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V2.1 Reporting

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Introduction

- Your Presenter:
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    - Project Manager

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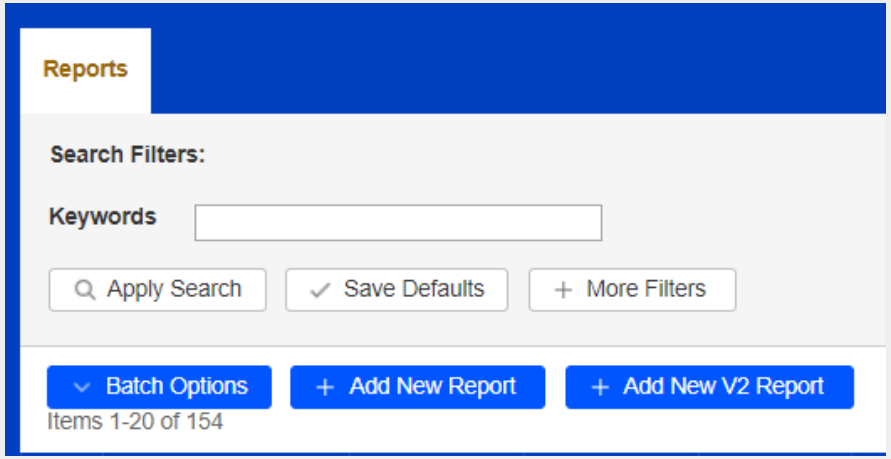
Resources

- <u>Additional Modes of Support</u>
  - Support Line: **(703) 373-7035**

    (9 am to 8 pm EST)
  - Support Email: **[your school]-advocate-support@symplicity.com**
  - Neighborhood: **https://neighborhood-community.symplicity.com**
  - Your Client Manager or Account Executive

Overview

- ✓ V1 and V2 Reporting
  - a. Choosing the Base Class for your Reports
  - b. Differences between V1 and V2 Reports
- ✓ V2.1 Reporting
  - a. Features
  - b. Demonstrations
- ✓ Top Utilized Reports
- ✓ V2.5 Update



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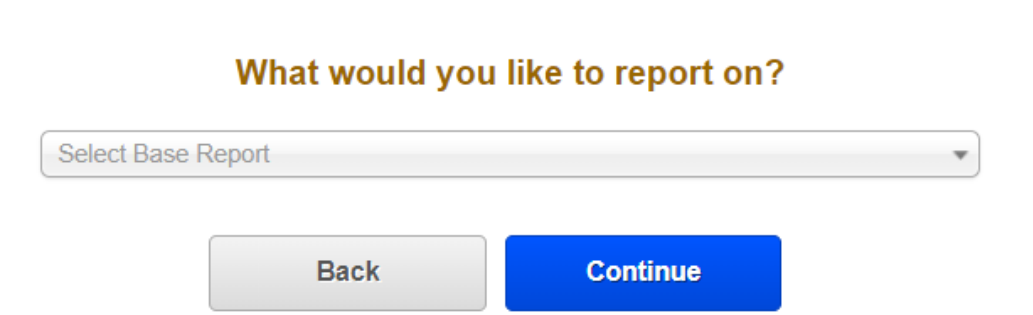
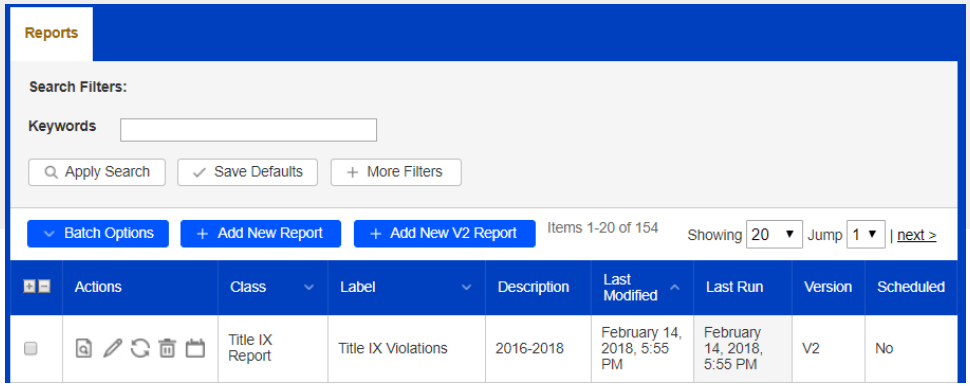
Getting Started

1. Question – On what data are you trying to report?
   a. Helps you clarify and use Reporting more effectively
   b. Helps you determine which “Base Class” to use
2. Base Class
   a. Where is most of the data coming from?
   b. Most common base classes are: Administrative Action, Incident, Student, CARE Report, and Title IX
   c. Determining the base class will also help you determine what related data can be added to the report



Reporting Tips

1. When you first create the report, try not to filter too much data.
2. Make sure you are adding the correct columns (fields) to the report.
3. Know that you can save reports, edit them, and regenerate them as often as you like. Once you have created the report, you won't necessarily have to start a new each time.
4. You can schedule up to 5 reports to run at a time!



