

Compass+ Bitesize - Bulk Activities and Partner uploads transcript

0:04

OK, good afternoon everyone.

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We'll make a start there now.

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We were just waiting for a few more of the registered participants to come onto the webinar today.

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So just to point out before we do get started that today's session is being recorded.

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So for anybody that has registered, if you do know of anybody that's registered that hasn't been able to make it on that it is being recorded.

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And so they will get still get a copy of the recording in the post session comms after we have finished.

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So good afternoon and welcome to our Compass+ Bitesize webinar around bulk activities and partner uploads.

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My name is Peter McKinney, I am a Compass+ trainer for CEC and I lead on our virtual delivery programme and also support on the face to face delivery as well.

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Joining me this afternoon, I've got Tahmid from the customer service team.

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Tahmid, would you like to just jump on and say hello?

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Good afternoon everyone.

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My name is Tahmid.

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I'm a part of the customer service advising team.

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If you guys have any queries regarding today's session, please do just leave it in the Q&A session down below and I'll be happy to help.

1:04

Thank you.

1:05

Brilliant.

1:05

Thanks, Tahmid.

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Great to have you on board today as well.

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So, yeah, just to reiterate as I'm going through the webinar, if you do have any questions, any queries, anything that you need to expand on further, please drop them in the Q&A or the group chat and Tahmid will be able to work his way through answering those for you as well.

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OK, so just to run through some of the learning objectives for this afternoon.

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So our aim is for you to be able to understand how to download the activities upload template ready to be then populated and uploaded into Compass+

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so by showing you where you can find that template

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and then if you are using spreadsheets at the moment to then populate that data into the spreadsheet and upload into Compass+ to allow you to understand how to download activities CSV files.

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So if you are using partner platforms currently, how you can then export and import that data out of your partner platforms and into Compass+, from that identify ways to analyse progress against the Gatsby benchmarks.

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Sorry.

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So yeah, looking at that data and those activities and events you are importing into Compass+ as a product and really seeing what that data visualisation looks like from your perspective and allowing you to be a bit more strategic moving forwards as to where you then spend time creating more events and activities.

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So we're going to look at analysing that data from the uploads again, just to reiterate on that last point as to where you can then achieve benchmarks.

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And then with all of our training, both face to face and online, we will leave a section at the end to direct

you to further support some more training and certainly where you can go to access any help if you need it.

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OK, so I'm just going to turn my video off so I can see the full screen.

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OK.

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So just to start off with, in terms of uploading and looking at data into Compass+ there's a bit of a cyclical process to that.

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And Compass+ is a great vehicle, a great tool to allow you to analyse the data that you import from your partner platforms or the upload spreadsheet and how you can then look to use that data to support progression within your programme.

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So it's kind of almost a chicken and egg.

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So you would look at running activities in your partner platform.

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So you would analyse the data and the information in Compass+ to then allow you to be quite strategic and focused in where you need to deploy your time, your effort, your resources to then go into partner platforms or if you are using spreadsheets onto spreadsheets as well to create those activities and events to regain

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then once they've taken place, download that CSV file from those partner platforms and then import into Compass+

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and then as you can see, they're starting that cyclical process of you do 1, then you start to use the other and it keeps evolving round like that.

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Now when I just mentioned Compass+ to be a tool and product that can help drive that forwards is by using these two or using these areas within Compass+ itself,

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so the areas where you can gather data and information from to help you start to create those events and activities.

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And where you can do that from is on the left hand side there that first visualisation

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they are the results and the analysis from your Compass evaluation.

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So once you've imported that information or put that information into Compass+, you can then analyse that data and those results in more granular detail,

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so you can really be specific and strategic in where you start to then create those events and activities.

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Again, really just to help avoid duplication of areas that you've already got covered.

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So the information you can get back from your compass evaluations on that left hand side that can certainly support the creation of events and activities in your partner platforms.

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Now on the right hand side of that data visualisation, there you've got the Future Skills Questionnaire.

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So Future Skills Questionnaire being a product that is embedded into Compass+, allowing you to get that learner perception, that learner voice on how your learners are perceiving their careers within your particular institutions.

