symplicity™

Maximizing Your Advocate Tools

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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

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Overview

A. Digests

B. Hearing Packets

C. Notes

- ✓Note Notifications
- ✓3rd Party Responses

D. Other

E. Rules

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Overview

What do you want to learn more about today?

When poll is active, respond at **PollEv.com/dotinglagoon195**

Text **DOTINGLAGOON195** to **22333** once to join

A. Digests

B. Hearing Packets

C. Notes

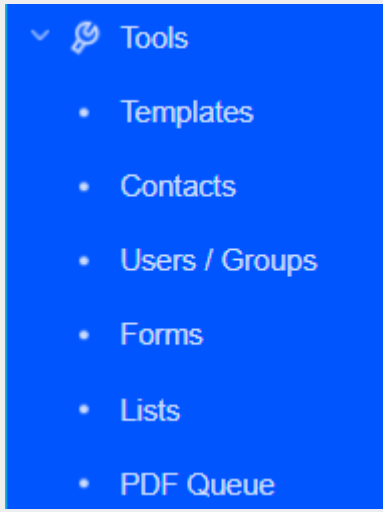
- ✓ Note Notifications
- ✓ 3rd Party Responses

D. Other

E. Rules

PDF Queue/Digests

- You can run digests throughout the system to get student or case history:
  - Student Digests for an individual student
  - Batch Case History for multiple students
  - Case Share Digests
  - Security Report Digests
- These options are created and edited in the Digest Template



PDF Queue/Digests

- Once submitted, the PDF Queue processes every 15 minutes.
- The PDF icon shows in the Case History Queue "Generated PDF" column when completed.
- Files and PDFs will be automatically deleted 21 days after their creation.

Case History Queue | **Letters Queue** | Case Share Queue | Security Reports Queue | Hearing Packet Queue

Items 1-2 of 2 Showing 20

Title	Process Type	Uploaded File	Status	Expiration Date	Created by Staff	Created By	Generated Pdf
Batch Letter Request 20180212	Batch Action Request		Completed	March 5, 2018 12:00 am			

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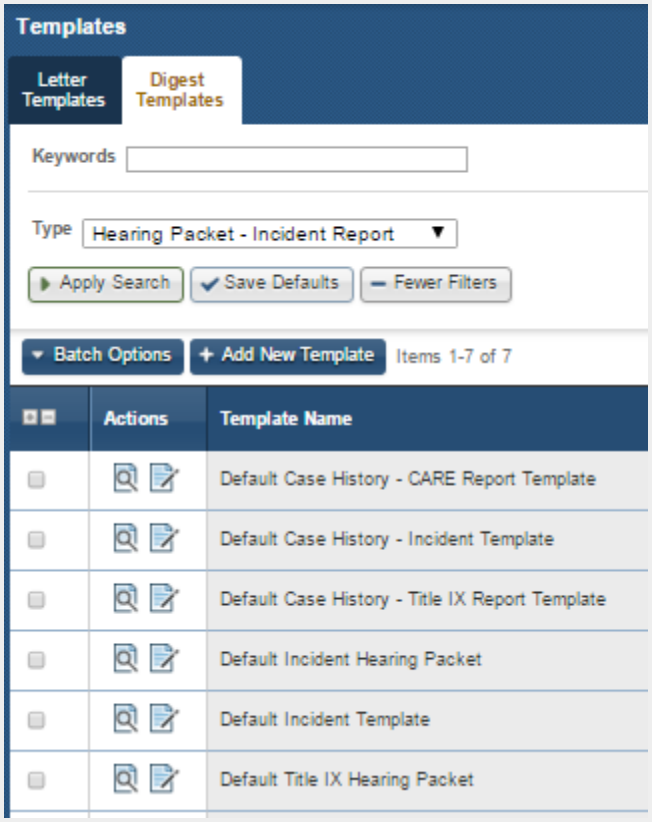
Live Demonstration

- Student Digest
- Case History
- How to Edit Digests and Case History templates
- PDF Queue

