

# Digital Tools Guidance

How to use the online evaluation, planning and tracking tools to assess your careers provision against the Gatsby Benchmarks

# Contents

<b>What are Compass and Tracker?</b>	<b>I</b>
<b>The Careers Partners Database and Compass+</b>	<b>II</b>
<b>What are the benefits of Compass?</b>	<b>III</b>
<b>What are the benefits of Tracker?</b>	<b>IV</b>
<b>What are the benefits of the Careers Partners Database?</b>	<b>V</b>
<b>What are the benefits of Compass+?</b>	<b>VI</b>
<b>Managing users in our tools</b>	<b>VII</b>
<b>Schools</b>	<b>1</b>
Getting started with Compass	2
Viewing Compass results	5
Changes to sharing	6
Sharing Compass results	7

View shared Compass results	10
Getting started with Tracker	11
Copy current plan to next year	17
Sharing Tracker plan	19
Opening a shared Tracker plan	22
Download/print Tracker plan	25
Getting started with the Careers Partners Database	27
Getting started with Compass+	29
<b>Colleges</b>	<b>30</b>
Compass for Colleges	31
Viewing Compass results	34

# What are Compass and Tracker?

## COMPASS

CAREERS BENCHMARK TOOL

A digital tool to evaluate your careers provision against the eight Gatsby Benchmarks.

## TRACKER

CAREERS PLANNING TOOL

An interactive planning tool that enables a school or college to plan to improve their provision.



# The Careers Partners Database and Compass+

## CAREERS PARTNERS

EMPLOYERS DATABASE TOOL

A database to help you keep track of all your careers partners in one central place, only accessible to your institution.

## COMPASS +

THE CAREERS LEADER DASHBOARD

A new tool to help you benchmark, manage, track and report on your school's careers programme.



||

[Back to contents](#)



# What are the benefits of Compass?



## For your school or college?

- Evaluate careers and enterprise activity in around 30 minutes.
- Compare your school/college to the eight Gatsby Benchmarks for good career guidance.
- Identify strengths and areas for improvement.
- Get relevant online resources to help you improve on your score in relation to each benchmark, including dedicated resources to support careers provision for students with SEND.

# What are the benefits of Tracker?

## For your school or college?

- Build and manage your annual plan for careers and enterprise activity, targeted to gaps.
- Easily record events, classes and all careers activities in one place.
- Access, download and share your plan in Excel format with colleagues, Leadership Teams, OfSTED, governors, Enterprise Coordinators and Enterprise Advisers.
- Evaluate the success of completed activities.





# What are the benefits of the Careers Partners Database?



## For your school or college?

- Store all of your key careers partners in one easy-to use central database, only accessible to your institution.
- Quickly add these partners to your activities in Tracker, so that you know who is delivering your activities or where you have gaps.

# What are the benefits of Compass+?



## For your school or college?

- Quickly map out your careers programme for the academic year.
- Create custom groups so you can target relevant careers interventions to the pupils most in need.
- Create detailed reports and data visualisations to monitor performance.
- Encourage collaboration by allocating tasks, sharing contacts and allowing colleagues to contribute to your careers education programme.
- Receive intelligent provider recommendations for activities, based on your location and activity type.



# Managing users in our tools

When setting up a new user in your institution for any of our digital tools, there are a number of different roles and associated permissions available. For full details of what each role can do, visit our [Support site](#).

## Admin:

- can manage institution users;
- can create and share Compass evaluations;
- can create and share Tracker activities;
- can create and edit partners in Careers Partner Database.

## College Department Admin

- can manage department users;
- can create and share departmental Compass evaluations;
- can create and share departmental Tracker activities;
- can create and edit partners in Careers Partner Database.

## Editor:

- can create Compass evaluations;
- can create Tracker activities;
- can create and edit partners in Careers Partner Database.

## Viewer:

- can view existing Compass evaluations;
- can view existing Tracker activities;
- can view Careers Partner Database.

# Schools

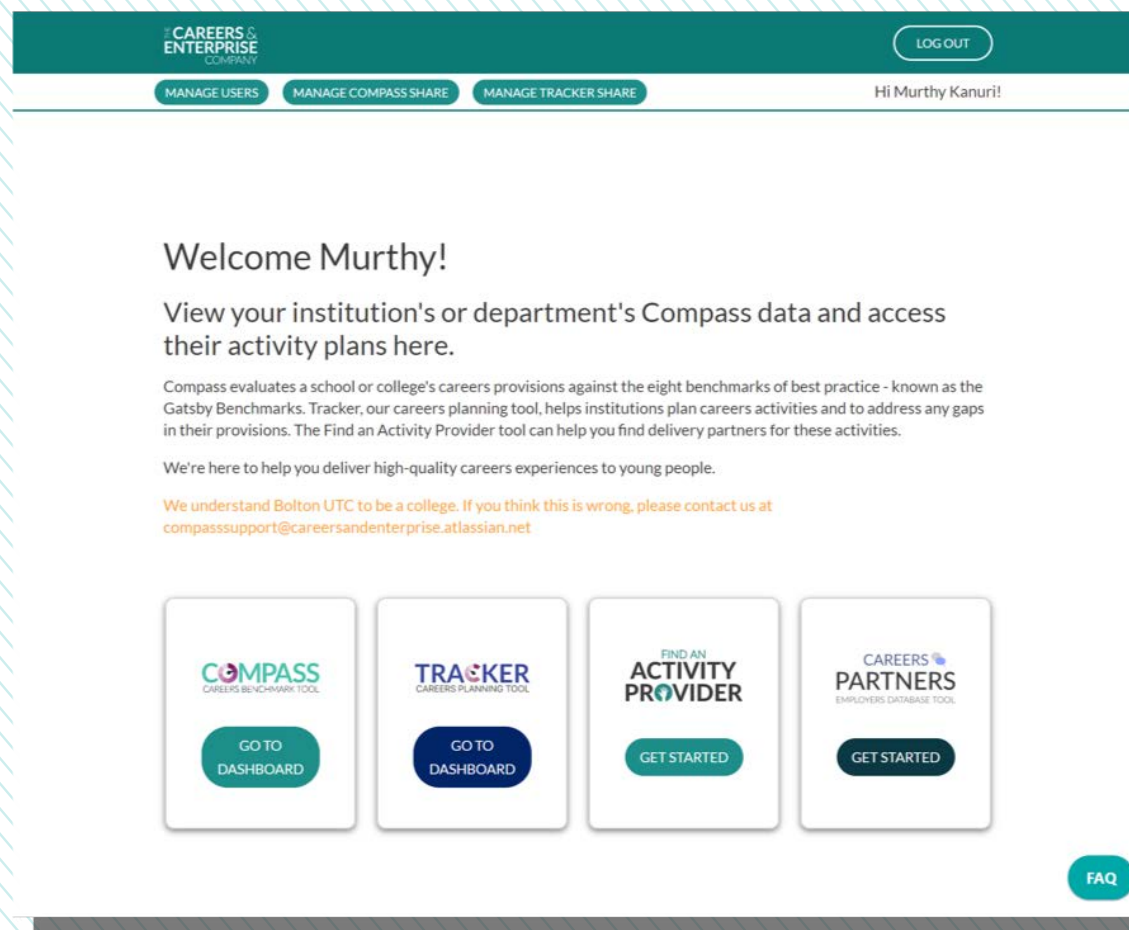


# Getting started with Compass

Beginning with a Compass evaluation against Gatsby Benchmarks

**1** | Click on 'Go to dashboard' under the Compass logo which will take you to the Compass dashboard.

**2** | Once on the Compass dashboard, click "GET STARTED" which will begin the questionnaire.





## Beginning with a Compass evaluation against Gatsby Benchmarks

**3** | It will ask you to confirm your URN (your institutions unique reference number).

Please note: it is important you use the same URN used to create the account otherwise Tracker will not unlock.