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And what you can then do from that data is really address those gaps in provision, those learners that may need extra support in particular areas and that you can then start to create custom groups.

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You can then start to create group activities and events that help address those needs and those issues as well.

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So another strand of data that can be really, and certainly with the new custom reporting function, which I will loosely touch on today, you can use those two different areas within Compass+ to drive forward that creation of events activities in your partner platforms.

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OK, so what I'm just going to do now is I'm going to go into my demo account and start to show you really where you can access the activities upload template.

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So one of those objectives at the start was allowing you to see where you can access the activities upload template, populate that with any information that you may have on a spreadsheet and then import that into Compass+.

6:21

And then also to show you where you can find information on which different partner platforms Compass+ works alongside and how really simply you can download that information from your partner platform and then import that into to Compass+ as well.

6:38

OK, so just going to jump into my demo.

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So I'm going to start with the activities upload template.

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And where you can find that is within our help centre.

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So the activities upload template is a pre formulated spreadsheet.

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Sorry, a pre formulated spreadsheet that works alongside your existing spreadsheets that you may be using for creating activities and logging activities.

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And if I just type in here upload template and then hit enter, Compass+ will take me to our activities upload template.

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If I just select that top hyperlink and then click this one here, download the activities upload template.

7:22

Compass+ has now just downloaded.

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Just going to move that over there.

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Downloaded the activities upload template for me and what you will find now and I'll just zoom in so everybody can see what the headings are looking like.

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What we've got now is a spreadsheet that is already sort of formulated and ready for you to start entering your data and your information from any spreadsheets that you are using to house and store the information on your activities.

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Now, just a couple of things to really point out with this.

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So we've got when you're entering the data and information here that you've got those drop down boxes so you can identify which benchmark the activity is going to be mapped against.

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You've got your activity name.

8:03

Now where we need you to sort of pay real attention to detail is within these sections here,

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it's got to be quite specific in the format that you enter, the start date, the end date.

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And in terms of learners involved, this is where you would need to add in your UPN.

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So depending on if you are using spreadsheets at the moment to log your careers, your events and your activities, that you've really got to be quite specific in the information that you can populate into this spreadsheet.

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So that then when you upload it or import it into Compass+, the algorithms behind the scene, they then align with everything within Compass+ as well.

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And they import that data correctly.

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So hopefully if you are using spreadsheets at the moment to log your careers and activities, that it could be just a very simple copy and paste.

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But like I said at the start there, making sure that the information is put in in the right sort of format as well.

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So you've got your benchmark, your activity name, your date format, and then you've got your learners for the UPN.

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Now, once you've done that and you have completed your upload template, you can then start to populate that or import that into Compass+.

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And where you would do that is if I click into activities here on the left hand side on the navigation bar.

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If I click in your activities, Compass+ will take you to this page here.

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Now you've got a few different options here in the action section.

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So you've got a download activities, which would take all of the activities out of your Compass+ account.

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You've got this little up arrow, which is upload activities, and that's the one that we're interested in.

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So you've saved your spreadsheet or your activities upload spreadsheet onto your hard drive, your desktop, etcetera, and you're ready to then import that into Compass+.

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Where you can go to do that is here.

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So we're just clicking upload activities.

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What you would do now is you would either drag and drop your file into here or you would select it from wherever it's saved within your hard drive and your desktop.

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And then you would import it.

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Haven't got a sheet to obviously import here, but on the slide deck I will be able to show you what that looks like.

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And then if I just click close, once you've clicked upload, all of that data and that information you had on your upload template from that spreadsheet, that will then be housed and populated within Compass+.

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So that is where you can access the activities upload template.

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And then that you can import that into Compass+ as well.

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Now where I'm going to show you where you could look at the data that I mentioned from either A. your compass evaluations or your B. the future skills questionnaire is in this section here.

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So we've got our dashboard page.

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Want to just click into evaluations

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If I click into Compass evaluation on that navigation bar, Compass+ will take me to my evaluations page.

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So I've got any evaluations that I've got in progress, which are housed there at the top.

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And then I've also got any completed evaluations that I've already done within my institution.

