECT School Workforce Familiarisation Portal

Data Log Page

History Report - Familiarisation - School Workforce Annual Census (2010)

SWF Training School 2  
History report on 25/05/2010 at 16:19:58  
Data QTS Route

Filter By: Action User Start Date End Date

| Action | Old Value                             | New Value | User                   | Role   | Organisation      | Date                |
|--------|---------------------------------------|-----------|------------------------|--------|-------------------|---------------------|
| Update | Annual College Exit - Graduate Course |           | SWF Training School 2a | Source | SWF Training LA 2 | 25/05/2010 16:19:53 |

## 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.

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 two levels of Notes, one at return level and one at field level. A Return level note should be used when the error/ query is at return level e.g. 'All 70 plus year old workforce members in this return have been checked and they are valid'. Field level notes should be used when a specific data item on a record has an error or query on it e.g. 'this newly qualified teacher does not have a Teacher number allocated to them yet'

**Please Note: If a return is re-uploaded then return level notes are retained but field level notes are deleted.**

Return to the Workforce Member screen for "Susan Miller" by clicking on **Back** and click on the 'pen' icon in the 'Notes' Column for the data item 'NI Number'.

|   |                                       |   |   |   |   |
|---|---------------------------------------|---|---|---|---|
| NI Number                                       | GB661234A                             | 0 | 1 | 0 |  |
| Gender  | Female                                | 0 | 0 | 0 |  |
| Date of Birth                                   | 1955-09-17                            | 0 | 0 | 0 |  |
| Ethnic Code                                     | Any Other White Background            | 0 | 0 | 0 |  |
| Disability                                      | Refused                               | 0 | 0 | 0 |  |
| QT Status                                       | Yes                                   | 0 | 0 | 0 |  |
| HLTA Status                                     | False                                 | 1 | 0 | 0 |  |
| QTS Route                                       | Annual College Exit - Graduate Course | 0 | 0 | 0 |  |
| <a href="#">View Contract/Agreement Details</a> |                                       |   |   |   | <a href="#">View All</a>  |
| <a href="#">View Absence Details</a>            |                                       |   |   |   | <a href="#">View All</a>  |
| <a href="#">View Curriculum Details</a>         |                                       |   |   |   | <a href="#">View All</a>  |
| <a href="#">View Qualification Details</a>      |                                       |   |   |   | <a href="#">View All</a>  |


The following screen should be displayed.

COLLECT School Workforce Familiarisation Portal

Note Page

---

Data Item: NI Number

| User   | Role | Organisation | Native ID | Date and Time |
|--|------|--------------|-----------|---------------|
|  Add New Note |      |              |           |               |

Note Detail

Click on the **Add New Note** Button'

Note Page

Create New Note

Type in “This temporary NI Number cannot be resolved at this stage” and then click on the **Create** button.

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

Note Page

---

Data Item: NI Number

| User                | Role   | Organisation      | Native ID | Date and Time       |
|---------------------|--------|-------------------|-----------|---------------------|
| SWFTrainingSchool2a | Source | SWF Training LA 2 | 017       | 25/05/2010 16:25:42 |

Note Detail

This temporary NI Number cannot be resolved at this stage

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 Member - SWF Training School 2

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

| Teacher Number | Name            | Gender | Date of Birth | QT Status | Rule Errors |
|----------------|-----------------|--------|---------------|-----------|-------------|
| 0777123        | Davis, Steve    | Male   | 1955-09-17    | Yes       | 1           |
| 0755123        | Bunter, William | Male   | 1955-09-17    | Yes       | 1           |
| 0766123        | Miller, Susan   | Female | 1955-09-17    | Yes       | 2           |