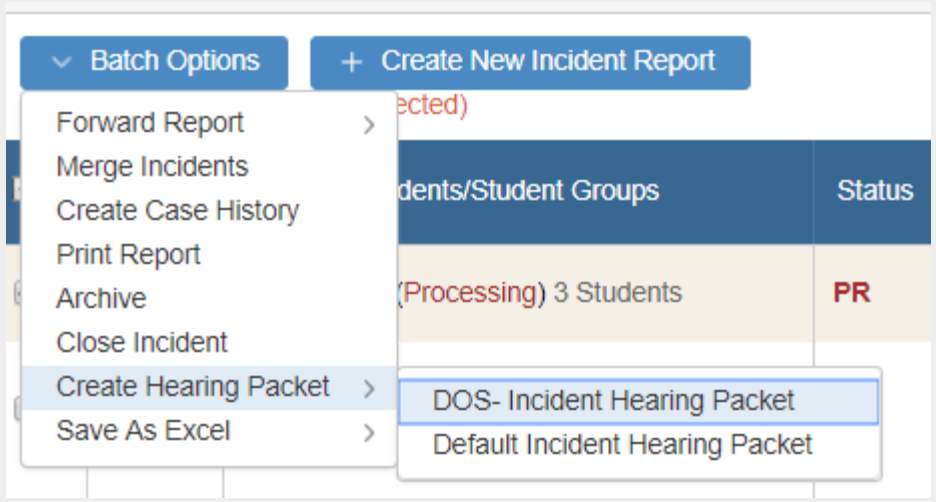
Hearing Packets

- The use of batch Hearing Packets will allow you to generate a hearing packet for multiple child cases at one time.
- The templates are used to organize and display the data in the digests you run.



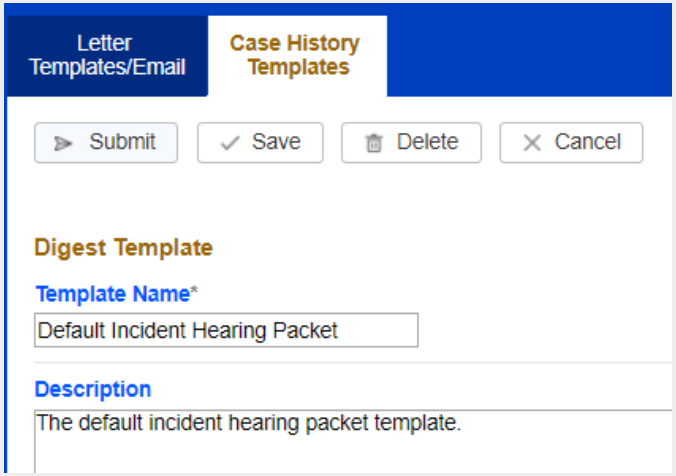
Incident Hearing Packets

- Incident Hearing Packets may only be created with PROCESSING cases. So they cannot be created with cases that are ‘Pending’ or ‘Public.’



Hearing Packets- Digest Templates

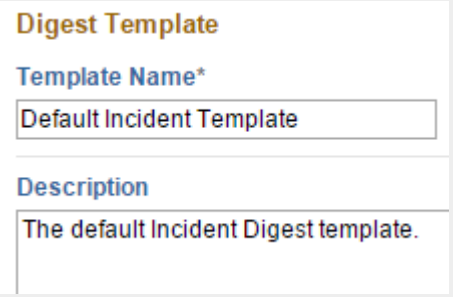
- The Case History Template allows you to customize the data elements and layout of the Digest you generate for the hearing packet. It is used to generate individual and batch digests.
- You can have an unlimited number of templates.