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So where we're interested in here is on the right hand side in the actions button, if I just click + and then click on view results, Compass+ will take me to this visualisation area.

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And this is the information on as per my last Compass evaluation, how I am tracking as an institution against all of the different benchmarks.

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So it gives me the percentages I am working towards in terms of achieving the benchmarks, gives it for all 8, it gives us information on where we were in our last score.

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It can also, if I just click this drop down box here where it says show details, it can really help us out in terms of for a particular benchmark looking at and analysing the information on those sort of sub criteria.

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So all of those different elements that make up that particular benchmark, Compass+ will tell me in one of three ways how I'm actually progressing towards achieving that.

12:06

So it'll tell me I've either achieved that particular part of the sub criteria with a little green tick, say that I haven't achieved any part of that with a cross, or it will let me know that I'm working my way towards achieving raising aspirations of all students.

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And I could certainly start to do some further work on that.

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So in terms of one of the areas that we can gather that date and the information, this would certainly be one of them.

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So we can look at our compass evaluations, drill down into that granular detail to see where our gaps are within that particular benchmark, and now really start to allow us to be very strategic and very focused in where we create our events and activities in our partner platform.

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So rather than duplicating areas that we've already achieved, we can now be a bit more focused and think, right, you know what, I'm going to start creating something around raising aspirations for students and I'm maybe just going to create an event or an activity based on that.

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So depending on whichever benchmark you want to work towards, it really does help with that.

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So that's the first part of the data that we could look at within Compass+.

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The second part is going to be in our learner section.

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So again, on our navigation bar, if I click on our learner section here and then if I click into questionnaire, Compass+ will now take me to all things future skills questionnaire within Compass+.

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So we can see that we've got five different headings across the top here, we've got the generate links and then the next 4

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these are all around different types and different visualisations of reporting linked to the results from future skills questionnaire.

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So what we could do here is if I click into custom reporting and I just start to select on a particular questionnaire.

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So I'm looking for some data around my GCSE years.

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I'm going to use my current data for 24/25 academic year.

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And again now I'm starting to be quite strategic in terms of creating activities or getting data and information to create activities in my partner platform.

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If I wanted to, let's say, focus in on my learners that question 21 here says:

14:18

Do you feel confident talking about skills in an interview?

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So if I selected on that, Compass+ has now sort of reduced the data and the information for me to view.

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So I'm now looking at 179 entries, which are both my year 10s and my year 11s.

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If I want to just focus on year 11s, I've gone from 179 entries to 99 entries.

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If I then wanted to just focus on a particular form group and let's say 11 A, I've gone from 99 entries to 46.

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And then if I just scroll along to the side and I want to focus in on the no not yet.

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So in terms of the future skills questionnaire, what I've really started to analyse here now is I've drilled down into my year 11 learners from form Group 11A who've answered the question around do they feel

confident talking about skills in an interview to analysing 18 learners have said they've got no idea on how to talk about their skills effectively in an interview.

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Now if we think part of our role as careers leads is to really ensure that our learners have every opportunity within whatever their next step is, building their confidence around interviews would certainly be one of those.

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So what we could now do just from a couple of clicks and looking at this data and information is if I just scroll up and if I download this report, Compass+ will take this into a spreadsheet for me.

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And once it's populated that I've now got a selection of learners here that I could create a little custom group for and start to maybe put an event on or an activity that is linked solely to interviews, skills in an interview, that type of thing.

16:02

So I've used that data and that information to filter out down into these learners here that I can now go to my partner platform, whichever one that may be and start to create that activity or that event around interviews, interview techniques, skills, qualities, etcetera.

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So we've used those two streams of data, those two data strands within Compass+.

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We've looked at the evaluations and then we've looked at the future skills questionnaire.

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And that has then helped us to be able to identify the areas that we want to create an event or an activity for, to then be able to now go and create that within our partner platform, whichever that one may be.

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Now imagine then that you've gone into your partner platform, whichever one that is, you create that event or that activity along with a host of others and you now want to download that information and then import that into Compass+.

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Where we would do that is or where you would certainly identify which partner platforms Compass+ can work with.

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If I just click into the help centre again, and if I just type in here partner platform, what we will find is Compass+ will give you information on all of the different partner platforms that it works effectively with.