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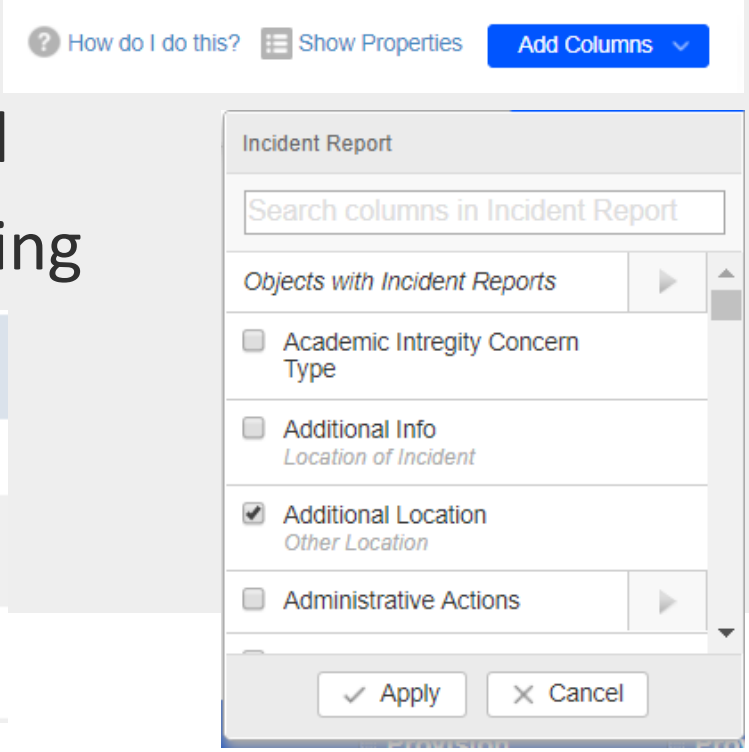
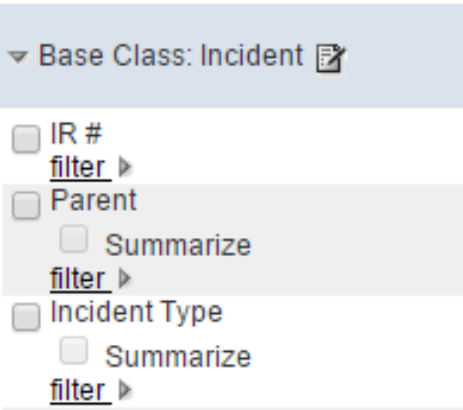
V1 Reporting VS V2 Reporting

1. The look is different but the data is the same!
2. Sometimes helpful to find the data you're looking for in V1 first if you don't know where the columns are located.



3. In V2 Reporting, preview and organize data before generating the report.



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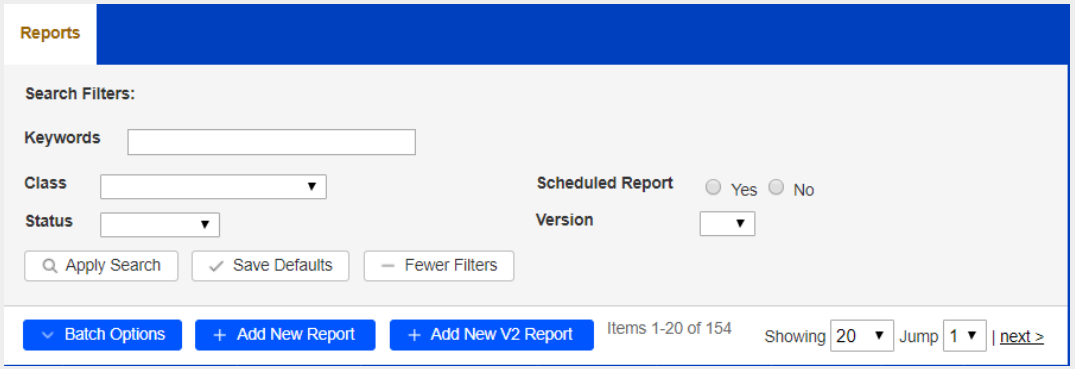
V2.1 Reporting

