

# Exam Administrator (Proctor) Guide for Compass Cloud



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## **Guide Summary**

This guide outlines the processes and best practices for scheduling and administering exams with Compass Cloud as an Exam Administrator (Proctor). Please note that Compass Cloud is <u>not</u> a remote proctoring solution like Exams from Home and is only intended for use <u>in-person</u> at a Certiport Authorized Testing Center (CATC) with the Exam Administrator (Proctor) and Test Candidate in the same room.

Compass Cloud was developed as a way to eliminate the need of setting up and maintaining all the software required to perform local (native) delivery with Compass for Windows. With Compass Cloud, the exam software, locally installed software required for Live-in-the-Application delivery, and the exam content are all stored in the cloud, so you will only need to download and install the Compass Cloud app on every desired testing workstation, then schedule and confirm your first session through our website.

## **Technical Requirements**

First, it is important to understand that Compass Cloud exists in two distinct forms:

- **Web-Based Dashboards:** These are used to schedule and administer exams and are accessed by logging in to our website at <a href="www.certiport.com">www.certiport.com</a>. Only Exam Administrators (Proctors) and Organization Administrators will use these features. The administration dashboard does not have a way to view the Test Candidate's desktop, nor does it have any direct communication features (i.e. chat).
- **Desktop Application:** This will need to be installed on every testing workstation. Only Test Candidates will use the desktop app.

## <u>Dashboards - Exam Administrator (Proctor) Requirements:</u>

The Exam Administrator (Proctor) only needs a device with a large enough screen resolution to adequately view the scheduling calendar and the exam administration dashboard through a browser.

- Laptop or Desktop (recommended), tablets or other mobile devices
- The preferred internet browser is Chrome. Edge and Safari are also supported
- High-speed internet

#### **Desktop App - Test Candidate Requirements:**

- Laptop or Desktop with Windows 10, Windows 11, or Mac OSX Sierra 10.12 or higher
- Chromebook with a current operating system (OS)
- Local Admin Rights to deploy the installer file
- The language of the OS on the testing workstation must match the exam language of the scheduled session
- Keyboard, mouse, and monitor with a recommended minimum screen resolution of 1280 x 800
- The preferred internet browser is Chrome. Edge and Safari are also acceptable
- A bandwidth download speed of at least 10Mbps per testing workstation



## **Downloading and Installing the Desktop Application**

To obtain the installer file, navigate to <a href="www.certiport.com">www.certiport.com</a> and log in. Change your role to Organization Administrator or Member, hover over the **Exam Delivery** tab and click on the dropdown for **Compass Cloud: Download & Installation**. Compass Cloud is currently available for Windows, Mac, or Chromebooks.

- 1. On the download page, locate the colored icons for your desired delivery operating system and follow the install instructions located within each section.
- 2. Download the file and move it to your desktop (Win/Mac) to install. Chromebook devices will use an app that needs to be installed from the Google Play Store.
- 3. Repeat the process on every testing workstation. The desktop icon looks like this  $\rightarrow$

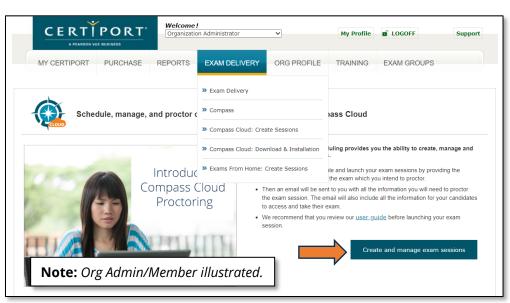
#### **Mass Deployment (Windows only):**

For advanced users familiar with scripting and Active Directory, the installer file can be mass deployed in a Windows environment. For detailed instructions on mass deployment, see the <u>user guide</u>.