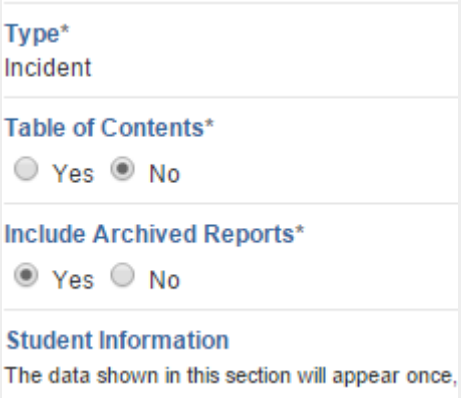


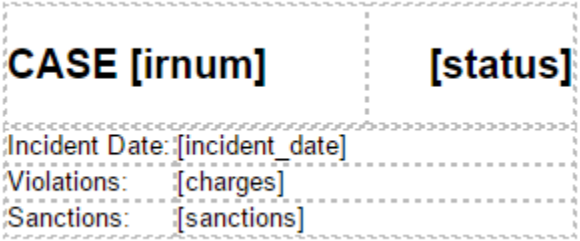
Creating Hearing Packets Templates

- Create a New Hearing Packet Name
- Choose “Hearing Packet.”
- Select Yes or No for “Table of Contents”
- Edit each section listed with the corresponding merge codes

- If there is no data present in a particular field or section, it will display as blank when the digest is generated.

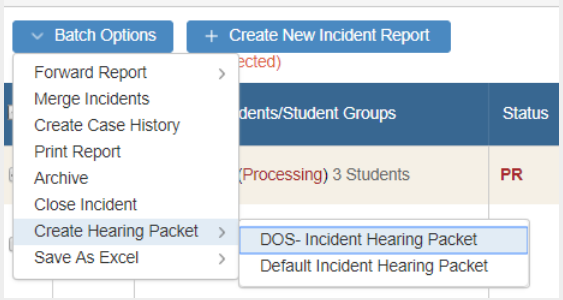






Creating a Hearing Packet

- Select the Incident Report, CARE Report, or Title IX Report
- Select Batch Options
  - Create Hearing Packet
  - Select the Hearing Packet Template you want to use, then click OK



- You will then be redirected to the Hearing Packet Queue page where you will see the PDF when it becomes available.

Utilizing the Hearing Packet Queue

- Multiple packets created from the one request can be used
- Batch generated hearing packets are generated every 15 minutes of the hour

Live Demonstration

- Multiple cases pulled into a Hearing Packet
- Individual Incident Report Hearing Packet

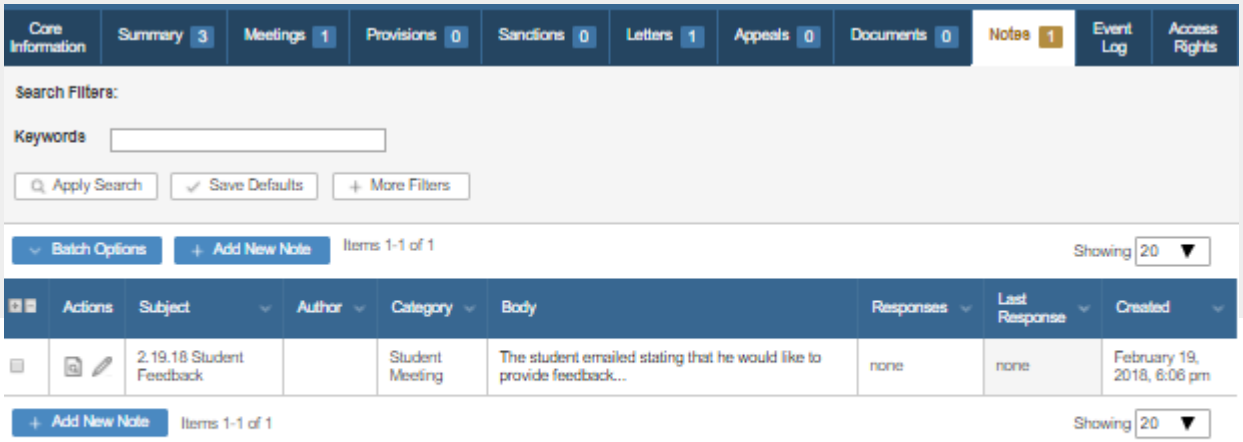
Notes

- Notes provide a way for users to add additional information to Incident, Care, Security and Title IX cases after the original report is submitted.
- Notes can be added to a case as a single note, as a discussion thread, or from a “3rd party” who does not have access to the system.

Actions	Subject	Author	Category	Body	Responses	Last Response	Created
	2.19.18 Student Feedback		Student Meeting	The student emailed stating that he would like to provide feedback...	none	none	February 19, 2018, 6:06 pm

Adding Notes

- Notes can be added in conjunction with a number of different Record types throughout the system.
  - A note tab will display within the object you are in. To add a note from within a record/report, select the "Notes" tab. Click "Add New Note."