| Data Item                                  | Value      | Errors |         |    | Notes | His |
|--|------------|--------|---------|----|-------|-----|
|  |            | Errors | Queries | OK |       |     |
| WORKFORCE MEMBER                           |            |        |         |    |       |     |
| <b>Staff Details</b>                       |            |        |         |    |       |     |
| Teacher Number                             | 0766123    | 0      | 0       | 0  |       |     |
| Family Name                                | Miller     | 0      | 0       | 0  |       |     |
| <b>Given Name</b>                          |            |        |         |    |       |     |
| Susan                                      |            |        |         |    |       |     |
| <a href="#">View Given Name(s)</a>         |            |        |         |    |       |     |
| <b>Former Family Name</b>                  |            |        |         |    |       |     |
| <a href="#">View Former Family Name(S)</a> |            |        |         |    |       |     |
| NI Number                                  | GB661234A  | 0      | 1       | 0  |       |     |
| Gender                                     | Female     | 0      | 0       | 0  |       |     |
| Date of Birth                              | 1955-09-17 | 0      | 0       | 0  |       |     |

## 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 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 (see page 5).

### 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

| RETURN LEVEL ERRORS (Errors and queries associated with this full return, not individual fields.) |                         | Errors | Queries | OK | Return Level Notes       |     |
|---|-------------------------|--------|---------|----|--------------------------|-----|
|   |                         | 0      | 0       | 0  |                          |     |
| Data Item   | Value                   | Errors | Queries | OK | Notes                    | His |
| HEADER INFORMATION  |                         |        |         |    |                          |     |
| Collection  | School Workforce Census | 0      | 0       | 0  |                          |     |
| Term  | AUT                     | 0      | 0       | 0  |                          |     |
| Year  | 2010                    | 0      | 0       | 0  |                          |     |
| Reference Date  | 2010-11-04              | 1      | 0       | 0  |                          |     |
| <a href="#">View Source Details</a>   |                         |        |         |    | <a href="#">View All</a> |     |

### 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 for “Davis”, 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.

| Absence - SWF Training School 2 |            |            |            |                  |             | Drill Up  | Error |
|---------------------------------|------------|------------|------------|------------------|-------------|-----------|-------|
|                                 |            |            |            |                  |             | All Notes |       |
| Name                            | NI Number  | First Day  | Last Day   | Absence Category | Rule Errors |           |       |
| Steve Davis                     | GB771234A  | 2009-11-26 | 2009-11-25 | Sickness         | 1           |           |       |
| Data Item                       | Value      |            |            | Errors           |             |           | Notes |
| ABSENCE                         |            |            |            | Errors           | Queries     | OK        |       |
| First Day                       | 2009-11-26 |            |            | 1                | 0           | 0         |       |
| Last Day                        | 2009-11-25 |            |            | 1                | 0           | 0         |       |
| Working Days Lost               | 1.0        |            |            | 0                | 0           | 0         |       |
| Absence Category                | Sickness   |            |            | 0                | 0           | 0         |       |
| Estab                           | 0002       |            |            | 0                | 0           | 0         |       |

**Error 'Flags'**

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.

| SWF Training School 2 |   | Error report on 26/05/2010 at 09:36 |               |
|-----------------------|---|-------------------------------------|---------------|
| Data Field            | LastDayOfAbsence  | Priority                            | Errors        |
| Count                 | 1   | Rule No.                            | Error Message |
| 4940                  | Last Day of absence cannot be before First Day of absence | Details                             |               |
| Page 1 of 1           |   |                                     | 1             |
| Count                 | 0   | Rule No.                            | Error Message |
| 0                     |   |                                     | 1             |
| Count                 | 0   | Rule No.                            | Error Message |
| 0                     |   |                                     | 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.

| SWF Training School 2 |   | Error report on 26/05/2010 at 09:37 |                     | Return  |  |
|-----------------------|---|-------------------------------------|---------------------|---------|--|
| Data Field            | LastDayOfAbsence  | Priority                            | Errors              | Details |  |
| Count                 | 1   | Field                               | Value               |         |  |
| 4940                  | Last Day of absence cannot be before First Day of absence | First Day                           | Nov 26 2009 12:00AM |         |  |
| Page 1 of 1           |   | Last Day                            | Nov 25 2009 12:00AM |         |  |
| 1                     |   |                                     |                     |         |  |
| Count                 | 0   | Rule No.                            | Error Message       |         |  |
| 0                     |   |                                     | 1                   |         |  |
| Count                 | 0   | Rule No.                            | Error Message       |         |  |
| 0                     |   |                                     | 1                   |         |  |

**Click directly on the item with the wrong value**

The 'First Day' and 'Last Day' and their data values are both displayed as it is equally possible that either of the two values is wrong.