**4** | Selecting if you are a College, School or Sixth form comes next.

Please note: if you have a sixth form, select the school option.



### Your institution

Is this the institution you're evaluating now?

ABC International School  
Postcode:  
URN: 141415

- ☐ Yes  
☐ No

[Back](#) [NEXT](#)  
[Save and complete later](#)

#### About Compass

Compass helps you to plan your careers and enterprise work by benchmarking your current activity.

[Contact us by email](#)

[More about Compass](#)

[The Careers & Enterprise Company](#)

[The Gatsby Good Career Guidance Report](#)

[Printable Compass questions \[PDF\]](#)

## Beginning with a Compass evaluation against Gatsby Benchmarks

**5** | The question after will ask you how many students you have.

Please note: image is schools and sixth form option.



Please answer the questionnaire as clearly and accurately as possible in order to receive an accurate result against the Gatsby Benchmarks.

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Compass](#)
- [Sharing Compass result](#)
- [View shared Compass result](#)



### Your School

Which year groups attend your school?

Years	No. of students
Below year 6	<input type="text" value="0"/>
Year 6	<input type="text" value="0"/>
Year 7	<input type="text" value="0"/>
Year 8	<input type="text" value="0"/>
Year 9	<input type="text" value="0"/>
Year 10	<input type="text" value="0"/>
Year 11	<input type="text" value="0"/>
Year 12	<input type="text" value="0"/>
Year 13	<input type="text" value="0"/>

☐ None of the above

[Back](#) [NEXT](#)

### About Compass

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[Contact us by email](#)

[More about Compass](#)

[The Careers & Enterpriser Company](#)

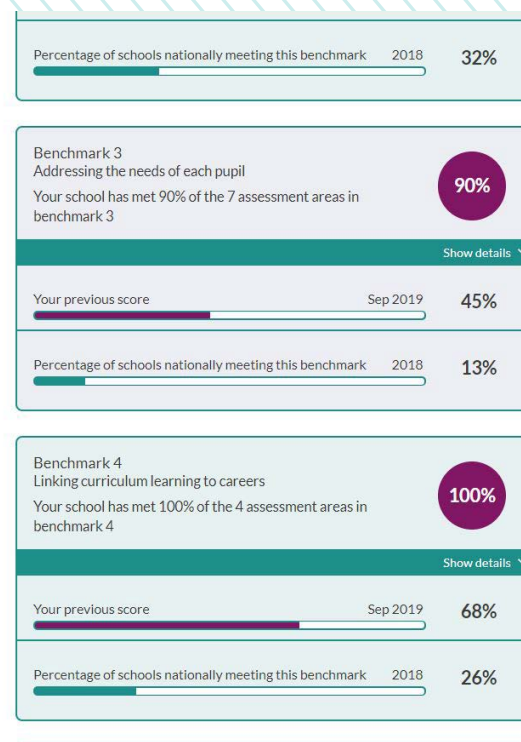
[The Gatsby Good Career Guidance Report](#)

[Printable Compass questions \[PDF\]](#)

# Viewing Compass results

Once you've completed the Compass questionnaire it will produce your results.

**1** | Once you've completed the last question you will be prompted to view results, which are marked against each of the Gatsby Benchmarks.






# Changes to sharing

- With the introduction of the revised account structure in Easter 2019, only institution admins can share Compass evaluations or Tracker plans.
- Sharing is also more efficient with “Share once, share always”. This means that once you set up a sharing link with someone external to your institution, they will receive copies of all past, present (and when you create them, future) evaluations and plans.
- Sharing is now read-only - previously you could share Tracker plans and make them editable, but this is no longer possible.
- If you are an admin, you can manage your Compass shares by selecting the button ‘Manage Compass share’ in the main navigation.

Manage Compass Share

 Share all evaluations


Please check account to ensure the recipient email is registered in our database.

To:  [CHECK ACCOUNT](#)

This will allow another registered user to access your Compass evaluations within their account.

Any data shared will be used in accordance with The Careers & Enterprise Company's [Privacy Policy](#) and data protection law.

[SHARE](#)

THE CAREERS & ENTERPRISE COMPANY  GATSBY

# Sharing Compass result

There are two ways to share your Compass results with anyone with or without an account:

1. Share via account: Person you share with will need to have a Compass Classic or Compass+ account.
2. Share via link: Person you share with does not need to have an account, a link will be generated with your results and breakdown in which you can copy the link to them. The link is ideal for sharing information with the Headteacher, SLT members, Chair of Governors or your Enterprise Advisers (if in the network).

## Sharing via account

1 | Look to the header bar and select "Manage Compass Share".

2 | Click the "Share" button.

The screenshot displays the Compass Careers Benchmark Tool interface. At the top, a dark teal header bar contains the 'CAREERS & ENTERPRISE COMPANY' logo, a 'LOG OUT' button, and navigation links for 'MANAGE USERS', 'MANAGE COMPASS SHARE', and 'MANAGE TRACKER SHARE'. Below the header, the user is greeted with 'Hi Krista McKenzie Claud Kohler!' and a 'Welcome Krista McKenzie!' message. A brief description of the tool's purpose is provided, followed by a 'TOOLS' section with the same navigation links. The main content area is titled 'Manage Compass Share' and features a 'SHARE' button. Below this is a table with one record:

ID	School	Shared with	Actions
79	Careers School	ec1@ec.com	

One record

## There are two ways to share your Compass results with anyone with or without an account:

1. Share via account: Person you share with will need to have a Compass Classic or Compass+ account.
2. Share via link: Person you share with does not need to have an account, a link will be generated with your results and breakdown in which you can copy the link to them. The link would be ideal for sharing information with the Head-teacher, SLT members, Chair of Governors or your Enterprise Advisers (if in the network).

**3** | Enter the account email of the person you wish to share the survey with, click “CHECK ACCOUNT” to verify they have a Compass and Tracker account, if they do the message above should say valid account and then press “SHARE”.

**4** | You should then see a successful green dialogue box appear in the top right corner.

The screenshot shows the 'Share all evaluations' dialog box in the Compass Careers Benchmark Tool. The dialog box contains the following text:

**Share all evaluations**

Email address is valid. Click share to share all your evaluations with admin@enterprisecollege.edu

To:  CHECK ACCOUNT

This will allow another registered user to access your Compass evaluations within their account.

Any data shared will be used in accordance with The Careers & Enterprise Company's [Privacy Policy](#) and data protection law.

SHARE

Below the dialog box, a green confirmation message appears in the top right corner:

✓ All your evaluations were successfully shared with admin@enterprisecollege.edu

The main interface shows the 'Manage Compass Share' section with a table of shared evaluations:

ID	School	Shared with	Actions
79	Careers School	ec1@ec.com	<span>✕</span>
152	Careers School	admin@enterprisecollege.edu	<span>✕</span>

2 records

At the bottom right, there is a button labeled 'SHARE'.