## **Getting to know the Calendar Dashboard Tool**

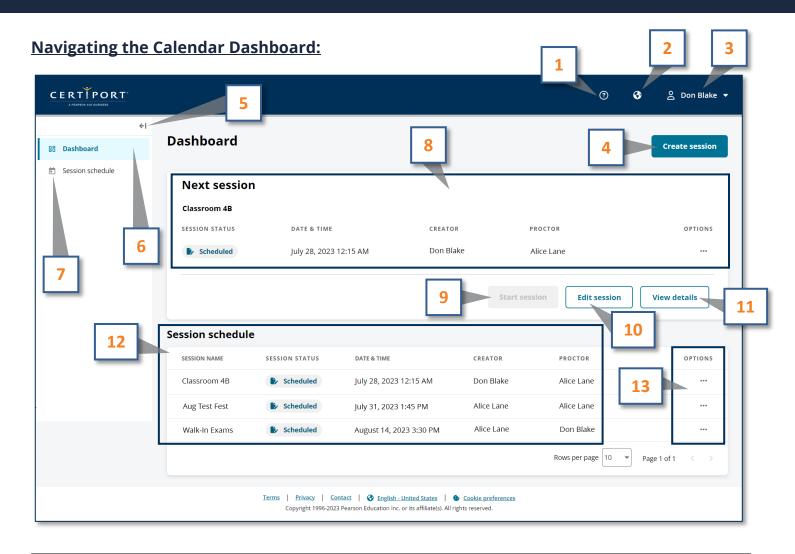
To access to the calendar, navigate to <a href="www.certiport.com">www.certiport.com</a> and log in. Change your role at the top of the page to Organization Administrator or Member (see below for Proctor), hover over the **Exam Delivery** tab and click on the dropdown for **Compass Cloud: Create Sessions**, and then click the button to **Create and manage exam sessions**.

- ✓ Note: The methods for each role described on this page will take you to the same calendar dashboard. A new browser tab will open containing the calendar (you will not have to log in again).
- ✓ Tip: The calendar dashboard scheduling instructions are also available in a video.



For the Proctor role, change your role to **Proctor** and click on the section heading for **Compass Cloud – In classroom proctoring**. Next, click the button to **Create and manage exam sessions** and follow the on-screen prompts to create a session. A new browser tab will open containing the calendar dashboard.





Calendar Legend		
1: Help & Support	2: User Interface Language Selection	3: The Current User & Sign Out
<b>4:</b> Create New Session Button	5: Menu Collapse	<b>6:</b> The Session Creation Dashboard ( <i>currently selected</i> )
7: Session Page (see all upcoming & past sessions)	8: Next Session in queue for your CATC	<b>9:</b> Start Session Button (grayed out until 5 minutes before start time, starts next session in queue)
<b>10:</b> Edit Session Button (change name, time/date, exam group, Proctor, or # of Test Candidates of next session in queue)	<b>11:</b> View Details Button (view more info about the next session in queue)	<b>12:</b> All Upcoming Sessions
<b>13:</b> Options Buttons (confirm session, view details, edit, or resend emails of an existing session)		



#### **Session Creation Details:**

Review the information in this guide and carefully determine the details when creating your session event.

- ✓ **Important:** Payment per seat will be locked upon session submission, so we ask that you only create exam sessions for the number of Test Candidates that will actually attend. No-shows waste a valuable seat another Test Candidate could have used, but you can update the number of participating Test Candidates up to an hour prior to the session start time.
  - A single session can contain a mix and match of any <u>supported</u> program, suite, or version year (up to five different exam titles) and can accommodate up to 50 candidates.
  - CATCs can schedule at their convenience down to a minimum of 60 mins in advance of the session start time. You cannot schedule out past 30 days.
  - The person creating the session does not have to be the Exam Administrator (Proctor), but only the designated Exam Administrator (Proctor) can confirm the session. So, if you are creating a session for someone else, this ensures they are aware of it by only letting the person actually proctoring the exams to the Test Candidates confirm the session. See more about confirming a session on page 10.
  - If an Organization Administrator/Member creates a session on behalf of an Exam Administrator (Proctor), they will still receive a copy of all the emails that are sent to the Proctor (except the reminder emails to confirm the session, which can only be performed by the Proctor).
  - The person scheduling has to be associated to your Certiport Authorized Testing Center (CATC). Within the calendar dashboard tool, associated Certiport Organization Administrators can see all sessions scheduled for the center, associated Exam Administrators (Proctors) can only see the sessions that they created.
  - Once you create a session, you cannot edit the CATC, the payment method, the exam language, or the exam titles. If you need to change those details, you must delete the session and create a new one.
  - You can cancel your session up to one hour before it is scheduled to begin. After that, it becomes locked, and it cannot be cancelled, nor can any session information be edited during that final hour.
  - Vouchers that your CATC has purchased and are available for use can be used as a payment method when scheduling your exam session. However, vouchers that are assigned to Test Candidates, vouchers with retakes, and vouchers from our Store are not supported at this time. See the FAQ for detailed information.



#### A Note on Session Time (Live-in-the-Application exams only):

When using the Compass Cloud solution please note that there are two time limits you need to be aware of when delivering Live-in-the-Application (Adobe, Autodesk, or Microsoft Office Specialist) exams. Only Live-in-the-Application (LITA) exams employ the use of virtual machines on Compass Cloud, so **Session time** is only applicable to that type of exam delivery.

- **Session time:** the amount of time the virtual machine is active (approx 2 hours) or until the Test Candidate finishes the exam and disconnects from the session
- **Exam time:** the actual timed portion the Test Candidate has to complete the certification exam between 45-60 minutes for all standard exams

Session time is used by the Test Candidate to log in, review the tutorial, ask the Exam Administrator (Proctor) any questions, review their results, send feedback, or to complete other similar tasks. If the Test Candidate begins **later than 30 minutes** to their scheduled session, they will be locked out and need to **reschedule** their exam as there may not be enough overall time to complete all session time tasks as well as the exam itself.

✓ **Important:** It is imperative that Test Candidates with ADA accommodations that are taking Live-in-the-Application exams do not start their exam late or they may run out of session time.

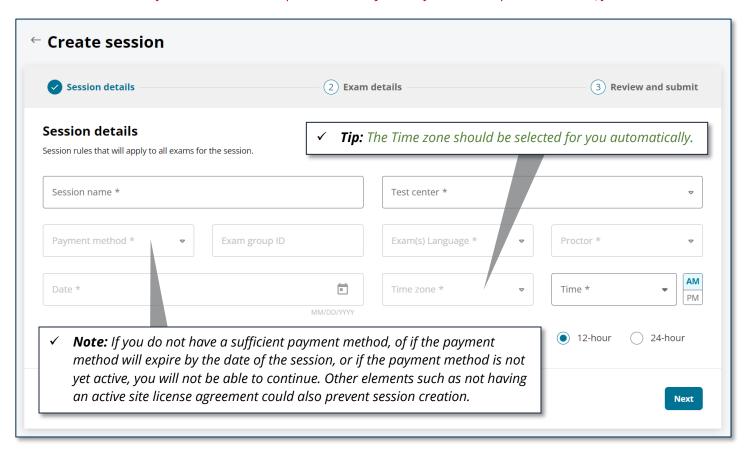


## **Creating a Session**

- 1. In the calendar dashboard tool, click the **Create session** button.
- 2. Enter a **Session name** and select your **CATC**.
- 3. When a valid CATC is selected, it will open the remaining fields. Select your **Payment method**, enter an **Exam group** number (optional), specify your **Exam language**, choose an **Exam Administrator (Proctor)**, and your desired **date/time**.



✓ Important: When a session is created, any corresponding licenses, inventory pieces, or vouchers matching the number of Test Candidates specified in a session will be debited from your CATC's account and put on hold. This ensures that when the session actually occurs, your CATC has enough pieces to cover it. Cancelling the session early will release the hold. Additionally, if a session starts with, for example, 10 Test Candidates scheduled and 2 are sick the day of the event, we would return the 2 unused payment methods back to the CATCs account after the session is completed. This may take a few hours to process. See FAQ for voucher use.

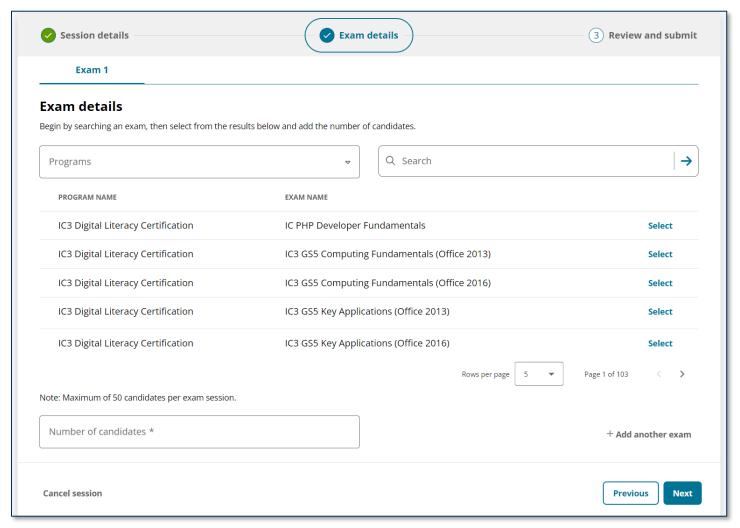


- 4. Click **Next**. The **Exam details** section will appear.
- ✓ Note: After a session has been created, an automatic email will be sent to the designated Exam Administrator (Proctor) specified in the session details, not the person who created the session, which could be an Organization Administrator from your CATC. See the Emails section on Page 10 of this guide for more info.



The Exam details screen is where you will select your exam titles and number of Test Candidates who will be taking each of the exam titles. You can administer up to 5 different exam titles and up to a total of 50 Test Candidates across those 5 titles within a single scheduled session. So, for example, if you started by entering 50 Test Candidates for an IC3 Digital Literacy exam, it would not let you enter any additional exam titles.

5. Begin by selecting your exam title for **Exam 1**. You can use the **Programs** dropdown or type a portion of the exam name in the **Search** box to narrow your selections.



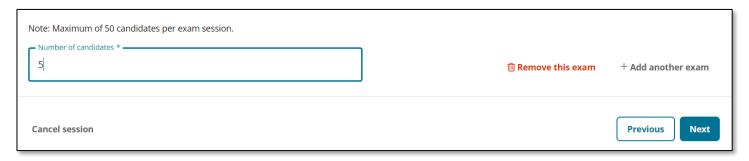
6. When you locate your desired exam, click the **Select** button and the entry will become highlighted.

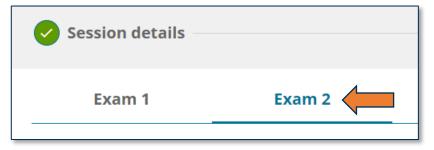




- 7. Enter the **number** of committed Test Candidates for **Exam 1**.
- 8. If you are done entering exam titles you can click **Next**.
- 9. If you wish to add another exam title, click + Add another exam and repeat Steps 5, 6, and 7.

If you wish to abandon this session and start over, click **Cancel session** or the back arrow. If you wish to return to the previous step, click the **Previous** button. If you wish to remove an exam title from the session, click **Remove this exam**.





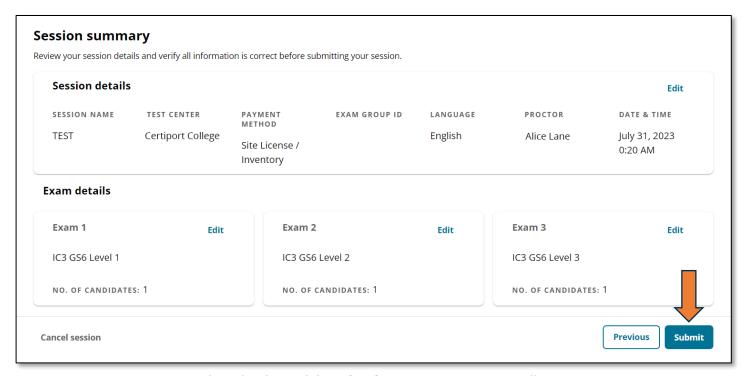
✓ Note: If you are entering multiple exam titles, use the headings at the top of the Exam details section to switch in between titles.



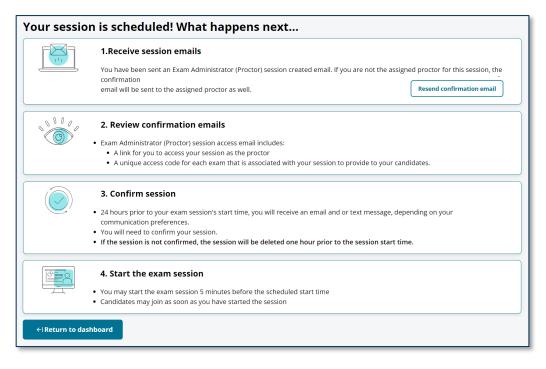
- ✓ **Important:** Remember that your payment method is debited at the time of session creation. If your CATC does not have the available payment method matching the exam title(s) or number of Test Candidates selected, you will be notified after clicking Next on the Exam details step.
- 10. After you have finished entering the exam titles, the number of committed Test Candidate participants, and have clicked **Next**, the **Review and submit** screen will appear.
- ✓ **Note:** Compass Cloud is always online, but there will be occasions of periodic maintenance. The system will not let you schedule during an outage, and a notice will appear at the top of the calendar if a blackout date is coming soon.



- 11. **Review** the Session summary screen to ensure all details are correct. Click the **Edit** button on any section to update the session or exam details before submitting the session.
- 12. If everything looks correct, click the **Submit** button.



- 13. Your session is now in the calendar and the What happens next screen will appear.
- 14. Review the steps and click the **Return to dashboard** button.



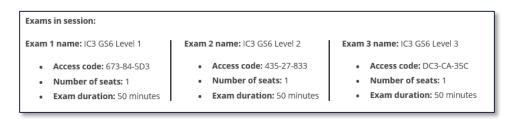
✓ Note: See the next section in this document for additional details on these four items.



## **Emails, Access Codes, and Session Confirmations**

After you have scheduled a session you will receive a success email with session details, instructions & support, along with access codes that you will distribute to your Test Candidates. The access codes will be unique for each exam title. For example, if 25 out of the maximum of 50 Test Candidates within a single scheduled session are taking the same IC3 Digital Literacy GS6 L1 exam, then all their access codes will be the same. The access code is also what ties the Compass Cloud desktop app to your specific CATC for the purposes of reporting.

A portion of the email you will receive is shown here. In this example it has details for 3 different exams within a single scheduled session and 1 participating Test Candidate for each (for a total of 3). However, it wouldn't matter if there



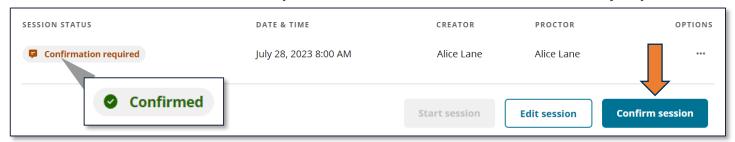
were 10 Test Candidates in each, they would all employ the same access code per exam title.

If you or the Test Candidate realizes that they were signed up to take the wrong exam, and the correct exam is not among the exam titles in your current session, this can only be changed by deleting and recreating the session or creating an additional session.

✓ **Tip:** If for any reason you did not receive your session email within 5 minutes of submitting it to the calendar, please check your spam folder. If you still cannot locate the email, you can log in to the calendar dashboard tool, locate your event in the **Session schedule** section, click on the three dots at the end of the row and click **Resend confirmation email**.

## **Confirming your Session:**

- 1. You will get two reminders to confirm your session. First at 24 hours prior to your session start time, then again at 2 hours prior. Sessions that are not confirmed will be automatically cancelled.
- 2. 24 hours prior to the session start time is the earliest you can confirm your session.
- 3. The success email sent to you after creating the session is not the same as confirming an exam. You must enter the calendar dashboard tool, view your upcoming session, and click the **Confirm session** button. After doing so, your exam session status will change from the orange "**Confirmation required**" to the green "**Confirmed**". *Note:* Sessions created fewer than 2 hours to the start time will be automatically confirmed.



4. The Creator cannot confirm the session, only the designated Exam Administrator (Proctor), (if different).

View details

Cancel session

Resend confirmation email

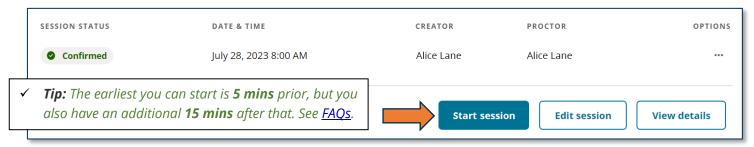
Edit



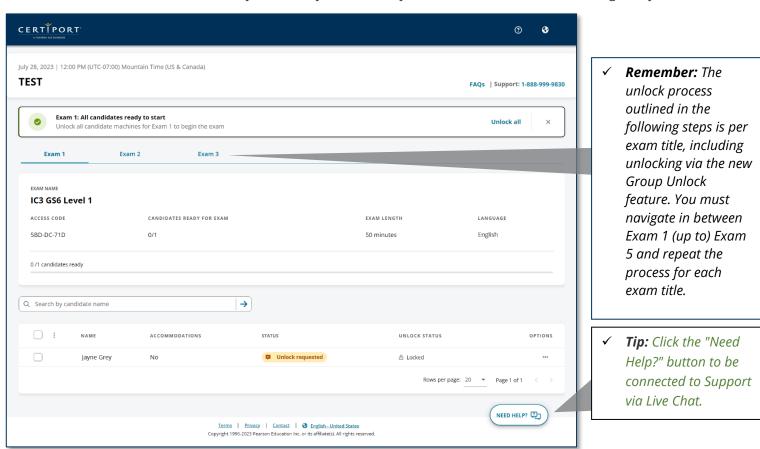
## **Administering an Exam**

As a best practice, please review the <u>Test Candidate guide</u> in addition to this guide to understand what the Test Candidate is seeing on their end during the exam session administration process.

- 1. Just prior to the scheduled session time, you will **log in** to <u>www.certiport.com</u> and access the calendar dashboard tool as described on <u>Page 3</u> of this document.
- 2. Locate your upcoming session and click the **Start session** button, which will open a new browser tab (separate from the calendar tab) showing you the administration dashboard. The **Start session** button will be grayed out until 5 minutes prior to the start time (reload/refresh the browser page if the button does not turn blue).



3. This dashboard will display each of the joined Test Candidates in a list (per exam title), along with their status, name and exam details, and allow you to verify & unlock any Test Candidates that are showing ready.



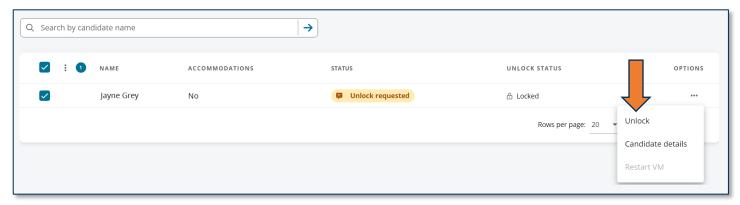


On the Test Candidate side, they will have launched the Compass Cloud desktop app, logged in using their Certiport username and password, entered their access code, verified that their name and exam information is correct, and then will be waiting in a virtual lobby for the Exam Administrator (Proctor) to unlock them.

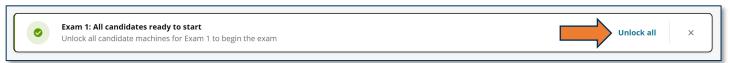
- ✓ **Note:** The Test Candidate will not be able to enter their access code until 5 minutes prior to the start of the scheduled session. They will receive a notice if they attempt to log in any earlier than that.
- ✓ Important: Immediately upon launching the desktop application, the Test Candidate's computer will go into lockdown, and they will not be able to alt-tab or access any other programs. They may exit the app by clicking "Close Window" at the bottom of the screen, but only until the actual exam launches, at which point they will need to complete the exam or run out of exam time to exit.
- ✓ **Remember:** The Exam Group (optional) and Payment Method are selected during session creation, so the Test Candidate will not be prompted to select or enter these details like they would in our other exam delivery models.

With the new Group Proctoring ability, you can now unlock a single candidate, a specific selected group, or all participating candidates as a batch from the administration dashboard (this also occurs per exam title).

4. Test Candidates that are ready and waiting in the lobby will have a status that says **Unlock requested**. Checkmark the individual, or a specific set of Test Candidates that have the same status, click the **three dots** at the end of the row, and then click **Unlock**.



5. If all Test Candidates under one exam title are ready, a message will appear at the top of the screen allowing you to unlock the entire group of Test Candidates by clicking **Unlock all**.

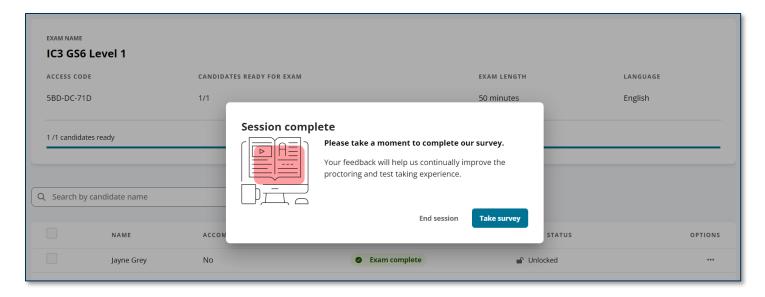


6. While the Test Candidates progress through the exam, their status will change accordingly.





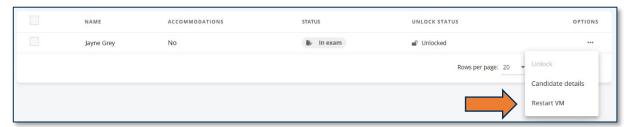
- 7. When a Test Candidate has finished, their status will change to **Exam complete**.
- Exam complete
- 8. Once **all** Test Candidates are finished across all exam titles, you will be prompted to end the entire session, or take a brief survey that will help us improve Compass Cloud.
- 9. After that you will be returned to the calendar dashboard. **Click** your name in the top right-hand corner of the screen and click **Log out** to close the browser tab.



