Custom Groups on Compass+

Below is a list of recommended steps for creating and using Custom groups.

COMPASS +

STEP	ACTIONS	RESOURCES	COMPLETE
Step 1 Preparation	• Find the Managing Groups section of the Compass+ Help Centre, bookmark this to your Favourites on your browser so you can refer back to it later if you need to • Familiarise yourself with the Groups section of Compass+, you'll find this in the Activities section on the main navigation bar • It's best practice to always review your learner data in Compass+ before creating a Custom group just to check that it correctly reflects your learners, and their corresponding year groups in your MIS (Management Information System) • Log in to Compass+, go to the Learner section from the main navigation bar, click on Current, then review your learner data to make sure that everything looks right • Creating a Custom group can be particularly helpful if you want to add learners to a group that are across year groups	[Managing Groups](#) [Log in to Compass+](#)	☐ ☐
Step 2 Understanding Custom Groups	• Clarify why you want to create a Custom group, this could be to target learners who have missed out on a careers activity, to target specific learners based on their Future Skills Questionnaire responses, or to ensure certain learners are offered specific activities based on their individual needs • Next, identify the learners to be added to the Custom group	[Learner Reporting - Current Learner List](#)	☐
Step 3 Using Custom Groups	• To create a Custom group, you need to log in to Compass+, go to the Activities section on the main navigation bar, then click on Groups • From the Groups page, click on 'Create a new group' in the top righthand corner • Remember that group names will be visible to ALL Compass+ users, Admin, Editors and Viewers so be mindful what you call your group. This name should provide enough information to identify its purpose. e.g. Year 10 potential NEETs, Year 11 Creative Industries, Independent Living Pathway • Return to the Groups screen anytime to update or edit your Custom groups • Save time by entering membership dates when you create a new Custom group, learners will be removed from the group automatically when membership to the group ends • You can also copy Custom groups to the next academic year, after copying a Custom group make sure you review these details, editing where necessary, this might require changing the group name, or adding or deleting individual learners • Quickly find a Custom group by using the search bar to the right of the Groups screen	[How to Create Custom Groups](#) [How to copy Custom groups from previous academic years to the current academic year](#) [How to manage Custom groups](#)	☐ ☐ ☐

Step 4 Utilising Custom Groups	• When you enter activities into Compass+, and need to add groups or learners to the activity, just start typing in the name of the relevant Custom group and it will pop up, click on it and it will be added to the activity • Use the Activities Reporting feature to filter activities by Custom Group and monitor learner engagement and attendance • If learners have been added to a Custom group, it will show on their Learner Profile in the Personal Information tab	[How to create an activity (BM 2-8)](#) [Activities Reporting in Compass+](#) [Learner Profile - Personal Information tab](#)	☐ ☐ ☐
Step 5 Further guidance and support	• If you get stuck, head to the Compass+ Help Centre, scroll down to the relevant section or alternatively use the search bar to type in your query • Review our Compass+ Bitesize Custom Groups webinar recording, it's only 30mins and covers the steps outlined in this checklist • To learn how to use more features of Compass+ effectively in your setting, complete free self-paced training • Don't forget the CEC Resource Directory, quickly find world-class, trusted, high-quality resources to help develop your careers programme.	[Compass+ Help Centre](#) [Groups Help Centre articles](#) [Custom Groups webinar recording](#) [Sign up or register for free self-paced training](#) [CEC Resource Directory](#)	☐ ☐ ☐ ☐ ☐