## There are two ways to share your Compass results with anyone with or without an account:

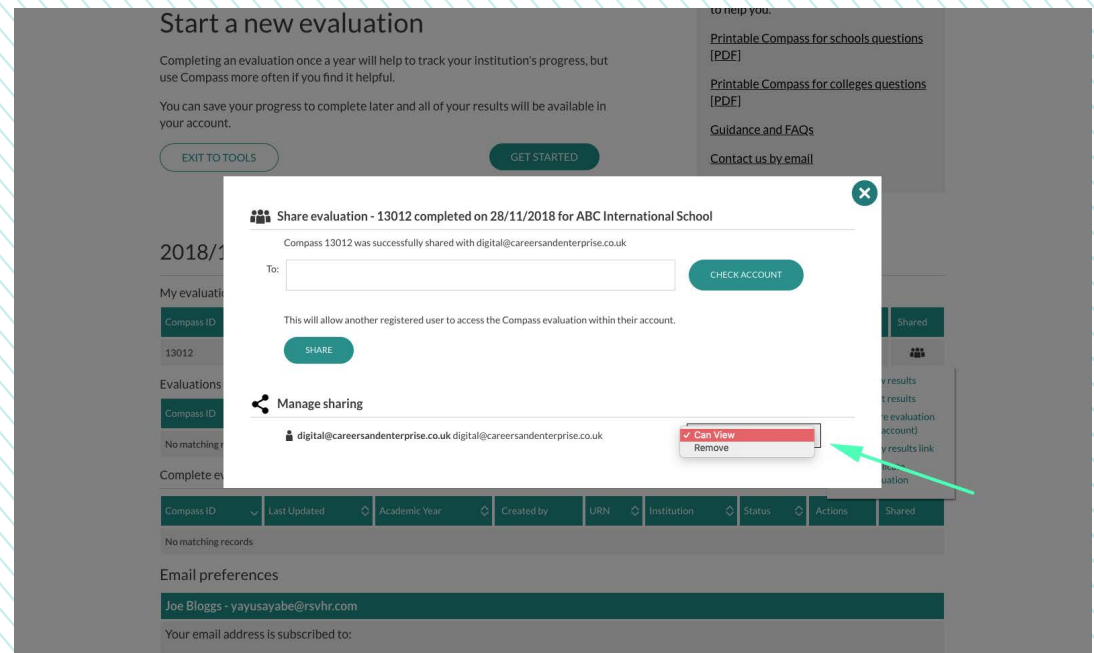
1. Share via account: Person you share with will need to have a Compass and Tracker account.
2. Share via link: Person you share with does not need to have an account, a link will be generated with your results and breakdown in which you can copy the link to them. The link would be ideal for sharing information with the Head-teacher, SLT members, Chair of Governors or your Enterprise Advisers (if in the network).



You can also revoke your share permission by clicking on the action button and selecting “remove”.

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Tracker](#)
- [Copy current plan to next year](#)
- [Opening a shared Tracker plan](#)
- [Sharing Tracker plan](#)



# View shared Compass result

Viewing and printing shared Compass results

**1** | Once the Compass result has been shared to your account, go to your Compass dashboard.

**2** | Scroll down to the sub heading “Evaluations shared with me” and click the action button.

## Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Compass](#)
- [Opening a shared Tracker plan](#)
- [Sharing Tracker plan](#)
- [Sharing Compass results](#)



## Start a new evaluation

Completing an evaluation once a year will help to track your institution's progress, but use Compass more often if you find it helpful.

You can save your progress to complete later and all of your results will be available in your account.

[EXIT TO TOOLS](#)

[GET STARTED](#)

### Compass support

If you need support with your evaluation please reference the documents below or email our support team who will be able to help you.

[Printable Compass for schools questions \[PDF\]](#)

[Printable Compass for colleges questions \[PDF\]](#)

[Guidance and FAQs](#)

[Contact us by email](#)

## 2018/19 Evaluations

### My evaluations

Compass ID	Last Updated	Academic Year	Created by	URN	Institution	Status	Actions	Shared
13012	28/11/2018	2018/19	yayusayabe@rsvhr.com	141415	ABC International School	Completed	<a href="#">...</a>	

### Evaluations shared with me

roy.margolis@hotmail.com has shared the Compass evaluation for ABC International School								
Compass ID	Last Updated	Academic Year	Created by	URN	Institution	Status	Actions	
12289	13/11/2018	2018/19	roy.margolis@hotmail.com	141415	ABC International School	Completed	<a href="#">...</a>	

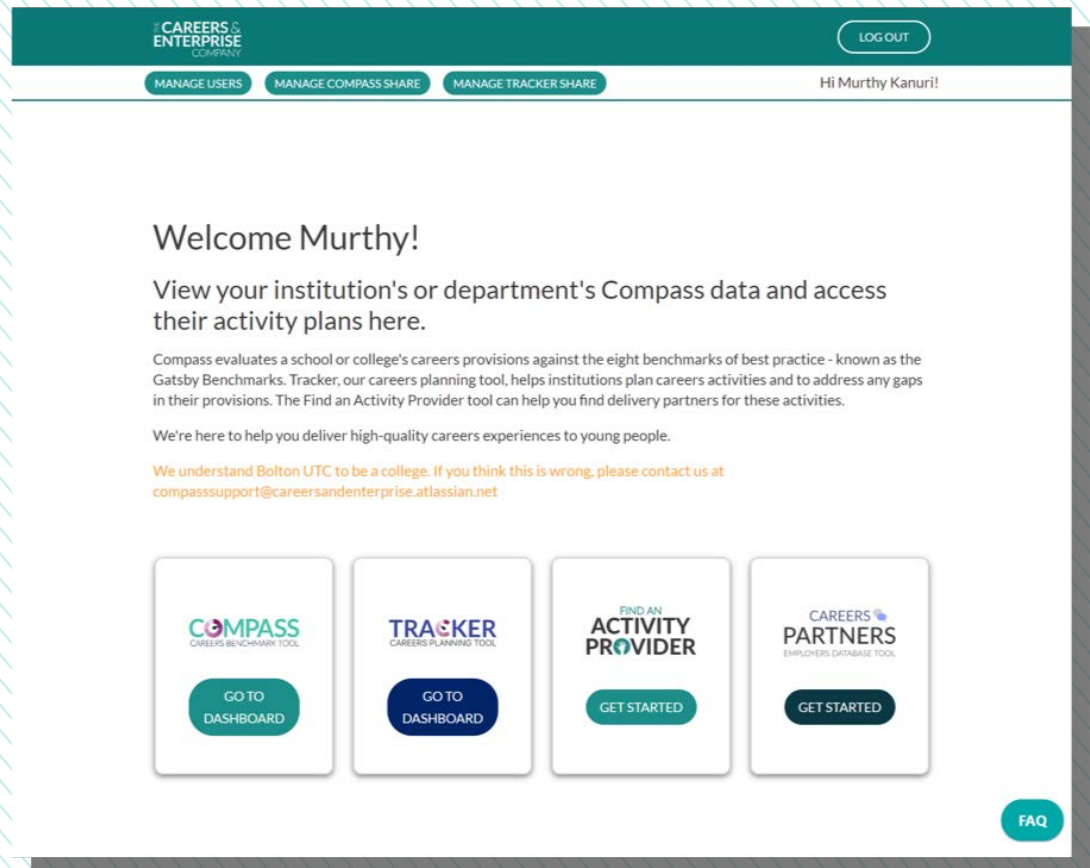
Complete evaluations from previous years

# Getting started with Tracker

After Compass has been completed, Tracker allows you to plan activities based on the results of your survey.

**1** | Once you've completed a Compass survey on your account, Tracker will unlock automatically.

**2** | Click "GET STARTED" on the Tracker image which will take you to the dashboard.





After Compass has been completed, Tracker allows you to plan activities based on the results of your survey.

**3** | Click “ADD ACTIVITY” to begin planning activities.

The screenshot shows the Tracker Careers Planning Tool interface. At the top, there is a dark blue navigation bar with three links: "TOOLS", "FIND AN ACTIVITY PROVIDER", and "LOG OUT". Below the navigation bar, the "TRACKER CAREERS PLANNING TOOL" logo is displayed. The main heading is "Welcome to Tracker", followed by the school name "ABC International School". A paragraph explains that the tool helps build and manage careers plans, showing latest Compass scores and planned activities. A link to guidance and FAQ documents is provided. Below this, the "My plans" section is divided into two parts: "Current plan" for the 2018/2019 year with an "ADD ACTIVITY" button, and "Next year's plan" for the 2019/2020 year with a "START PLAN" button. At the bottom, a section titled "Looking for activities to plan for your students?" includes a link to a directory of providers.

TOOLS FIND AN ACTIVITY PROVIDER LOG OUT

**TRACKER**  
CAREERS PLANNING TOOL

## Welcome to Tracker

ABC International School

Tracker will help you to build and manage your careers plan for the year. Each benchmark shows your latest Compass score and the activities you have planned so far. Select a benchmark to start building your plan.

If you need support with Tracker please reference [our guidance and FAQ document](#) or [contact us](#) by email.

### My plans

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**Current plan**  
Start your plan in Tracker to help manage your careers plan for 2018/2019

[ADD ACTIVITY](#)

**Next year's plan**  
[START PLAN](#)  
Start your plan for the next academic year 2019/2020

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### Looking for activities to plan for your students?

We have a directory of providers who might help with that.

[FIND AN ACTIVITY PROVIDER](#)

After Compass has been completed, Tracker allows you to plan activities based on the results of your survey.

**4** | As you see, the benchmark boxes indicate the percentages from your Compass questionnaire results. Select a benchmark in order to create an activity.

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Tracker](#)
- [Copy current plan to next year](#)
- [Opening a shared Tracker plan](#)
- [Sharing Tracker plan](#)

## Welcome to Tracker

### The British School

Tracker will help you to build and manage your careers plan for the year. Each benchmark shows your latest Compass score and the activities you have planned so far. Select a benchmark to start building your plan.

Select a benchmark to add an activity

**Benchmark 1**  
*Stable careers programme*  
No activities planned  
Compass result 77%

**Benchmark 2**  
*Career information*  
No activities planned  
Compass result 55%

**Benchmark 3**  
*Learner needs*  
No activities planned  
Compass result 91%

**Benchmark 4**  
*Curriculum*  
No activities planned  
Compass result 100%

**Benchmark 5**  
*Employer encounters*  
No activities planned  
Compass result 100%

**Benchmark 6**  
*Workplace experiences*  
No activities planned  
Compass result 33%

**Benchmark 7**  
*Educational encounters*  
No activities planned  
Compass result 75%

**Benchmark 8**  
*Personal guidance*  
No activities planned  
Compass result 38%

Activity name	Start date	Finish date	College lead	Category	Benchmark	Mark as completed
Parity	29/11/2018	29/11/2018	Joe Bloggs	Employer mentoring	5	
<div> <div>Year groups</div> <div>Year 16-18 (250)</div> <div>19-24 (with EHCP) (250)</div> </div> <div> <div>Students</div> <div>Providers</div> <div>Careers activity provider (1)</div> <div>Elba</div> </div> <div> <div>Frequency</div> <div>One off event</div> </div>						
<div> <div>View activity notes</div> <div>Add evaluation notes</div> <div>Edit</div> <div>Remove</div> </div>						
YPM	04/12/2018	05/12/2018	Monnie Smith	Local authority collaboration	3	
<div> <div>Year groups</div> <div>Year 16-18 (250)</div> <div>19-24 (with EHCP) (250)</div> </div> <div> <div>Students</div> <div>Providers</div> <div>Traineeship provider (1)</div> <div>Workshops</div> </div> <div> <div>Frequency</div> <div>One off event</div> </div>						
<div> <div>View activity notes</div> <div>Add evaluation notes</div> <div>Edit</div> <div>Remove</div> </div>						

DOWNLOAD PLAN

## Create activities quickly on Tracker.

In order to set-up an activity in Tracker, you need to fill in the details for that activity. Only a couple of these fields are mandatory, making it easier for you to create and update activities as details are finalised.

### The form asks for the following info:

- Key activity details - such as activity name, lead, and date of activity
- The year groups attending that activity

The screenshot displays a two-step form for creating an activity in Tracker. Step 1, 'ADD KEY ACTIVITY DETAILS', includes fields for: 'Give your activity a name \*' (with a placeholder 'For example: Careers fair'), 'Select a category for this activity \*' (a dropdown menu), 'Please enter a school or college lead for this activity' (with a placeholder 'Provide a lead name'), and 'Select a date and time for this activity' (with sub-fields for 'Start date', 'Start time', 'End date', and 'End time'). Step 2, 'ADD YEAR GROUPS FOR THIS ACTIVITY', includes a field for 'Select one or more year groups for this activity' (with a placeholder 'Add year groups'). The form is presented in a clean, modern style with a light blue and white color scheme.

You can now find organisations to help deliver an activity.

If you click “See potential organisations for this activity” Tracker will automatically recommend you a number of activity providers based on the following information:

- Your institution’s location.
- The Gatsby Benchmark you’ve chosen to address with this activity.
- You can then choose to visit their website or to contact them directly through a web form.

The screenshot shows a web form titled "3 ADD PROVIDERS OR EMPLOYERS TO YOUR ACTIVITY". On the left, a vertical line with a circle containing the number "3" and a pencil icon indicates the current step. The form contains two main sections. The first section is titled "Need help finding a business volunteer or partner organisation to deliver this activity?". It includes a text box with the placeholder "Find activity providers or business volunteers who can deliver this activity in your school." and a button labeled "See potential organisations for this activity". The second section is titled "Already have an employer or provider for this activity?". It contains explanatory text: "If the employer or provider are in your Careers Partners database tool, they will automatically show in the drop down below. If not, start typing their name, and add them to this activity and to your Careers Partners database, to easily access them again in the future." Below this text is a search input field with the placeholder "Select employers, providers or start typing a name" and a dropdown arrow. At the bottom of the form, there is a teal button labeled "SAVE ACTIVITY TO PLAN" and a line of text: "If you are happy with your activity, then select save below and we will add it to your plan. You can edit this activity at any time via your plan page."



You can now also add employers or providers to your activity quickly with our Careers Partners Database.

If you have added Careers Partners to your database, then these will display in the dropdown. Select the partner that is delivering this activity and it will display in the field.