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So all of these partner platforms, as well as Compass+ are very, very effective products and tools.

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And they've all got areas of strength, but they can then also work well to compliment each other within the creation of events and activities and analysing those results is if you used one of these partner platforms,

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so for example, if I clicked on Unifrog, so if you use Unifrog as a partner platform, you could click on the hyperlink here

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and Compass+ would give you step by step instructions as to how you can download the CSV file of your interactions as it would be in Unifrog, how you can go about downloading that data and that information

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and then once you've done that, where you would go in Compass+, which I've just showed you earlier and I will do it again, where you can go into Compass+ to upload those activities.

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Now, what it will look like when you do upload a spreadsheet or a CSV file into Compass+ is this here.

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So I'll let you know that however many activities or interactions that you've had recorded, they have been then imported into Compass+.

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And it will be the same whether you're using the spreadsheet, the activities, upload spreadsheet, or information from a different partner platform as well.

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So Compass+ gives you that step by step guide.

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It gives you all the screen grabs and all the narratives around how you can download activities from your partner platform or using the activities upload template.

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And then I'll just show you again in terms of your activities as to where you would go to do that.

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It was just in activities, this little up arrow, which is upload activities.

19:03

You would then drag and drop that into there and those activities will be imported into Compass+.

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Not only would they be imported into your plan here, they would also then be imported into each of the learner profiles as well that your learners are attached to.

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But just to show you within your activities when you are starting to either use the CSV file from your partner platforms or the bulk activities upload template where you can start to look and see which activities come from what source, whether you've entered it directly straight into Compass+, whether you've used a partner platform or the upload template, you can look at the source here and it gives you the option

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certainly for myself, I don't have anything that's been imported from a partner platform, but if I did, that would be an option here as well.

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So I've got lots of activities that will be being generated within Compass+

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But if I just select this one here, this lets me know that this year 13 careers interview activity, this was imported into my activities via the upload spreadsheet.

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So we can start to see what that breakdown is of how we have generated activities into Compass+.

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The other part now to really focus on

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is what has been the impact of that.

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OK, so you've downloaded your CSV file, you've imported that into Compass+.

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You now want to see what impact those activities that you've imported in Compass+ will have on your achievement towards the Gatsby benchmarks.

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Again, to allow you to focus on those areas that you need to.

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So where we've got on your dashboard page, we've got our activities.

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If I just click into completed activities, Compass+ will now show me the impact that any activities that I've just uploaded into Compass+ will have had.

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So it can, it's shown me there that I've improved on my Benchmark 3.

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So whatever activities I imported, that's the impact that they've had.

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So again, it can allow you to go back to that drawing board or being strategic and thinking right

21:04

What other areas do I need to focus on?

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So a really nice way and a really nice visualisation to see from the download and upload what the impact's going to be on your activities and your achievement towards your benchmarks and where you can then work towards focusing in on those areas that you need to.

21:24

OK, so just jumping back into my slide deck and this is more just a reiteration really or a confirmation of what I've just gone through.

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So where you can identify the different partner platforms that work well with Compass+, what the activities upload template looks like and where you can access that as well.

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We've then got how you can then import those activities into your plan within Compass+.

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So we've got that upload section there.

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We've got the select file and it tells you how many activities has been imported.

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And then you can go back to that dashboard page and start to see the results of that.

22:05

Now if there are any errors when you're importing any activities and events, then Compass+ will analyse that data and it will let you know that there is some data that is either missing or it's in the wrong format.

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And it will let you know where that is in order for you to action that to be able to then complete that import.

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So I've showed you as well where you can see where the activities came from.

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So you can see here the source you've got Unifrog, Morrisby, we had the partner upload template, but that will let you see where they are coming from.

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And then we've got the review as well.

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So we can see that impact on our benchmarks.

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So just a quick recap.

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So step one, we're going to review that information and data within Compass+ start to really manage our activities.

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We're then going to populate our activities in our partner platforms and then start to download them.

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Once we've downloaded them to the CSV files, we would then import them into Compass+.

