**Compass FAQs**

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**Students and Student Services**

**How to Add a New Student**

1.       At the **Student Information** **(Home)** page, in the top section, above the listing of all students there is a blue button that says **New Student**

2.       Click **New Student**

3.       Enter information on the new student. Required information will be marked with a red underline. New student will not save unless all required information has been entered

4.       Click **Save**

**How to Make a Student Inactive**

When a student leaves your school, you will need to make them inactive in the system. This is done by entering an end date in the school history tab.

1.       Go to the **Student Information** **(Home)** page

2.       Select the student

3.       Choose the **School History** tab

4.       Click **Edit**

5.       Choose the listing of the school the student is currently enrolled...should be your school, this school year...click **Edit**

6.       Enter the end date. An entry in the end date field is what indicates to the system that the student is inactive, even if the end date is in the future.

7.       Click **Update**

**How to Search an Inactive Student**

Students with an end date in their current school history entry will be recognized by the system as inactive.

1.       Go to the **Student Information** **(Home)** page.

2.       Select the **Inactive** or **All** radial button. If you are searching for an inactive student without one of these options selected the student will not appear in your search

3.       Select the appropriate filters to search for the student

4.       Click **Search**

**How to Reactivate a Student**

1.       Go to the **Student Information** **(Home)** page.

2.       To find an inactive student search for the student using appropriate filters, with the **Inactive** or **All** radial button selected. If you are searching for an inactive student without one of these options selected the student will not appear in your search

3.       Once you have found the inactive student, Select the student

4.       Choose the **School History** tab

5.       Click **Edit**

6.      “<li>” + “Click “ + “<b>” + “**Add New Record” + “</b> + “** near the top left of the screen. Even if the student is being reactivated at the same school, enter a new entry at the same school with the new start date” + “</li>”

7.      “<li>” + “ Enter the required information, indicated by red underlining. Be sure that there is “ + “<b>” + “**NO END DATE” + “</b> + “** included in the current entry. If there is an end date included, the student will be recognized as inactive, despite of the date in the end date field” + “</li>”

8.       “<li>” + “ Click “ + “<b>” + “**Update” + “</b> +**“</li>”

**How to Add a Student Group**

1.       From the **Student Information** **(Home)** page, select the **Student Groups** link under the **Students** section on the right.

2.       Enter the **Name** of the Student Group and the **School.**

3.       Click **Enter**. Your student group has been added.

**How to Add a Student to an Existing Student Group**

1.       From the **Student Information** **(Home)** page, select the **Student Group** link under the **STUDENTS** section on the right.

2.       A list of existing student groups will be listed in blue.

3.       Chose the student group you would like to add the students to. Click **Edit.**

4.       Next choose the grade of the students who you would like to add to your list. Students will appear in the unassigned box.

5.       Assign students to the group by selecting the student, then moving them to the **Assigned** box by clicking the single arrow. Or, move all students by selecting the double arrow.

6.       Click **Save.**

7.       A red notification will appear that the selected students have been successfully added to your group.

**How to Enter Services to Students**

1.       From the **Student Information** **(Home)** page, select the **Student Services** link under the **STUDENTS** section on the right.

2.       Select the activity name from the drop down.

3.       Enter the number of hours, date of the activity and any additional information.

4.       Select the school in which the students who participated attend. (If you only have school level access, you will not need to select the school, as they will already be selected for you.) You may also filter by grade or student group if needed.

5.       Under the **Unassigned** box, all students in the school, grade, or student group you have selected will appear.

6.       To move over ALL students in the **Unassigned** box, click the double arrow.

7.       To move over only selected students, click the student's name followed by the single arrow. You may also select multiple students by holding down the Ctrl key on your keyboard (command for MAC users) and selecting students.

8.       Students who participated in the service/activity will now be located in the **Assigned** box.

9.       Click **Save.**

10.   A red notification will appear that your service has been entered successfully. If there is an error, the system will provide notification.

**How to Enter Services to Student Groups**

1.       From the **Student Information** **(Home)** page, select the **Student Services** link under the **STUDENTS** section on the right.

2.       Select the activity name from the drop down.

3.       Enter the number of hours, date of the activity and any additional information.

4.       Select the school in which the students who participated attend. (If you only have school level access, you will not need to select the school, as they will already be selected for you.) You may also filter by grade or student group if needed.

5.       Select the group of students who participated in the service. See directions on how to add student groups to set this up.

6.       Once you select the group, all of the students assigned to that group will automatically appear in the **assigned** box.

7.       If any students did not attend that particular activity, you can move them back to the **unassigned** box. To move over only selected students, click the student's name followed by the single arrow. You may also select multiple students by holding down the Ctrl key on your keyboard (command for MAC users) and selecting students.

8.       Click **Save**

**How to Edit or Update a Student Service Entry**

1.       From the **Student Information** **(Home)** page, select the **Service Search/Edit** link under the **STUDENTS** section on the right.

**To Edit Individual Entries**

1.       Use the filters to search for the original entry that needs to be edited

2.       Once the entry has been found, click **Edit**, found to the left of the entry

3.       Make any appropriate changes to the entry

4.       Click **Update**

**To Batch Edit Entries**

1.       Use the filters to search for the original entries that need to be edited. Use as many filters as necessary so that only the entries to be updated are included in the results window. The system will tell you how many entries were found

2.       Scroll down to the section that says Update Entries in Batches

3.       Check the box next to the information within the entry you would like to edit (i.e. hours, name, etc). Multiple updates can be made at one time.

4.       Enter the updated information into the fields that have been checked

5.       Click **Update**

6.       The system will ask if you want to update the entries, click **ok**

7.       The system message will appear that the entries have been updated

**Parents and Parent Services**

**How to Add a New Parent and Assign to Student**

1.       At the **Student Information** **(Home)** page, click on the student whose parent you wish to add.

2.       Select the **Parents** tab

3.       Scroll to the bottom and click **Edit**, then click **Assign**, then **New**

4.       Enter the parent's information

5.       Click ok to assign the parent to the student

6.       Click close to exit the parent list

7.       Click close to exit the parent information window

Once you have entered all of the parents, you can begin to enter services to parents, just as you would your student services.

**How to Assign an Existing Parent to a Student**

1.       At the **Student Information** **(Home)** page, click on the student whose parent you wish to add.

2.       Select the **Parents** tab

3.       Scroll to the bottom and click **Edit**, then click **Assign**

4.       Select school to filter the list of parents. Choose existing parent from the **Parent** drop down box.

5.       Click **Assign** to assign the parent to the student

6.       Click close to exit the parent list

7.       Click close to exit the parent information window

**How to Enter Services to Parents**

1.       From the **Student Information** **(Home)** page, select the **Parent Services** link under the **PARENTS** section on the right.

2.       Select the activity/service name from the drop down.

3.       Enter the number of hours, date of the activity and any additional information.

4.       Select the school in which the students who's participated attend. (If you only have school level access, you will not need to select the school, as they will already be selected for you.) You may also filter by grade, student group, student name or parent name if needed.

5.       Under the **Unassigned** box, all parents with students in the school, grade, or student group you have selected will appear.

6.       To move over ALL parents in the **Unassigned** box, click the double arrow.

7.       To move over only selected parents in the **Unassigned** box, click the parent's name followed by the single arrow. You may also select multiple parents by holding down the Ctrl key on your keyboard (command for MAC users) and selecting parents.

8.       Parents who participated in the service/activity will now be located in the **Assigned** box.

9.       Click **Save.**

10.   A red notification will appear that your service has been entered successfully. If there is an error, the system will provide notification.

**How to Edit or Update a Parent Service Entry**

1.       From the **Student Information** **(Home)** page, select the **Service Search/Edit** link under the **Parents** section on the right.

**To Edit Individual Entries**

1.       Use the filters to search for the original entry that needs to be edited

2.       Once the entry has been found, click **Edit**, found to the left of the entry

3.       Make any appropriate changes to the entry

4.       Click **Update**

**To Batch Edit Entries**

1.       Use the filters to search for the original entries that need to be edited. Use as many filters as necessary so that only the entries to be updated are included in the results window. The system will tell you how many entries were found

2.       Scroll down to the section that says Update Entries in Batches

3.       Check the box next to the information within the entry you would like to edit (i.e. hours, name, etc). Multiple updates can be made at one time.

4.       Enter the updated information into the fields that have been checked

5.       Click **Update**

6.       The system will ask if you want to update the entries, click **ok**

7.       The system message will appear that the entries have been updated

**Instructor and Instructor Services**

**How to Add an Instructor**

1.       From the **Student Information** **(Home)** page, select the **Add/View Instructors** link under the **Instructors** section on the right

2.       Enter the required information for the instructor. Provide as much detail as possible including Instructor ID, discipline and service participation information

3.       Click **Save**. Your instructor has been added

**How to Enter Services to Instructors**

1.       From the **Student Information** **(Home)** page, select the **Training** link under the **Instructors** section on the right

2.       Enter details about the training including name, date and number of hours

3.       Select the school in which the instructors teach. (If you only have school level access, you will not need to select the school, as they will already be selected for you.)