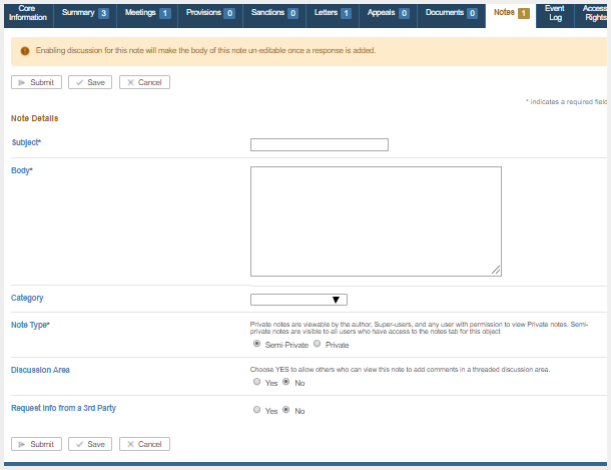


Adding Notes

Fill out the fields in the Note form.

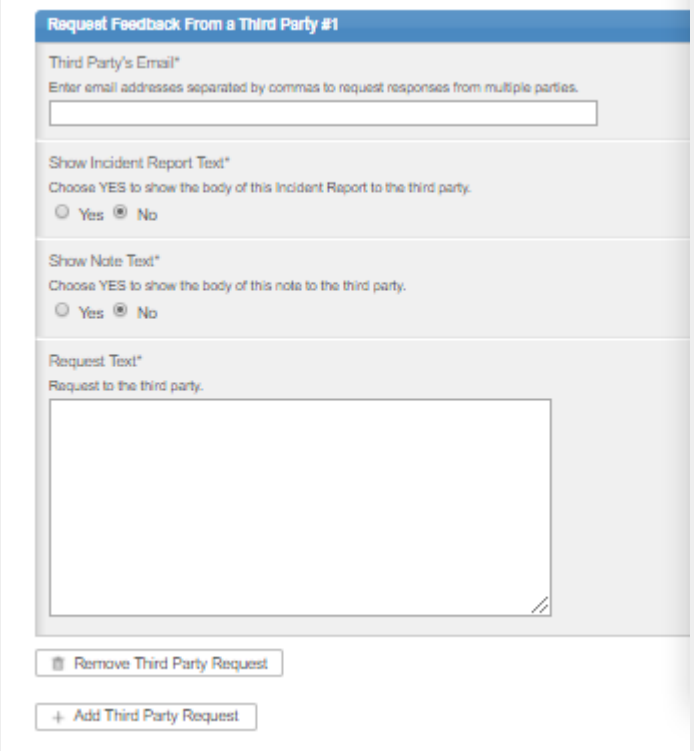
Most importantly:

- Subject
- Body
- Note Type
- Discussion Area
- Request Information from a 3rd Party



Request Note Feedback from a Third Party

- Advocate has the ability to allow users to request information from a person who does not have access to the system.
- When the request is made, the email address entered is sent a system message.
- When the response is entered, it is attached to the same note from which the request is sent.

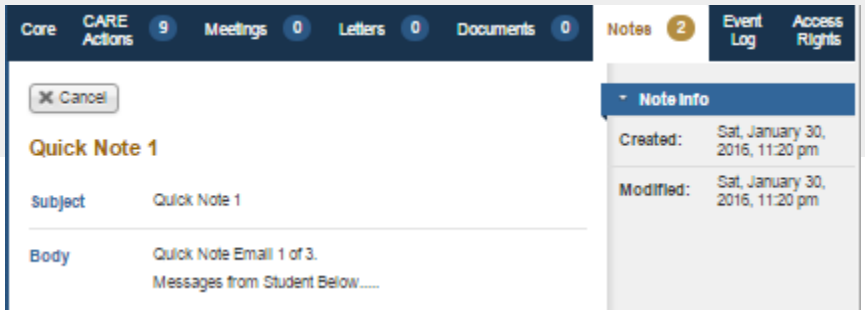


Quick Note Update to Reports

- To use quick note you may either include the quick note email on a response to an email or send an email directly (in the “To” or “cc” email address fields) to the quick note email address.
- Forward the email to

<case number>.<schoolname-advocate>@advocate.symplicity.com

- Once the email is sent, the email contents will generate a new note for the associated case.