23:02

And then once we've done that, we would start to monitor that impact in terms of looking at how it is impacted our Gatsby benchmark achievement.

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So really nice simple four step approach that is very cyclical.

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It just keeps going round and round.

23:16

OK.

23:16

So just coming towards the end of the session now and just to highlight where you can access further support and training.

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So we've got the customer service team

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so that is Tahmid who's on the call today.

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You will be able to access the customer support section within the help Centre if you were having any problems around

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if you're having any technical issues around downloading and importing information to Compass+, you could certainly utilise our Compass+ support team.

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You've got your ECs and your hub support

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we always say if you are experiencing any problems at all, please reach out to them.

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They've got a lot of knowledge and expertise in this area and they've certainly got a wide range of networks as well that they can put you in touch with of schools that are effectively downloading and importing information.

24:02

If again, you're experiencing any problems with that. We've got the Compass+ help centre articles, which I'll mention in a couple of slides time as well.

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So basically as well where I went in to download that activities upload template, that is our Compass+ help centre

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and in there you'll find a plethora of articles to help you navigate your way around the platform.

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And then we've got the top one there, which is the partner platform support.

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So again, if you are using a partner platform, within your area, you will have an account manager.

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If you're struggling for whatever reason to either log activities or you're struggling to download them and then import them into Compass+, please reach out to them as well.

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You know, nobody wants a single point of failure where you're then stuck.

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So please reach out to those people that are there for you.

24:49

OK, so just a couple of slides on training that's available for yourself.

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So we've got the Compass+ careers leader training accessible by that QR code there.

24:58

So this training is fully funded and it's there to support you within your careers role.

25:02

So as the landscape of careers leadership changes so often, it's really important to help you be the best careers leader that you can be, and this training is designed around doing that.

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We've also got our wider careers option as well.

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Again, access via that QR code, so this can be done via our digital hub and you will go on there.

25:23

You would register an account and then you can complete any of these training modules.

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Again, designed to help you be the best that you can be within your careers position, but also then to help you navigate your way around our system as well.

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And then the last slide here just before we get to the feedback section is what's coming soon.

25:44

So hopefully everybody that's on the session, the webinar sorry will have heard of the careers impact system.

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And then falling in underneath that, the internal leadership review.

25:53

If you are in the position where you're starting to engage with that, then we've got an article there that gives you lots of advice and guidance on how you can prepare to complete that.

26:02

In the bottom section there we've got our updates and development.

26:05

So this help centre article is aligned to our product team.

26:08

So there's been lots of developments and releases within product recently.

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Custom reporting for FSQ, you've got activities report and learning reporting and there are a lot more in development as well.

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So staying up to date with how those are progressing is really important.

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So that's what that article is for there.

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OK, so I'm just going to I'll bring my camera back on.

26:32

If you are still on the session at the moment, if I could ask you to access the QR code there and leave any feedback from today's session, I know sometimes it's quite a lot to get through in a 30 minute session.

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But hopefully it's been useful to let you see where you can go to in order to download and upload the information into compass+ and then what you can then do as a result of that as well.

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So if the session has hopefully hit the mark today, if you could leave any feedback related to that.

27:01

But equally, if there are areas that you would like us to cover that we haven't, we do appreciate that obviously your time is very precious.

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And so when you come onto these webinars, we want to make sure that it is as applicable as possible for you.

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So if there's any areas that you feel we could improve on, please, you know, leave feedback to support that as well.

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And at this point, Tahmid, just before we close off, are there any outstanding questions at all?

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Hey Pete, none at all.

27:26

No, thank you.

27:28

All right, great.

27:28

Thank you very much for your help and support today

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Tahmid always appreciated.

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So thank you everyone.

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I really hope that webinar was useful, the bitesize ones can be quite intense and quite focused, but hopefully now you can go away and access that upload template.

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Certainly if you're using spreadsheets for recording your activities or understand now how simple it can be to download the CSV file from a partner platform, import that into Compass+ and then see what impact that has had on your benchmark achievement as well.

27:59

So hopefully it has been really useful and beneficial for you all.

28:02

Thank you very much for attending and hopefully see you all on a new webinar soon.

28:07

Thanks now bye, bye.