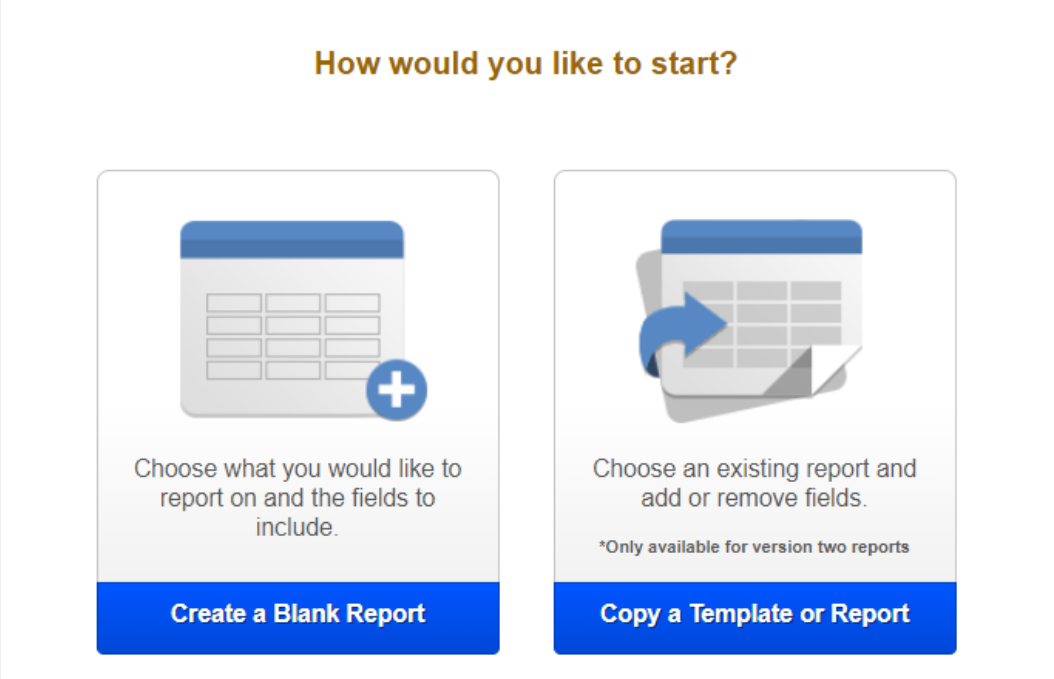
- When you first go to view the Reporting tool, it will look something like this:



- Note the various search/filter options: the Keywords box, the More Filters button (for filtering the list), and the "Showing" dropdown.
- To begin creating a new report, click the "Add New V2 Report" button.

Creating Reports

After clicking the “Add New Report V2 Report button, you are taken to a screen that will give you two options:

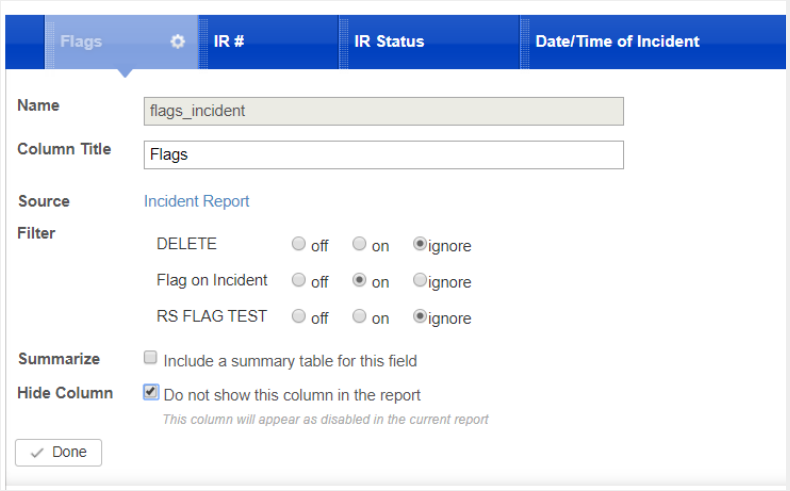


V2.1 New Features

- Archived Items – pull archived data into reports.

