Tutorial for New Users- Orientation to Comply Template

How To – To create this item on your portal, follow the directions below.

1) Log into Comply
2) Supervision Management → Templates
3) Search for and locate the Template called *Tutorial for New Users- Orientation to Comply Template*→ View
4) From the item's detail page, select Actions → Duplicate
5) From the edit compliance item page, customize the item to the unique needs of your school district.
    a. Title – edit as needed
    b. Description – edit as needed
    c. Compliance Cycle Type – leave as Item Timeline
    d. Start Date and End Date – edit as needed
    e. Instructions – edit as needed
    f. Person of Contact – add person(s) of contact
    g. What is required of the user? – leave as is (box checked for Completed Questionnaire)
    h. Reminders – edit as needed
    i. Questionnaire – leave as is
    j. Resources – leave current links
    k. Recurrence – ignore / not applicable
    l. Approval Stages – leave as is / not applicable
    m. Tags – add tag as needed
    n. Act 48 – leave as is / not applicable
6) Save, Publish, and Close the item.
7) From the Roster section, click the blue Add Users icon.
    a. There are three basic ways to add users.
        - Search for and add users by utilizing the blue Get All Users button
        - Search for and add users individually by utilizing the search field in the left hand column
        - Search for and add users by utilizing Groups
    b. Once added, users will be assigned to the item, and they will receive an email. Included in the email is their due date, person of contact, instructions, and a link back to the item within Comply.