If the partner delivering your activity is not in your database then start typing and add them to both the activity and your Careers Partners Database at the same time.

[Read more about the Careers Partners Database.](#)

The screenshot shows a web form titled '3 ADD PROVIDERS OR EMPLOYERS TO YOUR ACTIVITY'. It contains two main sections. The first section, 'Need help finding a business volunteer or partner organisation to deliver this activity?', includes a text input field with the placeholder 'Find activity providers or business volunteers who can deliver this activity in your school.' and a link 'See potential organisations for this activity'. The second section, 'Already have an employer or provider for this activity?', explains that if the partner is in the database, they will appear in the dropdown. If not, users should type the name. Below this is a dropdown menu with the placeholder 'Select employers, providers or start typing a name'. At the bottom, a teal button labeled 'SAVE ACTIVITY TO PLAN' is shown, preceded by a note about saving the activity to a plan.

# Copy current plan to next year

You can now copy your current Tracker plan to plan for the next academic year.

**1** | Go to your Tracker dashboard and click the action button.

**2** | Click on the action button and select “copy activities to next years plan”.

**3** | A dialogue box will appear asking you to confirm, click “COPY ACTIVITIES”

Please note: this may take a few moments if you have a lot of activities.

TOOLS FIND AN ACTIVITY PROVIDER LOG OUT

**TRACKER**  
CAREERS PLANNING TOOL

Welcome to Tracker  
ABC International School

Tracker will help you to build and manage your careers plan for the year. Each benchmark shows your latest Compass score and the activities you have planned so far. Select a benchmark to start building your plan.  
If you need support with Tracker please reference [our guidance and FAQ document](#) or [contact us](#) by email.

My plans

Current plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2018/19	Joe Bloggs	28/11/2018	<ul style="list-style-type: none"><li>View/Edit plan</li><li>Share (via account)</li><li>Download</li><li>Copy activities to next year's plan</li></ul>	

Next year's plan

START PLAN

Start your plan for the next academic year: 2019/2020

Looking for activities to plan for your students?  
We have a directory of providers who might help with that.

FIND AN ACTIVITY PROVIDER

THE CAREERS & ENTERPRISE COMPANY

You can now copy your current Tracker plan to your plan for the next academic year.

4

You will then get a green successful box in the top right corner indicating the migration has been successful.

The screenshot shows the Tracker Careers Planning Tool interface. At the top, there is a dark blue header with navigation links: TOOLS, FIND AN ACTIVITY PROVIDER, and LOG OUT. A green notification box in the top right corner states: "All activities from Tracker plan created by digital@careersandenterprise.co.uk in 2018 have been copied to next year's plan". The main content area has a white background with the Tracker logo and the text "Welcome to Tracker" and "ABC International School". Below this, a message explains the tool's purpose and provides links for guidance and support. The "My plans" section features a table titled "Current plan" with columns: Institution, URN, Academic year, Created by, Last updated, Actions, and Shared. The table contains one row for "ABC International School" with URN "141415", Academic year "2018/19", Created by "Fred Flintstone", Last updated "22/01/2019", and icons for Actions and Shared. Below the table, there is a "Next year's plan" section with a "START PLAN" button and a note to "Start your plan for the next academic year 2019/2020". At the bottom, there is a section "Looking for activities to plan for your students?" with a "FIND AN ACTIVITY PROVIDER" button and a link to "FAQ's".

TOOLS FIND AN ACTIVITY PROVIDER LOG OUT

**TRACKER**  
CAREERS PLANNING TOOL

Welcome to Tracker  
ABC International School

Tracker will help you to build and manage your careers plan for the year. Each benchmark shows your latest Compass score and the activities you have planned so far. Select a benchmark to start building your plan.  
If you need support with Tracker please reference [our guidance](#) and [FAQ document](#) or [contact us](#) by email.

My plans

Current plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2018/19	Fred Flintstone	22/01/2019	...	...

Next year's plan

[START PLAN](#)

Start your plan for the next academic year 2019/2020

Looking for activities to plan for your students?

We have a directory of providers who might help with that.

[FIND AN ACTIVITY PROVIDER](#)

[FAQ's](#)

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Tracker](#)
- [Copy current plan to next year](#)
- [Sharing Tracker plan](#)
- [Opening a shared Tracker plan](#)

# Sharing your Tracker plan

You can now share your Tracker plan with another user who has a Compass Classic or Compass+ account. If you are in our network, please share your plan with your Enterprise Coordinator.

## Sharing via account

1 | Look at the header bar and select “Manage Tracker Share”.

2 | Click the “Share” button.

The screenshot shows the Tracker interface. At the top is a green header bar with the 'CAREERS & ENTERPRISE COMPANY' logo on the left, three navigation buttons ('MANAGE USERS', 'MANAGE COMPASS SHARE', 'MANAGE TRACKER SHARE') in the center, and a 'LOG OUT' button on the right. Below the header, the user is greeted with 'Hi Krista McKenzie Claud Kohler!'. The main content area says 'Welcome Krista McKenzie!' and 'View your institution's or department's Compass data and access their activity plans here.' It then provides a brief description of the Tracker tool and its purpose. Below this is a blue navigation bar with 'TOOLS' on the left and 'FIND AN ACTIVITY PROVIDER' and 'LOG OUT' on the right. The 'MANAGE TRACKER SHARE' button is highlighted. Below the blue bar, the 'TRACKER CAREERS PLANNING TOOL' logo is displayed. The section is titled 'Manage Tracker Share' and features a 'SHARE' button. A table with one record is shown, with columns for ID, School, Shared with, and Actions.

ID	School	Shared with	Actions
19	Careers School	ec1@ec.com	

One record



You can now share your Tracker plan with another user who has a Compass Classic or Compass+ account. If you are in our network, please share your plan with your Enterprise Coordinator.

**3** | Enter the account email of the person you wish to share the survey with, click “CHECK ACCOUNT” to verify they have a Compass and Tracker account, if they do the message above should say valid account and then press “SHARE”.

**4** | You should then see a successful green dialogue box appear in the top right corner.

The screenshot displays the Tracker Careers Planning Tool interface. At the top, there are navigation tabs: 'MANAGE USERS', 'MANAGE COMPASS SHARE', and 'MANAGE TRACKER SHARE'. The user is logged in as 'Hi Krista McKenzie Claud Kohler!'. A modal dialog box titled 'Share all plans' is open, showing a confirmation message: 'Email address is valid. Click share to share all your plans with admin@enterprisecollege.edu'. The 'To:' field contains 'admin@enterprisecollege.edu'. Below this, it states: 'This will allow another registered user to access your Tracker plans within their account. Any data shared will be used in accordance with The Careers & Enterprise Company's Privacy Policy and data protection law.' There are 'CHECK ACCOUNT' and 'SHARE' buttons. A green success message in the top right corner reads: 'All your plans were successfully shared with admin@enterprisecollege.edu'. Below the dialog, the 'Manage Tracker Share' section shows a table with 2 records.

ID	School	Shared with	Actions
19	Careers School	ec1@ec.com	
43	Careers School	admin@enterprisecollege.edu	

2 records

You can now share your Tracker plan with another user who has a Compass Classic or Compass+ account. If you are in our network, please share your plan with your Enterprise Coordinator.