## 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. For this example we will change the 'Last Day' to "2011-10-27". Once amended press the 'Return/Enter' key or click into another field on screen. The value will be changed and the errors for the First and Last Day items will be removed, a history record will be stored against the 'Last Day' item.

COLLECT School Workforce Familiarisation Portal

Absence

> 0002,017,S > Davis,GB771234A,17/09/1955

All Errors All Notes Add View Edit Delete Status

School Workforce Annual Collection(2011)

Source [3]

CBDS Levels

School Workforce Member [4]

- Given Name
- Former Family Name
- Contract or Service [2]
- Additional Payment
- Role [1]
- Additional Payment
- Absence
- Curriculum
- Qualification
- Subjects

Absence - SWF Training School 2

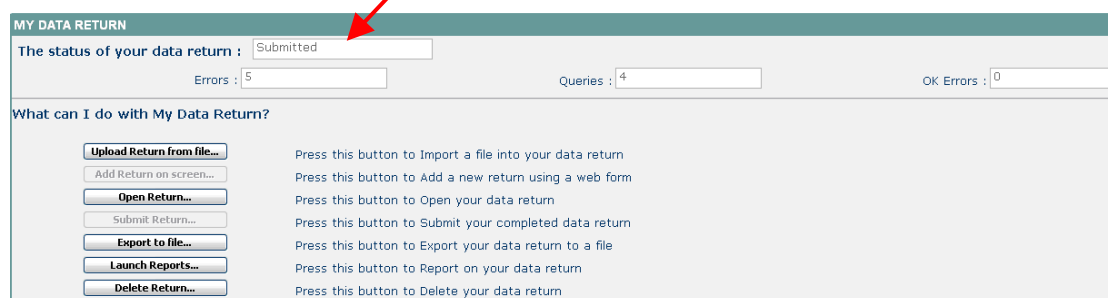
| Name        | NI Number | First Day  | Last Day   | Absence Category | Rule Errors |
|-------------|-----------|------------|------------|------------------|-------------|
| Steve Davis | GB771234A | 2009-11-26 | 2009-11-27 | Sickness         | 0           |

| Data Item         | Value      | Errors |         |    | Notes | History |
|-------------------|------------|--------|---------|----|-------|---------|
|                   |            | Errors | Queries | OK |       |         |
| ABSENCE           |            |        |         |    |       |         |
| First Day         | 2009-11-26 | 0      | 0       | 0  |       |         |
| Last Day          | 2009-11-27 | 0      | 0       | 0  |       |         |
| Working Days Lost | 1.0        | 0      | 0       | 0  |       |         |
| Absence Category  | Sickness   | 0      | 0       | 0  |       |         |
| Etab              | 0002       | 0      | 0       | 0  |       |         |