## **Errors & Troubleshooting**

#### Restarting the virtual machine (VM) for Live-in-the-Application (LITA) exams only:

Exams administered with Compass Cloud from the Adobe, ACU, or MOS suites are delivered in a virtual environment. If you should encounter an issue within that environment that is preventing the Test Candidate from proceeding with their exam, it's possible to restart the VM on which the exam is taking place. During an active session on the administration dashboard, locate the Test Candidate experiencing issues in the list of session participants, click the three dots under the "options" column at the end of the row, then click "Restart VM".



Use the "Restart VM" button to try and resolve serious issues related to the software the Test Candidate is using on the VM, such as the LITA software has frozen or experienced an unrecoverable error. Using the Restart VM button will disconnect the Test Candidate, which typically takes just a couple minutes to restore the session and allow the Test Candidate to resume their exam (in times of high traffic this could take up to 10 minutes). The Test Candidate will see a loading icon during this time.



#### Q: I tried to restart the VM but the link is grayed out.

**A:** This would indicate you are not administering an exam that is taking place on a virtual machine.

# Q: What should I do if I accidentally close the Administration Dashboard at any point after the Test Candidates have joined?

**A:** The Test Candidates will not notice any interruption. Since it's a browser window, the best option is to press **Ctrl+Shift+T** (Windows) or **Command+Shift+T** (Mac) to quickly re-open the last browser tab closed and sign in with your Certiport credentials if prompted. If that doesn't work, follow the steps outlined in this guide to access the calendar dashboard, locate the session in progress, click the 3 dots at the end of the row and click **Resume session**.

#### Q: What should I do if I lose internet or experience an error?

**A:** After your connection is restored, you regain access to the administration dashboard. If you receive an unrecoverable error, restart the browser, and follow the steps outlined in this guide to access the calendar dashboard, locate the session in progress, click the 3 dots at the end of the row and click **Resume session**.

#### Q: What should I do in the event of a freeze or crash?

**A:** If the Test Candidate's local machine freezes, they should reboot their workstation, launch the Compass Cloud desktop application again, log in, enter the same access code at which point they will be prompted that they have an exam in progress and can click the **Enter exam** button. Prolonged disconnects may result in an unrecoverable loss of exam time.

## **Frequently Asked Questions**

#### Q: Can we use vouchers in Compass Cloud?

**A:** Yes, vouchers that your CATC has purchased and are available for use can be used as a payment method when scheduling your exam session. However, vouchers that are assigned to Test Candidates, vouchers with retakes, and vouchers from our <u>Store</u> are not supported at this time.

#### Q: How can we check if we have available vouchers or if they have been assigned to a Test Candidate?

**A:** Log in to www.certiport.com as an Organization Administrator. Hover over the "My Certiport" tab and click on the dropdown for **Vouchers**. The "Product" column will indicate if the order is for a "voucher" or "voucher + retake". The "Available" column will indicate how many unredeemed and unassigned vouchers are remaining in that order. You can click the orange **Detail** link to see if any of the vouchers in the order are assigned to any Test Candidates along with additional info. Assigned vouchers do not count as "Available" and vouchers from our Store won't show in an order at all. If present, the orange "Reassign" link is not for changing the Test Candidate assignee, but rather transferring an order of vouchers to another CATC if you have a multisite account. Only a Test Candidate can unassign a voucher by logging in to www.certiport.com, locating the voucher under "My Exams" and clicking the green **Remove/Unassign** button.

voucher	Orders					
Show voucher	orders associated wit	h the selected	Testing Center.			
VOUCHER OR	DERS					
Order #	Order Date	Quantity	Product	Expiration	Available	
Order #	Order Date Oct 04, 2022	<b>Quantity</b> 50	Product Intuit Certifications Voucher	Expiration Oct 04, 2023	Available 7	Detail Reassign
Order #				•	Available 7 0	Detail Reassign Detail Reassign



#### Q: What if I have not received my confirmation email by the time our scheduled session has begun?

**A:** After creating an event in the calendar, the confirmation email will be sent almost immediately. If you have not received it within 5 minutes, check your email spam filters and if you still cannot locate them, return to the calendar, locate your session event in the dashboard, click the three dot icon under "options" at the end of the row and then choose **Resend confirmation email** to generate the email again. If you continue to experience issues receiving your confirmation, please delete the session and create a new event.

