COMPASS+

Activities Upload Template Checklist for Compass+ Users

THE CAREERS & ENTERPRISE COMPANY

THIS GUIDE IS FOR COMPASS+ USERS WITH ADMIN OR EDITOR PERMISSIONS - Below is a list of recommended steps to help use our Activities Upload template effectively.

STEP	ACTION	RESOURCES	COMPLETE
Step 1 Plan and brief staff that will be using the template	• Decide which members of staff will be populating the Activities Upload template for their subject/specialist area • Ensure they are fully briefed and trained on how to use it • You may want to refresh your understanding for Gatsby Benchmark 4 Linking curriculum learning to careers • Head to the CEC Resource Directory for supporting resources and guidance for GBM 4, including My Learning My Future - a suite of resources that have been developed to help you speak confidently about careers related to a range of subjects as well as the various pathways and skills needed by employers	[Gatsby Benchmark 4](#) [Gatsby Benchmark Toolkit](#) [CEC Resource Directory](#) [My Learning My Future](#)	☐ ☐ ☐ ☐
Step 2 Accessing the template	• Go to the Compass+ Help Centre and download a copy of the Activities Upload template to use as your MASTER copy • A copy of the template will be downloaded onto your computer, open the Excel spreadsheet and click 'Enable editing' • Go to File > Save As > MASTER Compass+ Activities Upload Template • If your institution has a secure shared network i.e. Sharepoint or GoogleDocs, add the MASTER Compass+ Activities Upload Template to a prominent location where members of staff from subject/specialist areas can access it • Alternatively, you will need to save one copy of the template as your MASTER, then save a copy for each of the subject/specialist areas that will be using it. Once you have saved a MASTER copy, just follow the File > Save As steps to create a copy of the spreadsheet for each subject/specialist area	[How to upload activities using our Activities Upload template](#)	☐

Step 3
Understanding the spreadsheet
	• The spreadsheet has two tabs - Activities and Benchmarks
	  o Activities tab: record specific activity details here
	  o Benchmark tab: to be used as a guide for selecting the correct option for columns A (Benchmark) and B (Main category) for each activity recorded
	Remember – staff MUST follow the format as instructed at the top of each column! This is critical as entering information in an incorrect format will affect uploading the data into Compass+
		[Additional guidance on how to complete the Activities Upload spreadsheet](#)	☐

Step 4 Uploading the spreadsheet	**If your institution has a secure shared network:** • Once a term, download the MASTER Compass+ Activities Upload template from your shared network location, then simply follow the Help Centre article to upload this data into Compass+	[How to upload activities using our Activities Upload template](#)	☐

Step 4 Collating and uploading the spreadsheet	**If each area has their own copy of the spreadsheet:** • If you have created a copy of the template for each specialist/subject area, once a term you need to ask staff to send you their Activities Upload template. This should be populated with careers activities to-date that have been delivered in their subject/specialist area • Copy and paste this information for each area into your MASTER Compass+ Activities Upload template • Once you have copied across all area activities into your MASTER spreadsheet, you're ready to upload this information into Compass+. Just follow the instructions in the Help Centre article	[How to upload activities using our Activities Upload template](#)	☐
Step 5 Analysing activities	• Use the Activities Reporting feature in Compass+ to identify learners in need of additional support, monitor attendance, find out who is missing out on careers activities, filter by characteristics to plan targeted intervention and support, track learner progress and plan next steps • Celebrate success and feed back to staff on best practice, highlight curriculum areas that are doing particularly well so that they can inspire others and motivate them to successfully identify careers related activities in their own department too.	[Activities Reporting in Compass+](#)	☐

Use the space below to jot down any further actions required: