# Managing Cohorts

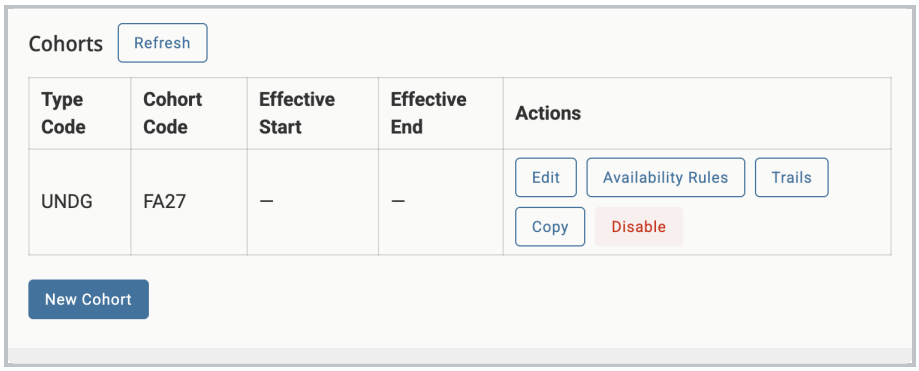
A Cohort is a group of students that starts under the same set of requirements, such as the students who entered in Fall 2027. Each Cohort has its own Trails, and students are placed in a Cohort so they see the right pathways. The Manage Cohorts page is where you create and maintain Cohorts, decide how students are placed in them automatically, manage the Trails in each Cohort, and assign students by hand.

### Security Note

The Curricula pages appear in the Connect25 left menu for users who have at least Read access to the **Manage Curricula** permission. To view or change Cohorts, Trails, availability rules, and student assignments on this page, you need full access to Manage Curricula and at least Read access to Student Engagement. Users with only Read access to Manage Curricula can open the menu item, but the system will not return Cohort data for them.

## Viewing the Cohorts Page

In the Connect25 left menu, select **Curricula** > **Manage Cohorts**.




The **Cohorts** list shows every active Cohort with these columns:

- **Type Code** — The kind of Cohort, such as UNDG.
- **Cohort Code** — The code for this Cohort, such as FA27.
- **Effective Start** and **Effective End** — The dates the Cohort applies, shown in your date format.
- **Actions** — The buttons described below.

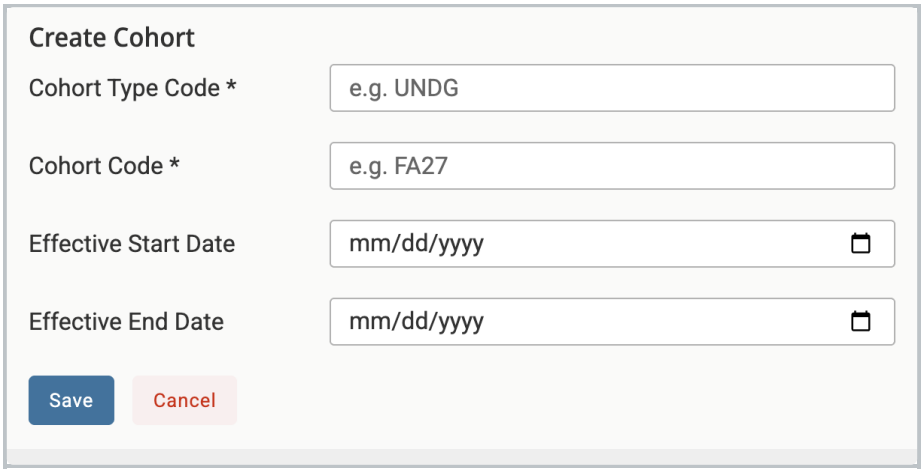
Click **Refresh** to reload the list. Disabled Cohorts do not appear in the list.

Each row has these buttons: **Edit**, **Availability Rules**, **Trails**, **Copy**, and **Disable**.

## Creating a Cohort

1. Click **New Cohort** below the list.

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2. In the **Create Cohort** form, enter:
    - **Cohort Type Code** (required) — The field shows "e.g. UNDG" as an example.
    - **Cohort Code** (required) — The field suggests a Fall code for next year, such as "FA" followed by the last two digits of the year.
    - **Effective Start Date** (optional)
    - **Effective End Date** (optional)
3. Click **Save**, or **Cancel** to close the form without saving.

## Editing a Cohort

Click **Edit** on a Cohort row. The **Edit Cohort** form has the same four fields as the create form. Change what you need and click **Save**.

## Copying a Cohort

Use **Copy** to start a new Cohort from an existing one, for example to prepare next year's Cohort.

1. Click **Copy** on the Cohort you want to copy. A section titled **Copy [cohort code]** opens and explains that it creates a new empty Cohort and copies the entire curriculum into it.
2. Enter the **Cohort Type Code** (filled in with the original's type code) and a new **Cohort Code**. Both are required.
3. Optionally enter an **Effective Start Date** and **Effective End Date**. These start with the original Cohort's dates.
4. Click **Copy Cohort**, or **Cancel** to close the section.

The new Cohort receives a copy of the original Cohort's availability rules and its curriculum catalog.

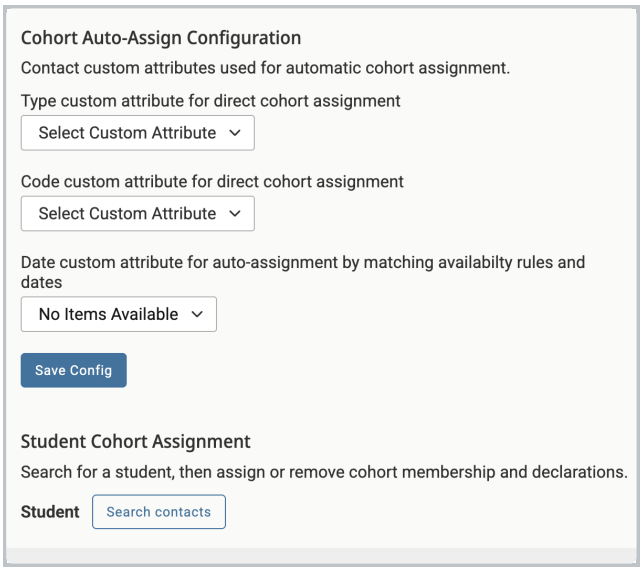
## Disabling a Cohort

1. Click **Disable** on the Cohort row.
2. Confirm the prompt. Note that this is a permanent action.

## Cohort Auto-Assign Configuration


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The **Cohort Auto-Assign Configuration** section tells Connect25 which contact custom attributes to read when placing students in Cohorts automatically. It applies to your whole system, not to a single Cohort. Each dropdown includes a **None** option.

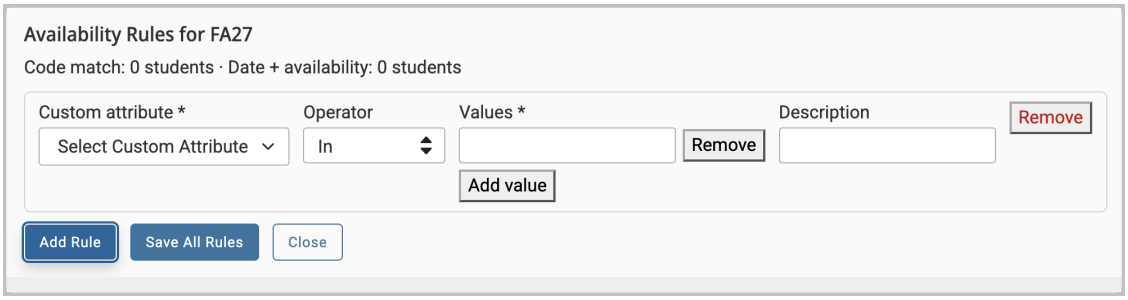



- **Type custom attribute for direct cohort assignment** — A text custom attribute on the contact that holds the Cohort Type Code.
- **Code custom attribute for direct cohort assignment** — A text custom attribute on the contact that holds the Cohort Code.
- **Date custom attribute for auto-assignment by matching availability rules and dates** — A date or date and time custom attribute on the contact. This one is used together with the availability rules described below.

Click **Save Config**.

## Availability Rules

Availability rules describe which students a Cohort includes, based on custom attributes on the student's contact record.




1. Click **Availability Rules** on a Cohort row. A section titled **Availability Rules for [cohort code]** opens.
2. When the system returns match numbers, the section first shows them in the form "Code match: [number] students • Date + availability: [number] students."
3. Click **Add Rule** to add a rule. For each rule, set:
    - **Custom attribute** (required) — The contact custom attribute to check.


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- **Operator** — Choose **In**, **Not In**, **Contains**, **Exists**, or **Not Exists**.
- **Values** or **Value** (required for In, Not In, and Contains) — For **In** and **Not In**, enter one or more values; use **Add value** to add another and **Remove** to delete one. For **Contains**, enter a single value. **Exists** and **Not Exists** do not use values.
- **Description** — Optional text describing the rule.

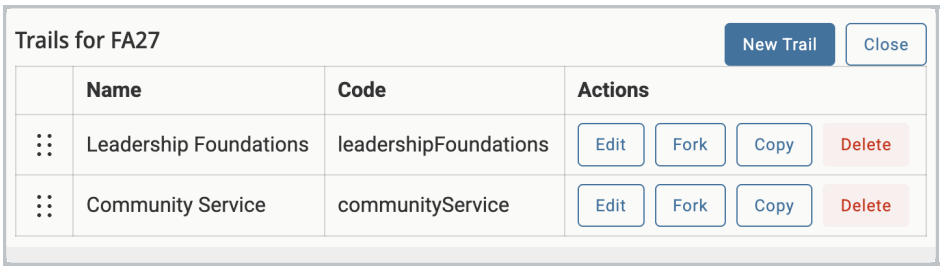
4. To delete a rule, click the **Remove** button at the bottom of that rule.
5. Click **Save All Rules** to save every rule in the list, or **Close** to close the section.

Each rule must have a custom attribute. Blank values are removed when you save. Changes are not saved until you click **Save All Rules**.

## Managing Trails in a Cohort

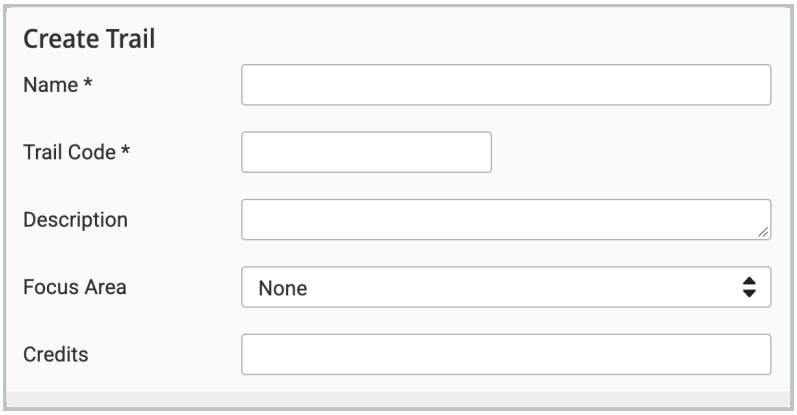
Click **Trails** on a Cohort row to open a section titled **Trails for [cohort code]**. It lists the Trails in that Cohort by **Name** and **Code**. If there are none, it shows "No trails in this cohort yet." Drag a row by its handle to change the order; the new order saves automatically. Click **Close** to close the section.

Each Trail row has these buttons: **Edit**, **Fork**, **Copy**, and **Delete**.




