# 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 required information. Required information is **First Name**, **Last Name**, and **Email Address**. Select level of access.
5. Click **Add**.
6. A system notification will appear that the new user has been added. The user will receive their log-in information to the email address provided within 24 hours.

## 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 **My Compass**.
3. Select **Go** next to **Change My Password**.
4. Enter your current password, and new password twice.
5. Click **Change Password**.

## How to Add Announcements

The Announcements feature allows users with administrative status to post messages on the Compass Login screen. Posted announcements are visible to all users.

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. Select **Go** next to **Announcements**.
4. Type the announcement into the space provided under the Add Announcement heading.
5. Click **Add**. A confirmation message will appear to inform you the announcement has been added successfully.

If text is already posted.

1. Click **Reset** to clear existing text in the window and type a new announcement.
2. To modify an announcement, click EDIT to the left of the message you want to modify.
3. Select the **Visible** option to make the announcement visible to Compass users, or unselect the Visible option to remove the announcement from the Login page.
4. Click **Update** after the desired changes have been made.

## How to Email All Users

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. Select **Go** next to **Email to Users**.
4. Select user email addresses from the Region, District, or School filters provided. Additional email addresses can be added in the box provided.
5. Add an email subject, and message to the body of the email.
6. Click **Send**.
7. A red system notification will appear to confirm that the email was sent successfully.

# 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, Region, Or District

Remove from this section. Added to Administrator section below, in red.

## How to Assign a School to a District

Remove from this section. Added to Administrator section below, in red.

## 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: .
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

1. **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.
2. 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.
3. 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.

# Administrator System Tools

## How to Add a Student Service to Student Service Category Dropdown

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Student Services**.
3. Enter information under **Add Student Service Type** for the new student service.
4. Click **Enter**.

## How to Add a Student Service Subcategory to Service Subcategory Dropdown

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Student Services Subcategory**.
3. Choose the service that the subcategory will apply to.
4. Enter the name of the subcategory under **Add Subcategory**.
5. Click **Enter**.

## How to Add a Student Group from System Utility

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **Student Group**.
3. Enter the name of the group and the school under **Add Group**.
4. Click **Enter**.

## How to Add a Parent Service Category to Parent Services Dropdown

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Parent Services**.
3. Enter information under **Add Parent Service Type** for the new parent service.
4. Click **Enter**.

## How to Add a Parent Service Subcategory to Parent Services Subcategory Dropdown

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Parent Services Subcategory**.
3. Choose the service that the subcategory will apply to.
4. Enter the name of the subcategory under **Add Subcategory**.
5. Click **Enter**.

## How to Add a Parent Group from System Utility

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **Parent Group**.
3. Enter the name of the group and the school under **Add Group**.
4. Click **Enter**.

## How to Add an Instructor Discipline

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **Discipline**.
3. Enter the name of the discipline under **Add Discipline**.
4. Click **Enter**.

## How to Add Training To Instructor Services Dropdown

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Staff Development Training**.
3. Enter the name of the instructor training under **Add Training**.
4. The order of the dropdown list may also be arranged by using the **Up** or **Down** buttons to the left of each training name under the heading **Adjust Order**.
5. Click **Enter**.

## How to Create a School, District, Region, or College

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, Region**, or **College.**
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 Assign Districts to Regions

Region 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 **District-Region 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 Add a Scholarship or Financial Aid Type

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Scholarship Financial Aid Type**.
3. Under **Add Scholarship and Financial Aid Type**, add the title of the scholarship or financial aid in the box provided.
4. Click **Enter**.

## How to Add/Edit Class Information

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Class Information**.
3. Under **Add Class**, enter the **Title**, **Level**, **APR category**, number of **credits/units**, and **school** information for the class.
4. Click **Enter**.

## How to Export Data into an Excel or Text File

1. From the **Student Information (Home) page**, select the **Data Center** link under the **System Tools** section on the right.
2. Click **Go** next to **Data Export**.
3. Select the table name for the data you want to export. Data elements available in the selected table will appear in the selected box.
4. Unselect any elements you do not want to appear in your data export by highlighting the data elements and clicking the single arrow.
5. Click **Export as Excel** or **Export as Text**.
6. The data will download to your computer as the file type you determined.

## How to Change a Student's Primary ID

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Modify** next to **Change Primary Student ID**.
3. Under **Change Primary Student ID** select the school year, school where the student attends, and the student's name. The students existing Primary ID will appear.
4. Add the new ID in the **New Primary ID** box.
5. Click **Modify**.

## How to Add a School Year End Date

End dates are added to school history to indicate a student has completed a school year, and rolled over to a new school year. Do NOT add end dates until the school year is completely over and you are ready to work in a new school year. Students with end dates will appear as inactive in the school year indicated.

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **End Dates**.
3. Under **End Dates** select the school year in which the end date will apply, the school, and the end date.
4. Click **Ok.**

## How to Add an End Reason for Student School History

End reasons are required when a student is made inactive and given an end date in the system.

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **End Reason**.
3. Under **End Reason** add a new end reason in the box provided.
4. Click **Save.**

## How to Review User Status

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **User Status**.
3. Enter information of the user.
4. Click **Search.**

## How to Resend a Confirmation Email to a New User

If a system invite has been sent to a user and the user cannot locate the email, a new email can be re-sent.

1. From the **Student Information (Home) page**, select the **System Utility** link under the **System Tools** section on the right.
2. Click **Go** next to **Resend Confirmation Mail.**
3. If a user has not been activated, the username will be listed in the box.
4. Click **Resend.**