## Submitting the 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'.



MY DATA RETURN

The status of your data return : Submitted

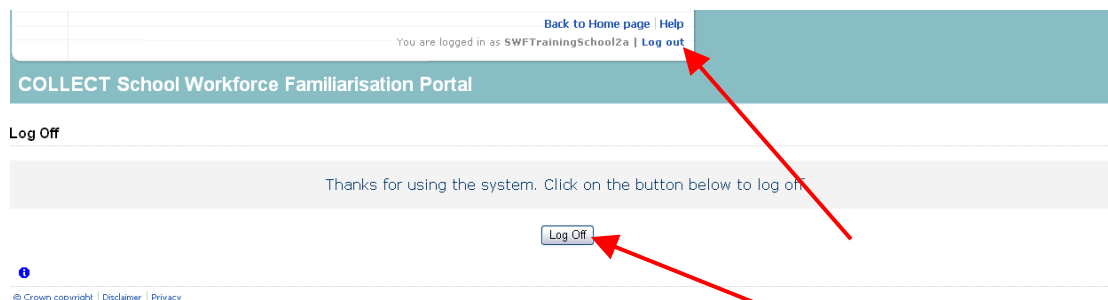
Errors : 5      Queries : 4      OK Errors : 0

What can I do with My Data Return?

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

## Logging out of COLLECT

Log out of COLLECT by clicking on 'Log out' and then click the 'Log Off' button.



Back to Home page | Help

You are logged in as SWFTTrainingSchool2a | [Log out](#)

COLLECT School Workforce Familiarisation Portal

Log Off

Thanks for using the system. Click on the button below to log off.

[Log Off](#)

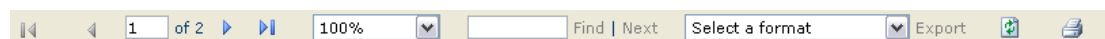
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## Reports

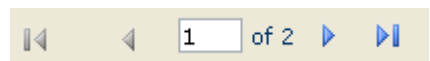
A number of reports are available on COLLECT, return to the **Source page** by selecting **Back to My Collect page** at the top of the page and click on the **Launch Reports** button. A drop down menu will be display and a report can be selected from that drop down list. The following reports are available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

- **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.

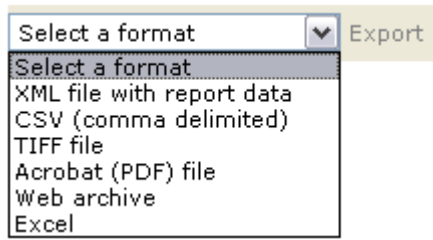


These are explained as follows.


 Allows you to navigate between pages of the report.


 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

## Exporting a return

A return can be exported in xml or csv format

### Exporting a return (Current state)

Return to the **Source page** and highlight the 'Export to file' button.

The following screen will be displayed.

**CHOOSE EXPORT FORMAT**

**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   
Amended by source   
Submitted   
Amended by agent   
Approved   
Amended by collector   
Authorised

Export

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

**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.

You are logged in as SWFTrainingLA2a |

**COLLECT Portal Familiarisation Site**

Exporting (Processed 0 of 1)

**EXPORT PROGRESS ...**

Export in progress, please wait...

Processing SWF Training School 2 (0170002)

| Folder | Organisation Name | Native Id | Result |
|--------|-------------------|-----------|--------|
|--------|-------------------|-----------|--------|

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.

**COLLECT School Workforce Familiarisation Portal**

Export Results Page

**INFORMATION**  
Export Finished.

**EXPORT RESULTS**

Results of export

| Folder           | Organisation Name     | Native Id | Result      |
|------------------|-----------------------|-----------|-------------|
| /EstabNo=0170002 | SWF Training School 2 | 0170002   | Exported OK |

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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

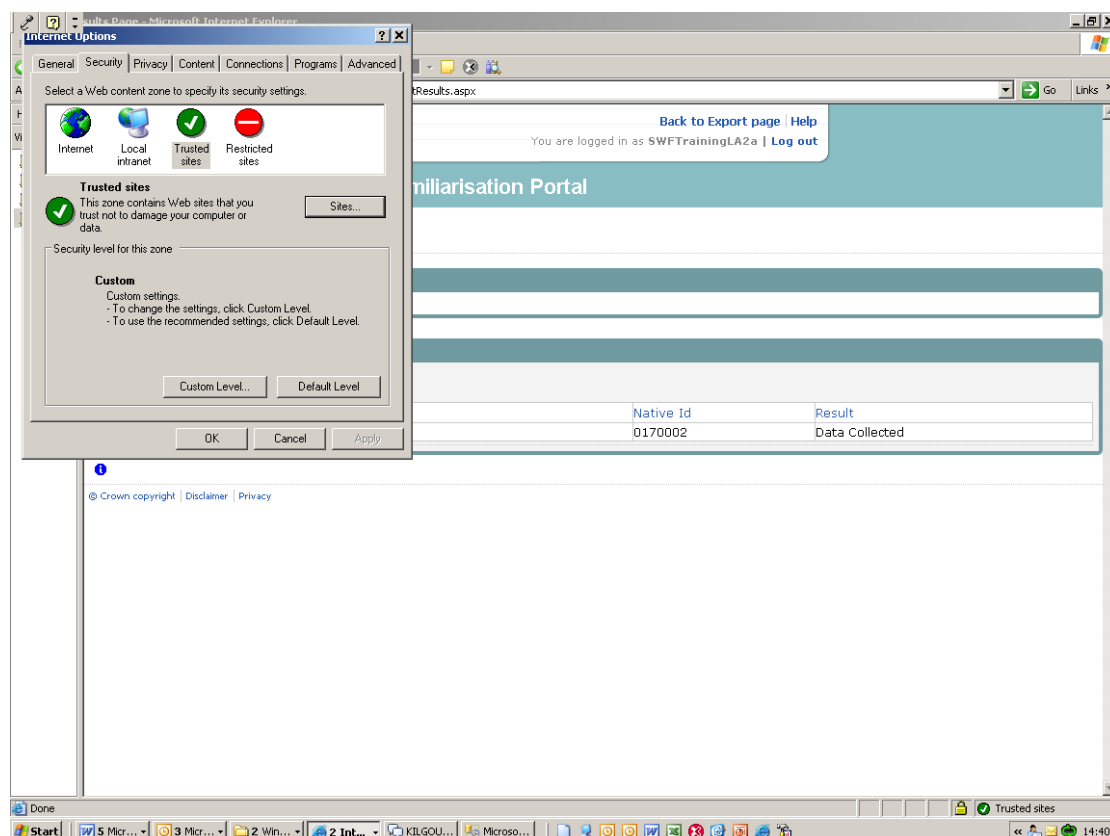
Selected **'Trusted Sites'**

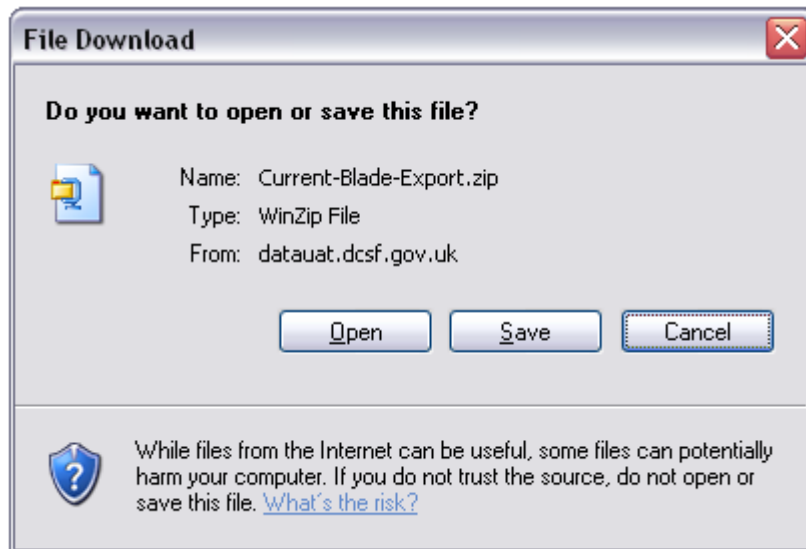
Select **'Sites'**

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

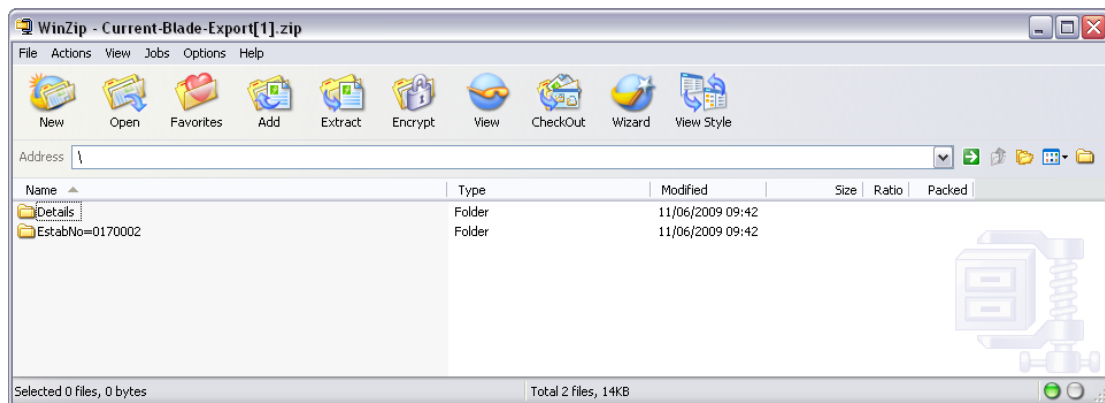
https://collectdata.education.gov.uk

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