### Creating or Editing a Trail

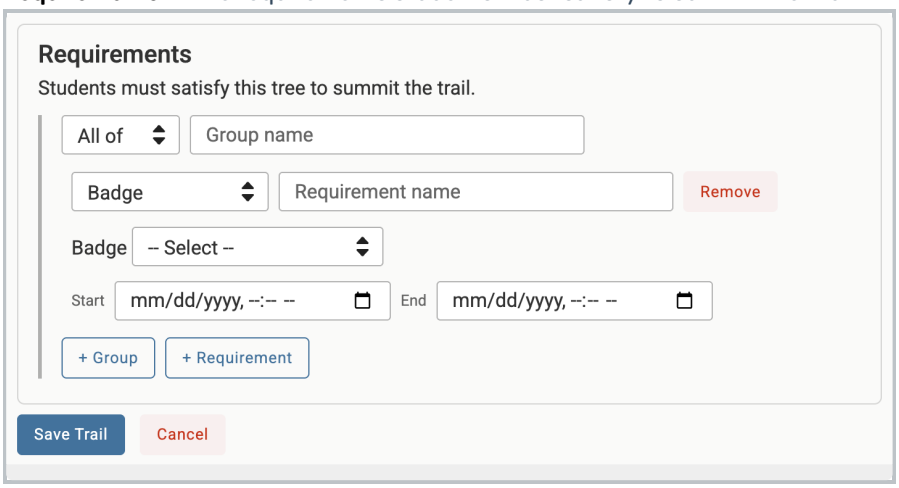
1. Click **New Trail**, or **Edit** on an existing Trail.




2. Fill in the form:
   - **Name** (required)


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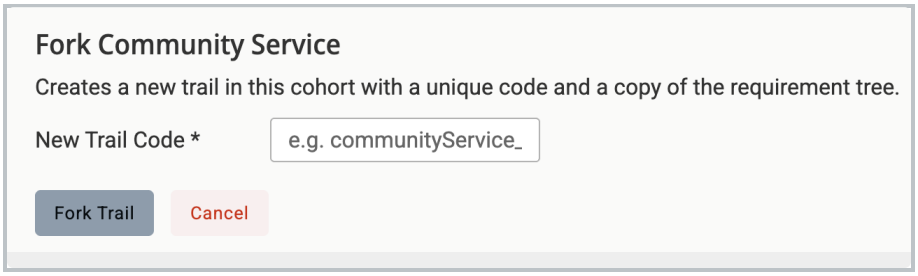
- **Trail Code** (required) — Must be unique within the Cohort. Suggestions from existing codes appear as you type. The code cannot be changed after the Trail is saved.
- **Description**
- **Focus Area** — Choose a Focus Area, or **None**. See Managing Focus Areas.
- **Credits** — A number of zero or more, in steps of 0.01.
- **Requirements** — The requirements students must satisfy to summit the Trail.




3. Click **Save Trail**, or **Cancel**.

## Forking a Trail

Click **Fork** to create a new Trail in the same Cohort with a copy of the original's requirements. Enter a unique **New Trail Code** and click **Fork Trail**.




## Copying a Trail to Another Cohort

1. Click **Copy** on the Trail.
2. In **Target Cohort**, choose the Cohort to copy into. Disabled Cohorts are not listed, and the current Cohort is marked "(this cohort)".
3. Under **Requirement trees**, choose one:
   - **Reuse matching requirements** — Available only when the target is a different Cohort.
   - **Copy all requirements** — The default.


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- **Copy without requirements**