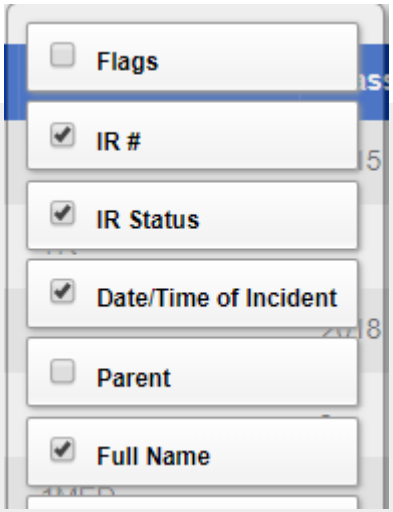
Archived	Archived On
Yes	January 26, 2018, 10:53 AM

- Flags – report and filter on object flags.
- Ghost Filters – filter by the column, but exclude the column from the final report.



V2.1 New Features

- Hide Columns in Final Results - hide/show report columns on the review page

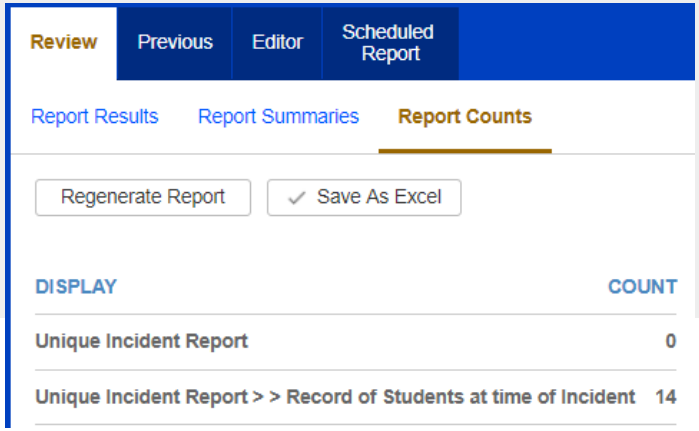


- Snapshot – on the Editor tab, click on the “Show Properties” to see a high level overview of report filters and settings displayed in one place.

Columns	Sort	Filters	Summarize
Flags	None	Flag on Incident : On	No
IR #	None		No

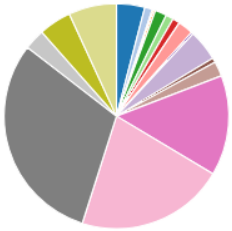
V2.1 New Features

- The Report Review tab – the review page has been broken into Report Results, Report Summaries, and Report Count subtabs for clarity.
- Object Counts – “Report Counts” will display a count of unique objects within the report.



V2.1 New Features

- Filter Empty Summaries - allow showing/hiding of empty summary data (where values are zero)
- Sort Summary Results - ability to sort summary options in ascending or descending order.



Summary for IR Status
+ Show Empty Results

Legend	Label	Count
	Processing	443
	Pending Action	310
	Pending	209
	Responsible	100
	Reopened	68
	Completed	65
	Accused	59
	Public	43
	Closed/Responsible	32
	Not Responsible	31
	Appealed	24
	Appeal: Decision Modified	16
	Closed/Informal Resolution	16
	Closed/No Violation	15
	Draft	9
	Appeal: Decision Sustained	4
	Closed/Suspended	4
	Appeal: Decision Overturned	3

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V2.1 Reporting

- Student Involved in Incident Fall 2018

IR #	IR Status	Date/Time of Incident	Incident Type	Record of Students / Organizations at time of Incident	Gender
00018-2018	Pending	February 13, 2018 1:18 pm	University Conduct	Brent Detar (-) (1002456)	Male