Live Demonstration

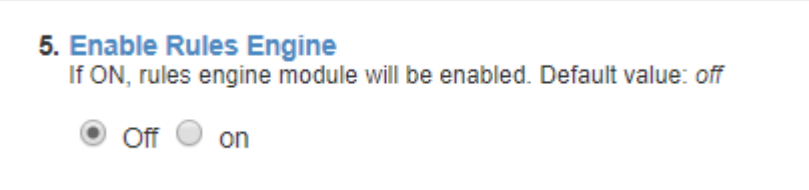
- Add a Note
- Request info from a 3rd Party
- Quick Notes

Rules Engine

- Rules Engine is a tool that will allow you to set up default case routing and notifications for the creation of both Incident, CARE Reports, and Title IX Reports. Additionally you can set up rules regarding modifications to CARE Reports and Title IX Reports.

Rules Engine

- In order to use the Rules Engine, it must first be enabled. To do so, navigate to System Settings > Core Settings > General and turn on #8 Enable Rules Engine.



Rules Engine

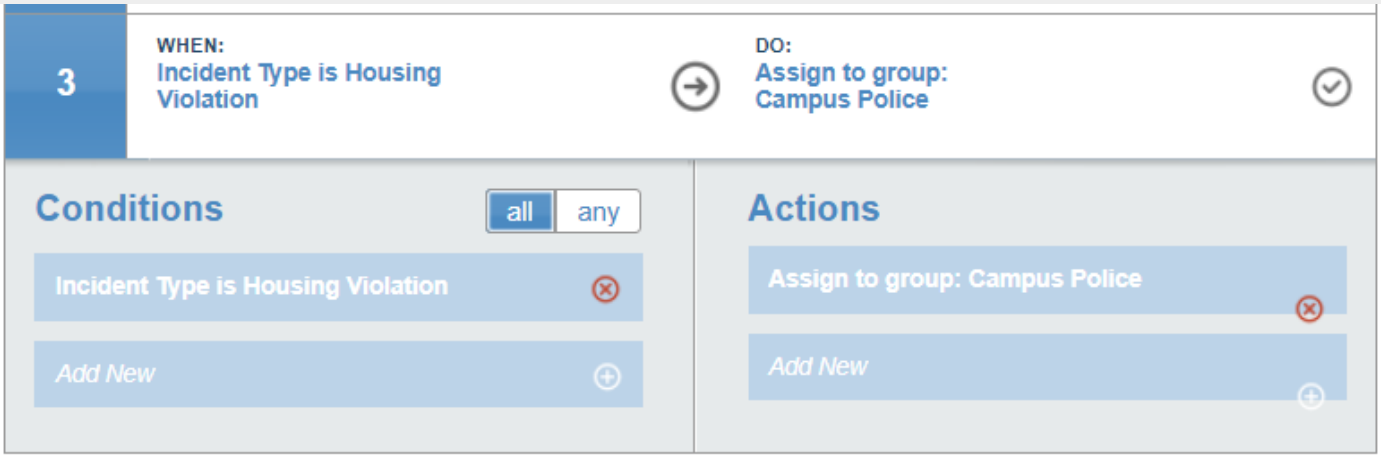
- When you are ready to create a rule, go to the left navigation menu, then Tools > Rules. Click on the icon in the View Rule column next to the type of rule you want to create or modify.
  - Note that use of the “New Incident Report Submitted” or “New CARE Report Submitted” relates only to the initial creation of those reports, while “CARE Report Modified” relates to a change in an existing CARE Report.