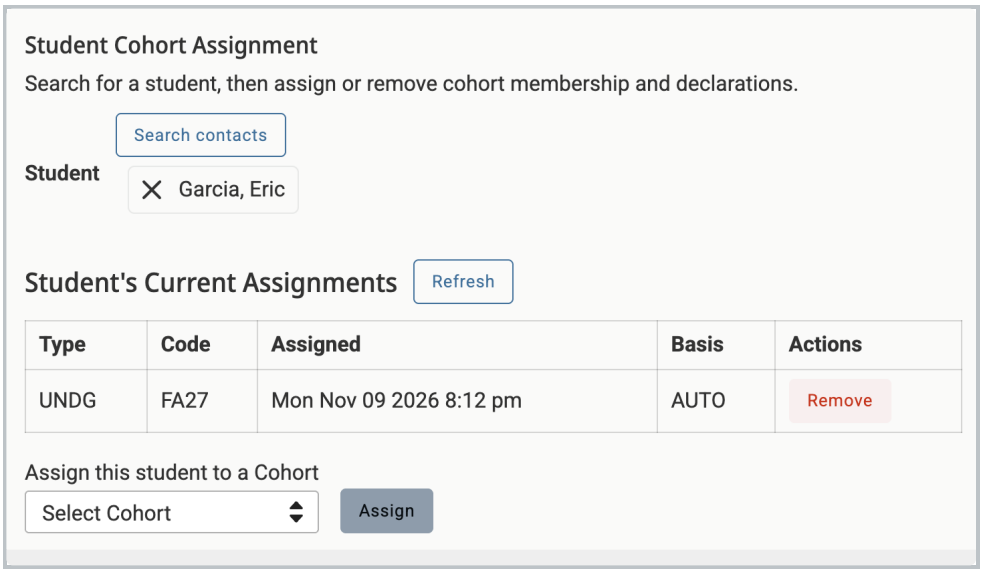
4. Click **Copy Trail**, or **Cancel**.

### Deleting a Trail

Click **Delete** and confirm. This action cannot be undone.

## Assigning Students to Cohorts

The **Student Cohort Assignment** section lets you place a single student in a Cohort and manage the student's Curricula declarations.

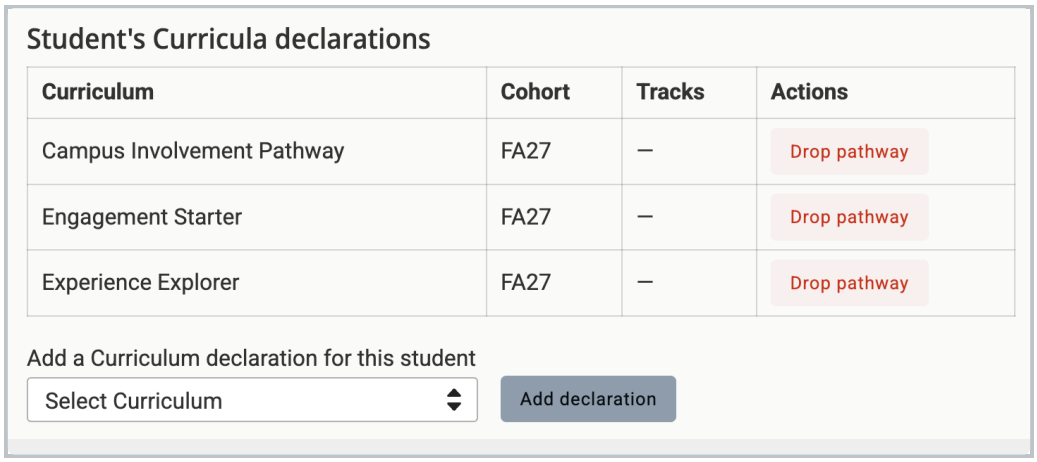



1. Click **Search contacts** and select a student. You can select one student at a time.
2. The **Student's Current Assignments** list shows the Type, Code, date Assigned, and Basis for each Cohort the student is in. If there are none, it shows "No cohort assignments for this student." Click **Refresh** to reload.
3. To add the student to a Cohort, choose one in **Assign this student to a Cohort** (shown as the code and type code) and click **Assign**.
4. To remove the student from a Cohort, click **Remove** on its row and confirm.

### Student Curricula Declarations

Under **Student's Curricula declarations**, you can see each Curriculum the student has declared, the Cohort, and the Tracks selected. Declarations that were dropped are shown as "Dropped."


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- To add a declaration, choose a published Curriculum in **Add a Curriculum declaration for this student**, select any Tracks that apply, and click **Add declaration**. Tracks that cannot be combined with a Track you have already selected are unavailable.
- To change Tracks on an active declaration, select or clear the Track checkboxes and click **Save tracks**. If you are removing a Track, you are asked to confirm.
- To drop a Curriculum, click **Drop pathway** and confirm.


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