- Student Involved in CARE Report

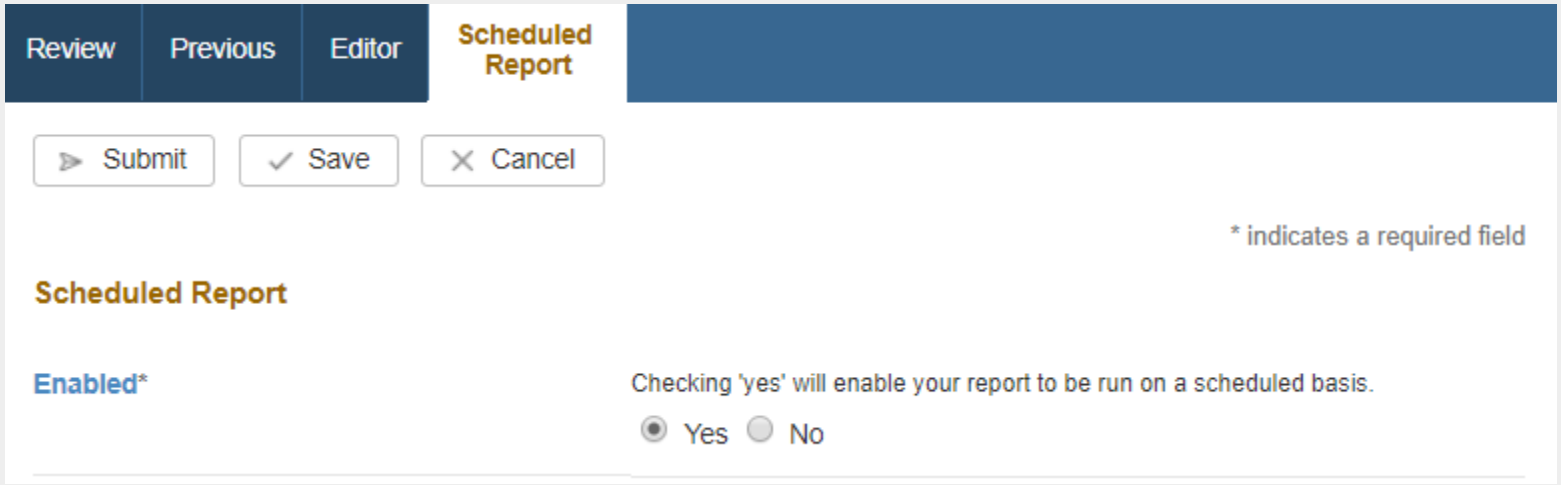
Case #	Created	Student ID	Email
C00009-2017	December 12, 2017, 2:01 PM	1010308	Su.Andrew@demo.edu

- Student Involved in Title IX

Report #	Created	Record of complainants at time of Report	Record of respondents at time of Report	Resolution
T00004-001-2015	December 04, 2015, 10:20 AM	Maria Abrams (-) (1000013)	Brent Detar (Dean of Students Office - 614) (1002456)	Removal from residence hall

Scheduling Reports

- Staff can schedule reports to be regenerated automatically by enabling the report to be run on a scheduled basis.



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Live Demonstration

- Incident Report- Students with Open Sanctions
- Incident Report- Academic Integrity and Violations
- CARE Reports- By Assigned To
- Title IX Reports- Phase Dates

- https://demo-advocate.symplicity.com

Common Issues

- Nothing in report? Or too much information provided?
  - Too many filters or not enough filters in your report.
  - Try different fields in your report.
    - Class is a different field than Class Year
    - Change your base class to see if it is what you should be using.

- If you can't find the field you're looking for in V2, try looking in a V1 report. Use "Ctrl F" to look for field name.

Tips and Tricks

There are many tips and tricks that we want to remind you of as you are creating reports:

- Use your filters.
- Choose the right base class.
- Okay to use V1 and V2 Reports
- Some List Views have filters that you can use instead of making a report.
- You can make up to 5 scheduled reports. You can set up email notifications for when they are processed.
- Don’t forget that it is okay to call Support or reach out to your CM for additional help.

V2.5 Update

- Modernized design
- Create ad-hoc reports with ease
- Visualization

V2.5 Update

Reporting

Search | Return To Previous Screen

2017-2018 Cases (Created 2018-02-19 21:55:51)

Search | Return To Previous Screen | Return To List (Reporting)

Review | Previous | Editor | Scheduled Report

Results | Summaries | Counts

Download Excel | Duplicate | Show Properties

GENERATED ON: Feb 19, 2018 9:55:51 PM | RUN TIME: 00:01 | UNIQUE RECORDS: 932 | 2 Summaries | 2 Counts

Showing 20 per page

First | Previous | 1 | 2 | 3 | 4 | 5 | ... | 47 | Next | Last | Show/Hide Columns

Employee Victims/Complainants	IR #	IR Status	Clery Charges	Date/Time of Incident
	DRAFT	Draft		November 1, 2011 8:30 pm
	00125-2011	Pending		July 6, 2011 8:00 am
	00144-002-2011	Appeal: Decision Modified		November 1, 2011 1:05 am
	00026-006-2017	Pending Action	No	May 15, 2017 1:00 pm
	00044-002-2012	Pending Action		October 28, 2012 1:00 am
	00029-2015	Pending	Yes	November 5, 2015 11:16 am

QUESTIONS?

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