**5** | On your Tracker dashboard you will see an icon that indicates you have shared your plans.

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Tracker](#)
- [Copy current plan to next year](#)
- [Sharing Tracker plan](#)
- [Opening a shared Tracker plan](#)

## TRACKER

CAREERS PLANNING TOOL

Welcome to Tracker

ABC International School

Tracker will help you to build and manage your careers plan for the year. Each benchmark shows your latest Compass score and the activities you have planned so far. Select a benchmark to start building your plan.

If you need support with Tracker please reference our [guidance and FAQ document](#) or [contact us](#) by email.

### My plans

#### Current plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2018/19	Joe Bloggs	28/11/2018	...	

#### Next year's plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2019/20	Joe Bloggs	28/11/2018	...	

### Plans shared with me

ABC International School has shared the Tracker plan for: ABC International School						
Institution	URN	Academic year	Created by	Last updated	Actions	
ABC International School	141415	2018/19	Fred Flintstone	28/11/2018	...	

Looking for activities to plan for your students?

We have a directory of providers who might help with that.

[FIND AN ACTIVITY PROVIDER](#)

# Opening a shared Tracker plan

How to view/edit a Tracker plan that has been shared with you.

1 | Go to your Tracker dashboard.

2 | The “Plans shared with me” sub-heading will have all the plans shared to you via account below.

**TRACKER**  
CAREERS PLANNING TOOL

Welcome to Tracker

ABC International School

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My plans

Current plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2018/19	Joe Bloggs	28/11/2018	...	...

Next year's plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2019/20	Joe Bloggs	28/11/2018	...	

Plans shared with me

Fred Flintstone has shared the Tracker plan for ABC International School						
Institution	URN	Academic year	Created by	Last updated	Actions	
ABC International School	141415	2018/19	Fred Flintstone	28/11/2018	...	

Looking for activities to plan for your students?

We have a directory of providers who might help with that.

[FIND AN ACTIVITY PROVIDER](#)

## How to view/edit a Tracker plan that has been shared with you.

**3** Click the action button to view, edit, download plan or copy plan to current year (depending on the permissions given to you by sharer).



- “View” will allow you to see the sharers plan, you will not be able to edit.
- “Edit” will allow you to view and make changes to the plan details, delete and complete tasks.

### Welcome to Tracker

ABC International School - 2018/19

Tracker will help you to build and manage your careers plan for the year. Each benchmark shows your latest Compass score and the activities you have planned so far. Select a benchmark to start building your plan.

Select a benchmark to add an activity

**Benchmark 1**  
Stable careers programme  
18 activities planned  
Compass result: 83%

**Benchmark 2**  
Career information  
3 activities planned  
Compass result: 100%

**Benchmark 3**  
Pupil needs  
4 activities planned  
Compass result: 83%

**Benchmark 4**  
Curriculum  
1 activity planned  
Compass result: 83%

**Benchmark 5**  
Employer encounters  
3 activities planned  
Compass result: 55%

**Benchmark 6**  
Workplace experiences  
2 activities planned  
Compass result: 100%

**Benchmark 7**  
Educational encounters  
1 activity planned  
Compass result: 75%

**Benchmark 8**  
Personal guidance  
1 activity planned  
Compass result: 100%

Activity name	Start date	Finish date	School lead	Category	Benchmark	Mark as completed
new activity	13/11/2018	14/11/2018	Fred	Online Resources	2	✓
Test1	22/11/2018	23/11/2018	testing1	Continuing Professional Development (CPD)	2	⋮

Year groups  
Year 16-18 (100)  
19-24 (with EHCP) (100)

Students

Providers

Frequency  
One off event

[View activity notes](#)[Add evaluation notes](#)[Edit](#)[Remove](#)

DOWNLOAD PLAN



## How to view/edit a Tracker plan that has been shared with you.



“Copy plan to current year” will allow you to migrate the shared plan to your personal plan on your account.

Current plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2018/19	Joe Bloggs	28/11/2018	...	...

Next year's plan

Institution	URN	Academic year	Created by	Last updated	Actions	Shared
ABC International School	141415	2019/20	Joe Bloggs	28/11/2018	...	

Plans shared with me

Copy activities to current plan

All activities in this plan will be copied to your current plan. The activities will be changed to DRAFT status in your current plan and the activity dates will be changed to the first of the month in which they originally occurred. Activities can be deleted if they are not required in the current plan.

[COPY ACTIVITIES](#)

Looking for activities to plan for your students?

We have a directory of providers who might help with that.

[FIND AN ACTIVITY PROVIDER](#)

THE CAREERS & ENTERPRISE

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Tracker](#)
- [Copy current plan to next year](#)
- [Opening a shared Tracker plan](#)
- [Sharing Compass results](#)

# Download/print Tracker plan

Viewing and printing shared Tracker results.

**1** | Navigate to your Tracker dashboard and under 'Actions' you will find the option to 'Download'.

**2** | You will then be able to select the button 'DOWNLOAD EXCEL' which will download your activities into an Excel spreadsheet.

## Welcome to Tracker

### ABC International School





Tracker will help you to manage your institution's careers activities for each year. You can create careers plans that address any gaps in Benchmark performance, and build a top-notch careers provision.

If you need support with this tool, please [contact us](#) by email.


We understand ABC International School to be a school. If you think this is wrong, please contact us at [compasssupport@careersandenterprise.atlassian.net](mailto:compasssupport@careersandenterprise.atlassian.net)

## My plans

### Current plan

Institution	URN	Academic year	Last updated	Actions
ABC International School	141415	2019/2020	07/11/2019	 View/Edit plan
ABC International School	141415	2019/2020	31/10/2019	 Download
ABC International School	141415	2019/2020	10/10/2019	 Copy activities to next year's plan
ABC International School	141415	2019/2020	18/08/2019	

### Next year's plan

Institution	URN	Academic year	Last updated	Actions
ABC International School	141415	2020/2021	28/04/2019	

## Viewing and printing shared Compass results.



This is what the spreadsheet should look like.

Tracker plan - 28-11-2018 03\_07\_48

Home Insert Draw Page Layout Formulas Data Review View Tell me what you want to do

Calibri 22 A+ A- General Conditional Formatting Format as Table Cell Styles Insert Delete Format Sort & Filter Ideas

A1 The Careers and Enterprise Company

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q
1	The Careers and Enterprise Company																
2																	
3	School: ABC International School																
4	Urn: 141415																
5	Date: 28/11/2018																
6																	
7																	
8	Activities for the 2017/18 school year																
9																	
10	Benchmark	% achieved	Headings	Category	Activity Name	Start Date	End Date	Activity done	Pre 16	Year 16-18	19-24 (with School Lead	Total number	Notes				Evaluation notes
11	Gatsby benchmark 5	55%	Employer on	Employer m	Parity	29/11/2018	29/11/2018	No		250	250	Joe Bloggs	1				
12	Gatsby benchmark 3	83%	Pupil needs	Local author	YPM	04/12/2018	05/12/2018	No		250	250	Monnie Smit	1				
13																	
14																	
15																	
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36																	
37																	
38																	

Summary Provider Details Student Type Details +

90%

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Tracker](#)
- [Copy current plan to next year](#)
- [Opening a shared Tracker plan](#)
- [Sharing Compass results](#)