4.       Under the **Unassigned** box, all instructors in the school you have selected will appear.

5.       To move over ALL instructors in the **Unassigned** box, click the double arrow.

6.       To move over only selected instructors in the **Unassigned** box, click the instructor's name followed by the single arrow. You may also select multiple instructors by holding down the Ctrl key on your keyboard (command for MAC users) and selecting instructors.

7.       Instructors who participated in the training will now be located in the **Assigned** box.

8.       Click **Enter.**

9.       A red notification will appear that your service has been entered successfully. If there is an error, the system will provide notification.

**User Information and Settings**

**How to Add New Users to Compass**

To enter a new Compass user, you will need the following information from the user - First name, last name and e-mail address.

1.       From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right

2.       Select **Go** next to **My Compass**

3.       Within **My Compass** click **Go** next to **Add User**

4.       Complete the requested information. CoBro Consulting recommend using the first letter of the first name, and last name as the user id.

**How to Inactivate a User**

1.       From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right

2.       Select **Go** next to **My Compass**

3.       Within **My Compass** click **Go** next to **Manage User**

4.       Scroll down to the section called **User Information**

5.       Find the user you wish to inactivate and click **Edit**

6.       Once editing is engaged, click the box to lock/inactivate the user

7.       Click **Update**

**How to Unlock a User**

In the case that a user attempts to enter an incorrect password too many times, the system will automatically lock/inactivate their user login information. A system administrator can unlock/reactivate the user by following the steps below.

1.       From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right

2.       Select **Go** next to **My Compass**

3.       Within **My Compass** click **Go** next to **Manage User**

4.       Scroll down to the section called **User Information**

5.       Find the user you wish to unlock/reactivate and click **Edit**

6.       Once editing is engaged, uncheck the box to unlock/reactivate the user

7.       Click **Update**

**How to Retrieve Your Password**

**1.** From the **Login** page, select the **Forgot Password** link in the top left corner of the page

2.       Enter your **user name** and the system will send your password to the email address that is stored in the system.

**How to Change Your Password**

1.       From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right

2.       Select **Go** next to **Change My Password**

3.       Enter your current password, and new password twice

4.       Click **Change Password**

**System General Information and Settings**

**How to Upload a File**

1.       From the **Student Information (Home) page**, select the **Data Center** link under the **System Tools** section on the right

2.       Select **Go** next to **Upload Site**

3.       Enter your user information on the login page. This information was provided to you by CoBro Consulting. If you do not have this login information, please contact customer support at support@cobroconsulting.com.

4.       Once you log in you will see the main upload page. From here you have two options for uploading your data.

5.       After a successful upload by either option, you will receive an email conformation that CoBro Consulting has received your file.

Option A, Drag and Drop: The easiest option and has the least amount of steps. Simply drag the file you wish to upload, just like you would drag a document into an email. Once the file has been imported to the website, you will see it in a list below the drag and drop box. From here you can confirm your upload or cancel. If you selected the wrong file you can always abort the upload, by selecting cancel (highlighted in red below). If you wish to continue with the upload, choose start (highlighted in green).Once the file has been uploaded, you can upload additional files or delete your previous uploads.

Option B, Select Files: By clicking on the ‘Select Files’ button, you can upload files directly from your computer. Once you have selected the file(s) you want to upload. Click open. After the files have been uploaded to the site, you can select the same options as in the Drag and Drop upload option.

**How to Create a School, District or Region**

1.       From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right

2.       Select **Modify** next to **District, School or Region**

3.       Within type the name of the new district, school or region

4.       Click **Enter**

**How to Assign Schools to Districts**

District must be in the system before schools can be assigned.

1.       From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right

2.       Select **Modify** next to **School-District Assignments**

3.       At the top, select the district you would like to assign schools to. All schools within your system will appear in the **Unassigned** box.

4.       To move over and assign ALL schools in the **Unassigned** box, click the double arrow.

5.       To move over only selected schools in the **Unassigned** box, click the school name followed by the single arrow. You may also select multiple schools by holding down the Ctrl key on your keyboard (command for MAC users) and selecting the school, then clicking the singe arrow.

6.       Schools to be assigned to the district will now be located in the **Assigned** box.

7.       Click **Save**.

**How to Activate Buttons/Icons If They are Not Working**

For Internet Explorer Users ONLY

If you click on an icon or button and it does not work in Compass, you may check the compatibility of your browser. You can enable compatibility view in IE in order to ensure compatibility of your browser.