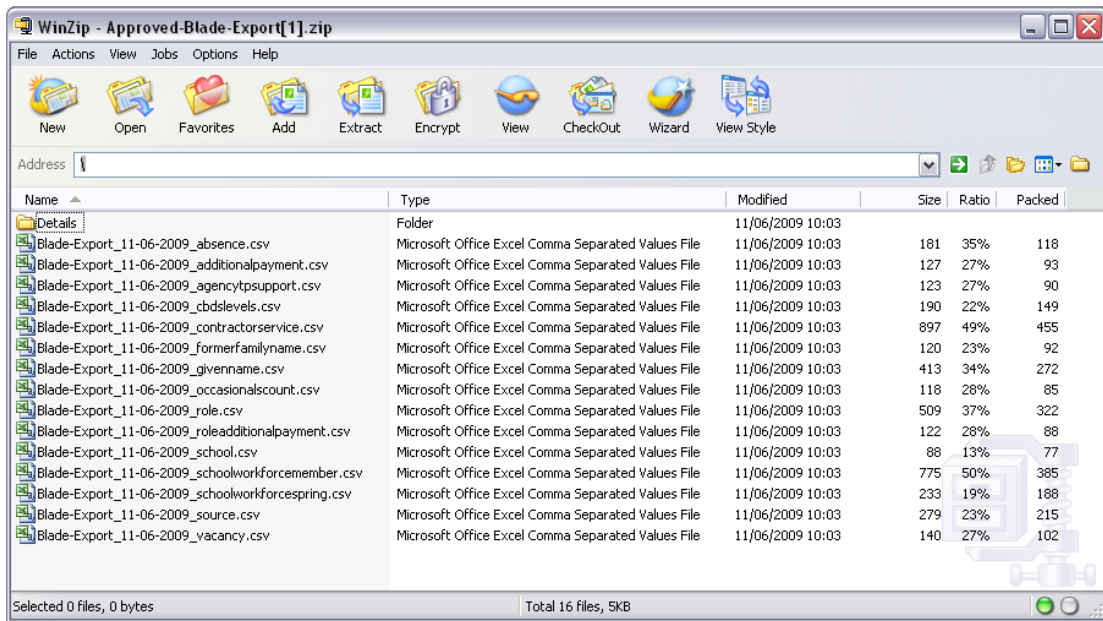


Click on the **Open** button to bring up the file details in Windows Explorer:



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.



You will see that for csv exports a separate file will be created for each module and sub module within the return.