# Getting started with the Careers Partners Database

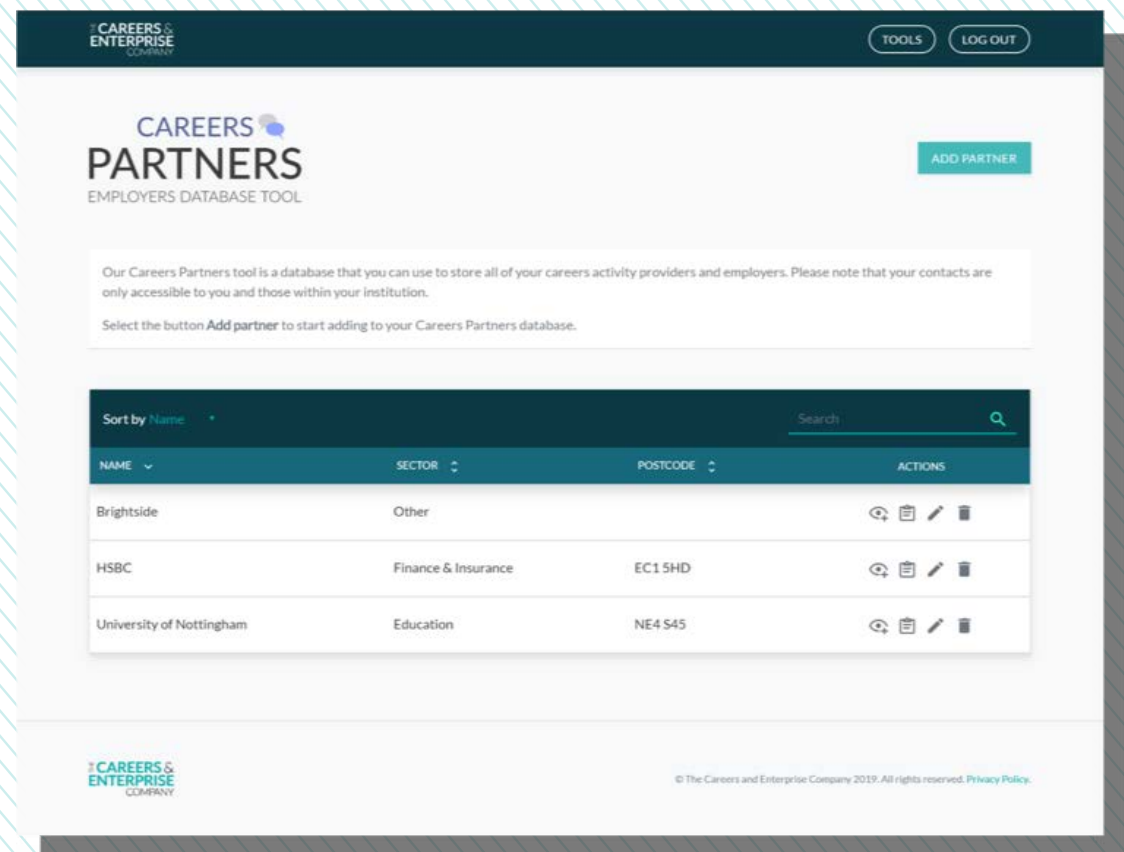
- The Careers Partners Database allows you to store contact information for careers partners in one central database, available to your institution only.
- It's available to any users within an institution who have **Admin** or **Editor** permissions.
- Currently, you can add partners to the database manually.
- We will be creating an excel upload function for the tool so that you can easily add your partners in the future.

The screenshot shows the 'CAREERS PARTNERS EMPLOYERS DATABASE TOOL' interface. At the top, there's a dark blue header with the 'CAREERS & ENTERPRISE COMPANY' logo on the left and 'TOOLS' and 'LOG OUT' buttons on the right. Below the header, the main content area has the 'CAREERS PARTNERS' title and 'EMPLOYERS DATABASE TOOL' subtitle. A teal 'ADD PARTNER' button is in the top right. A text box explains the tool's purpose and includes a link to 'Add partner'. Below this is a table with columns: NAME, SECTOR, POSTCODE, and ACTIONS. The table lists three entries: Brightside (Other), HSBC (Finance & Insurance, EC1 5HD), and University of Nottingham (Education, NE4 545). Each entry has icons for view, edit, and delete. A search bar and 'Sort by Name' dropdown are at the top of the table. The footer contains the 'CAREERS & ENTERPRISE COMPANY' logo and copyright information.

NAME	SECTOR	POSTCODE	ACTIONS
Brightside	Other		
HSBC	Finance & Insurance	EC1 5HD	
University of Nottingham	Education	NE4 545	

### Careers Leaders can benefit from being able to:

- Click “ADD PARTNER” near the top-right corner.
- Mandatory fields are Organisation Name and Organisation Type.
- Once the mandatory fields are filled, you’re free to save the careers partner and edit the listing later.
- The list is searchable and sortable. Use the search bar at the top to search and the buttons in the list header to sort by different criteria. You can also sort your careers partners by using the drop-down menu that reads ‘Sort by’.
- Click ‘view more’ (the eye) to expand the listing and view all available information about your partner.
- See activities you’ve planned with that partner by clicking ‘view activities’ (the clipboard). This option exists if you’ve listed this partner when creating an activity in Tracker.
- Edit a listing by clicking Edit this partner (the pencil) in the actions bar (click “SAVE” to save changes).
- Delete a partner from your database by clicking the Delete this partner (the bin icon).





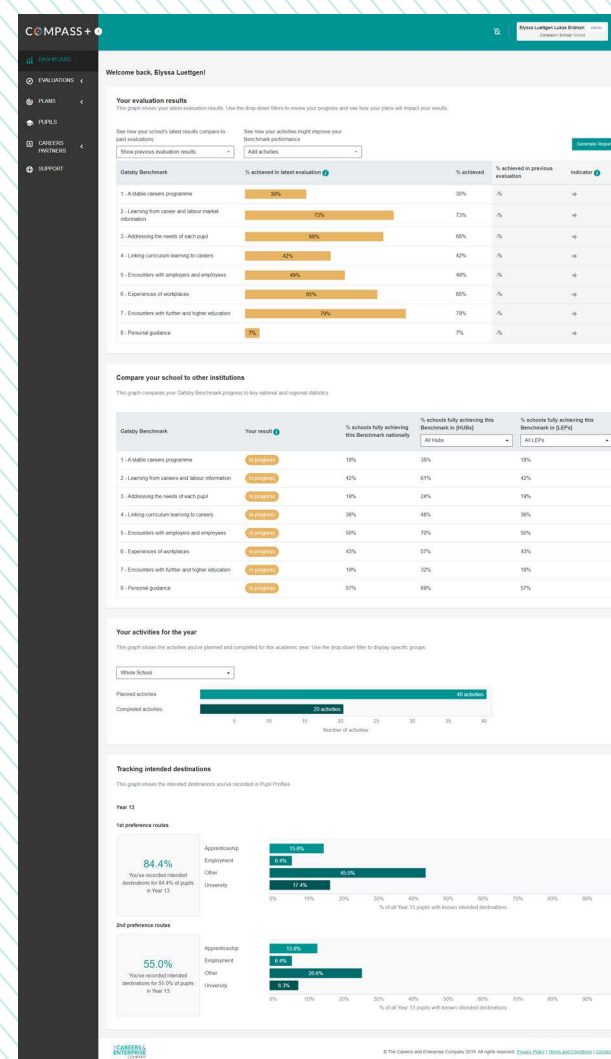
# Getting started with Compass+

Compass+ is a new tool to help you benchmark, manage, track and report on your school's careers programme.