1.       To enable this Icon on Internet Explorer 9, click on the "torn page" icon in the URL bar.

2.       The icon will look like this: C:\Users\~\Desktop\CoBro Website\Compass FAQs - Updated 12.2.2013_files\image002.jpg

3.       The icon should go from grey to blue when activated. All compass buttons will reactivate.

**How to Assign Class Level**

Class level identifies courses that are advanced and non-advanced. The level categories include Non-Advanced, Advanced, IB, Honors, AP, College. These level identifiers are determined by each program's unique district or school classifications.

1.       From the **Student Information (Home) page**, select the **Data Center** link under the **System Tools** section on the right

2.       Select **Go** next to **Class Level**

3.       Select the school in which you will be assigning classes for. When a school is selected, every class that has been submitted via student transcripts will be listed in the classes box.

4.       You may also filter by grade level.

5.       Select **No Level** from the **Course Level** drop down. This will pull all courses that do not currently have a level assigned to them.

6.       Classes with no level assigned will appear in the **Classes** box.

7.       Decide on the first category you will assign, for example, **Advanced**.

8.       Select and move any advanced courses to the **Assign Level** box. You will assign course levels JUST as you would assign students to a service within COMPASS. To move over only selected courses, click the course name followed by the single arrow. You may also select multiple courses by holding down the Ctrl key on your keyboard (command for MAC users) and selecting courses.

9.       Courses to be assigned **Advanced** will now be located in the **Assign Level** box.

10.   Select the level to assign to the courses from the **Level to Assign** drop down.

11.   Click **UPDATE**. Now your courses have been assigned a level.

12.   Repeat this process with each level, ensuring there are no classes left in the **No Level** category. All courses should have a level assigned to them.

Course Level Review and Verification

1.       **Be sure to check class level assignment after each upload of student grades and transcripts.** This will ensure that class levels are always up-to-date and ready for APR.

2.       To periodically review correct course assignment, please review via the **Class Level Report**. This can be found at the bottom of the page where class assignments are made. The Class Level Report will list each course in the system and the related level.

3.       To verify that courses have been assigned to the correct category, or to update a class that is assigned the incorrect class level, select any class level from the **Class Level** drop down. Courses assigned to that level (for example **Non-Advanced**) will appear in the **Classes** box. If any classes appear in the **Classes** box, that should not be assigned the level that you selected in the **Course Level** drop down, you can reassign those classes by following steps 3-6 above.

**How to Assign Class Type**

Assigning a class type will identify courses within specific class categories listed on APR. For example, many schools may have a course called MATH 1. However, this course actually covers Pre-Algebra, which needs to be identified in the APR. Assigning a class type will categorize all courses correctly for submission on the APR. The class Type categories include: No Type, Pre-Algebra, Algebra 1, Geometry, Algebra 2, Calculus, Chemistry, Physics, Trigonometry, Pre-Calculus, Biology, Math - Other, Science - Other, English/Language Arts, and N/A. All courses must be assigned a class type, so if the course does not fit into one specific category, it should be assigned N/A.

1.       From the **Student Information (Home) page**, select the **Data Center** link under the **System Tools** section on the right

2.       Select **Go** next to **Class Type**

3.       Select the school in which you will be assigning classes for. When a school is selected, every class that has been submitted via student transcripts will be listed in the classes box.

4.       You may also filter by grade level.

5.       Select **No Type** from the **Course Type** drop down.

6.       Classes without a type assigned will appear in the **Classes** box.

7.       Decide on the first category you will assign, for example, **Pre-Algebra**.

8.       Select and move any advanced courses from the **Classes** box to the **Assign Type** box. You will assign course levels JUST as you would assign students to a service within COMPASS. To move over only selected courses, click the course name followed by the single arrow. You may also select multiple courses by holding down the Ctrl key on your keyboard (command for MAC users) and selecting courses.

9.       Courses to be assigned **Pre-Algebra** will now be located in the **Assign Type** box.

10.   Select the level to assign to the courses from the **Type to Assign** drop down.

11.   Click **UPDATE**. Now your courses have been assigned a level.

12.   Repeat this process with each level, ensuring there are no classes left in the **No Type** category. All courses should have a type assigned to them.

Course Level Review and Verification

4.       **Be sure to check class type assignment after each upload of student grades and transcripts.** This will ensure that class levels are always up-to-date and ready for APR.

5.       To periodically review correct course assignment, please review via the **Class Type Report**. This can be found at the bottom of the page where class assignments are made. The Class Type Report will list each course in the system and the related type.

6.       To verify that courses have been assigned to the correct category, or to update a class that is assigned the incorrect class type, select any class type from the **Class Type** drop down. Courses assigned to that level (for example **Algebra 1**) will appear in the **Classes** box. If any classes appear in the **Classes** box, that should not be assigned the level that you selected in the **Course Type** drop down, you can reassign those classes by following steps 3-6 above.