#### Q: I received the session creation email, but my session status still shows "Confirmation required".

**A:** The first email you receive contains your Test Candidate access codes and additional information about administering exams with Compass Cloud, it does not confirm your session in the calendar. After you are certain that all your session details are correct, log in to the calendar dashboard tool, view your session, and click the "Confirm session" button, at which point another email will be sent to you. Sessions created fewer than 2 hours before the scheduled start time specified in the session will be automatically confirmed.

#### Q: I went to confirm the session and the "Confirm session" button is grayed out.

**A:** Only the designated Exam Administrator (Proctor) can confirm a session. If someone created a session but assigned an Exam Administrator (Proctor) other than themselves, they cannot confirm a session, even if they are a Certiport Organization Administrator.

# Q: It's fewer than 24 hours to the start of my session, I have not received my email reminder to confirm, and my status is stuck on "Scheduled", what could be wrong?

**A:** It's possible the system did not refresh your status and trigger the next status condition of "Confirmation required". Go to your session, click "Edit", and then without making any changes, click "Save" again which should refresh the status and trigger the email which will allow you to confirm.

#### Q: Do we really only have a 5-minute window to begin our session?

**A:** No. The button to "Start session" will be grayed out until 5 minutes prior to your scheduled start time, but then you have an additional 15 minutes after the start time to initiate the session (for a total of 20 minutes). If you go longer than the 20 minutes the session will drop off the "Next session" list and you will be unable to start it or cancel it. You will not receive a notice or email if this occurs.

#### Q: I scheduled a session but had some no-shows, what happens to those unused payment methods?

**A:** If, for example, a session begins for 10 Test Candidates and 2 are sick the day of the event, we would return the 2 unused payment methods back to the CATCs account after the session is completed. This may take a few hours to process.

#### Q: Can we change session details even after we have confirmed the session?

**A:** Yes. As long as the session status is not showing as "Cancelled" or "Completed", you can edit some of the session details. However, once a session is created, you cannot edit the CATC, the payment method, the exam language, or the exam titles. If you need to change those details, you must delete the session and create a new one. The session cannot be cancelled, and no session information whatsoever can be edited in the last 60 mins before the actual event.

#### Q: I started my session but a new browser tab with the proctoring dashboard did not open.

**A:** Return to the calendar dashboard, locate your session, click on the 3 dots at the end of the row and click **Resume exam** to try again. If this does not work, ensure you are using one of our supported browsers and then contact Support if you cannot get the individual tab containing the administration dashboard to open.



#### Q: I have an Adobe, ACU, or MOS exam that is frozen, how can I fix it?

**A:** If a Test Candidate is unable to proceed with testing due to an error or freeze on the virtual machine, you can try to restart the VM by locating the Test Candidate in the proctoring dashboard, clicking the 3 dots at the end of the row under options, then clicking **Restart VM**. See the Errors & Troubleshooting section on Page 13 for detailed info on restarting VMs.

#### Q: The Test Candidate requires an ADA accommodation; can I still apply for one with Compass Cloud?

**A:** Yes. ADA accommodations are supported in the Compass Cloud solution in the form of extended testing time for preapproved candidates. However, accessibility tools such as JAWS and other screen readers are not supported. Certiport's Compass for Windows and Compass for Mac locally installed solutions still support all forms of accommodations detailed on our <u>ADA page</u>.

✓ **Note:** With Compass Cloud, there is nothing additional that needs to be performed for ADA that must be selected when scheduling an exam session for a Test Candidate with an accommodation. Simply schedule a Test Candidate that is already approved for an accommodation, and they will have extended time when they launch their exam. If a Test Candidate does not have extended time but has been approved, please contact Customer Service (it can take up to 10 days after submitting an ADA request and all supporting documentation to be approved).

## Q: Can we schedule a mix of ADA-approved Test Candidates along with regular-time Test Candidates in one scheduled exam session event?

**A:** Yes. Since the accommodation approval "flag" comes from the Test Candidate's user account profile, Compass Cloud will adapt to the different types of exam lengths and stay active as long as required (or until the exam time runs out). It is imperative that ADA Test Candidates that are taking Live-in-the-Application exams do not start their exam late or they may run out of session time.

## **Contact Support**

- You can connect to a Live Chat with Support by clicking the **Need Help?** button in the administration dashboard.
- You can also visit our Compass Cloud <u>Updates & Support page</u> for information about the delivery solution and additional ways to contact us.