Careers Leaders can benefit from being able to:

- **Save time and plan with ease** - quickly map out your careers programme for the academic year.
- **Be more strategic and targeted** - create custom cohorts so you can target relevant careers interventions to the students most in need.
- **Measure and monitor effectively** - create detailed reports and data visualisations to monitor performance.
- **Collaborate with colleagues** - encourage collaboration by allocating tasks, sharing contacts and allowing colleagues to contribute to your careers education programme.
- **Reach and build a wider network** - receive intelligent recommendations for activities and store your careers partners in one place.

For more information on how to get started with this new digital tool, please visit the Compass+ page on [our website](#).



# Colleges



# Compass for Colleges

Many colleges are now part of a merged group and will be operating separately or will come under one URN. There are also colleges who may have multiple sites and faculties who wish to complete an evaluation for each site/faculty. Once a user has identified the URN, the college tool now has the functionality to enable users to complete an evaluation for whole colleges, site, faculty or department.

Each one of those evaluations will be a separate evaluation in the list.

- 1 | Option to select “evaluate as a whole College, site, faculty or department”.

The screenshot shows the Compass Careers Benchmark Tool interface. At the top, there is a dark teal header with 'TOOLS' and 'LOG OUT' buttons. Below the header, the 'COMPASS CAREERS BENCHMARK TOOL' logo is displayed. A progress bar with 8 steps is shown: 1. Your institution (selected), 2. Stable careers programme, 3. Career information, 4. Individual needs, 5. Curriculum, 6. Employer encounters, 7. Workplace experiences, 8. Educational encounters, 9. Personal guidance, 10. Results. The main content area is titled 'Your College' and asks the user to select which part of the college they are evaluating. There are four radio button options: 'Whole college', 'A site', 'A faculty', and 'A department'. Below these options are 'Back' and 'NEXT' buttons, and a link 'Save and complete later'. On the right side, there is a sidebar with 'About Compass' information, including a description of the tool, contact links, and links to 'The Careers & Enterprise Company', 'The Gatsby Good Career Guidance Report', and 'Printable Compass for college questions (PDF)'. At the bottom, the 'THE CAREERS & ENTERPRISE COMPANY' logo and 'GATSBY' logo are displayed.

Many colleges are now part of a merged group and will be operating separately or will come under one URN. There are also colleges who may have multiple sites and faculties who wish to complete an evaluation for each site/faculty. Once a user has identified the URN, the college tool now has the functionality to enable users to complete an evaluation for whole colleges, site, faculty or department.

Each one of those evaluations will be a separate evaluation in the list.

**2** | If you don't select Whole College the next question will let you specify.

The screenshot shows the COMPASS CAREERS BENCHMARK TOOL interface. At the top, there is a dark teal header with 'TOOLS' and 'LOG OUT' buttons. Below the header, the COMPASS logo is displayed. A progress bar with 9 steps is shown: 1. Your institution (selected), 2. Stable careers programme, 3. Career information, 4. Individual needs, 5. Curriculum, 6. Employer encounters, 7. Workplace experiences, 8. Educational encounters, 9. Personal guidance, and 10. Results. The main section is titled 'Your College' and asks 'Please state the name of the site/faculty/department:' with a text input field. Below the input field are 'Back' and 'NEXT' buttons, and a link 'Save and complete later'. On the right side, there is a sidebar with 'About Compass' text, a 'Contact us by email' link, a 'More about Compass' link, and links to 'The Careers & Enterprise Company', 'The Gatsby Good Career Guidance Report', and 'Printable Compass for college questions (PDF)'. At the bottom, the logos for 'THE CAREERS & ENTERPRISE COMPANY' and 'GATSBY' are displayed.

Many colleges are now part of a merged group and will be operating separately or will come under one URN. There are also colleges who may have multiple sites and faculties who wish to complete an evaluation for each site/faculty. Once a user has identified the URN, the college tool now has the functionality to enable users to complete an evaluation for whole colleges, site, faculty or department.

Each one of those evaluations will be a separate evaluation in the list.

3

Followed by the number of students and so on.

### Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Compass](#)
- [Sharing Compass result](#)
- [View shared Compass result](#)

TOOLS LOG OUT

**COMPASS**  
CAREERS BENCHMARK TOOL

1 2 3 4 5 6 7 8 9 10

Your institution Stable careers programme Career information Individual needs Curriculum Employer encounters Workplace experiences Educational encounters Personal guidance Results

### Your College

How many learners do you have on roll in each of the following age groups?

Years	No. of students
Pre-16	<input type="text" value="0"/>
16-18	<input type="text" value="0"/>
19-24 (With EHCP)	<input type="text" value="0"/>

Back NEXT

Save and complete later

#### About Compass

Compass helps you to plan your careers and enterprise work by benchmarking your current activity.

[Contact us by email](#)

[More about Compass](#)

[The Careers & Enterprise Company](#)

[The Gatsby Good Career Guidance Report](#)

[Printable Compass for college questions \[PDF\]](#)

THE CAREERS & ENTERPRISE COMPANY GATSBY



# Viewing Compass results

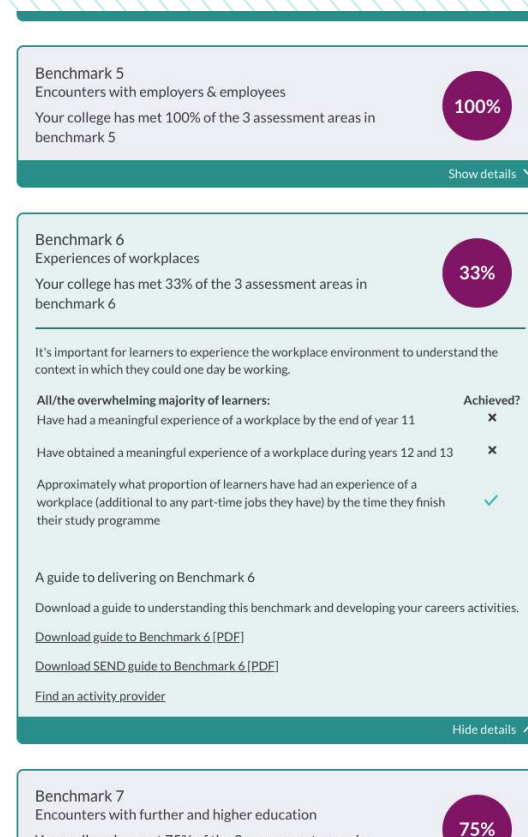
Once you've completed the Compass questionnaire it will produce your results which is marked against the Gatsby benchmarks.

**1** | Once you've completed the last question you will be prompted to view results.

Please note: the results below are based on College benchmarks, text breakdown will be different for schools.

## Related Articles:

- [What are Compass & Tracker](#)
- [Getting started with Compass](#)
- [Sharing Compass result](#)
- [View shared Compass result](#)



The Careers & Enterprise Company  
2-7 Clerkenwell Green  
Clerkenwell  
London EC1R 0DE

[careersandenterprise.co.uk](https://careersandenterprise.co.uk)

[For more information about our tools  
and support guidance go to our Support page.](#)