New Incident Report Submitted

1	WHEN: Location of Incident is Stillwater Campus	DO: Assign to group:
2	WHEN: Location of Incident is Danville Campus	DO: Assign to group: Facilities Services
3	WHEN: Incident Type is Housing Violation	DO: Assign to group: Campus Police

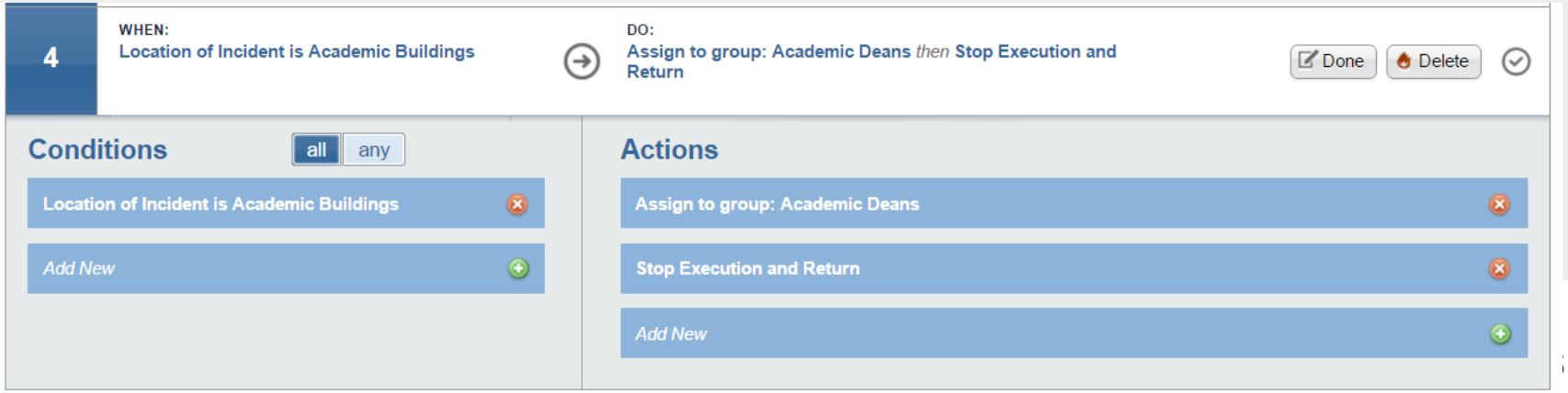
Rules Engine

- After viewing the Rules, under the Context Tab, when under the Rules Tab, click the "Add Rule" button to create a new Rule.
  - On the Contexts tab.
  - View Rule.
  - Click the "+ Add Rule" button.
  - Click Save.



Rules Engine

- You may select more than one condition for a Rule making sure to save the first selection before adding a new one.
- The conditions are used to determine whether or not the rule is run. The conditions can be set so that if ANY of the conditions apply, the rule is activated, or it can be set to activate only if ALL conditions are met. This can be toggled by clicking either “Any” or “All” at the top of the conditions section. For example
  - If the rule is set to ALL, then the Incident Type- Residence Hall Violation and Location- Alumni Hall will be assigned to Jack Sparrow. (ALL applies only when all conditions are met.)
  - But if the rule is set to ANY, then the Incident Reports with Incident Type- Residence Hall Violation OR Location- Alumni Hall will be assigned to Jack Sparrow. (ANY applies only when any of the conditions are met).



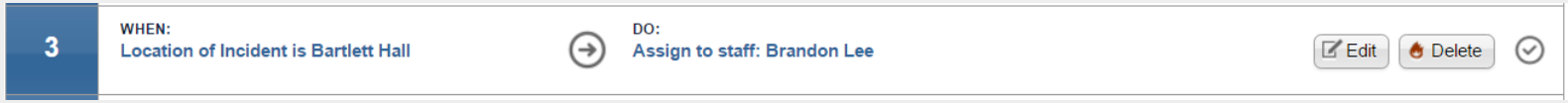
Rules Engine

- When the Rules are set, they will apply going forward.
- In creating or modifying rules, know that they will be applied by the order of rule until it is given a “Stop Execute and Return” action.
- Use of the “Stop Execute and Return” action will follow the rule and then perform no further actions for those conditions.

1	WHEN: All Incidents *and* Incident Type is Campus Security	→	DO: Assign to staff: Adam Braverman	✓
2	WHEN: Incident Type is Housing Facility Issue	→	DO: Assign to staff: Alicia C Dimond *then* Stop Execution and Return	✓

Rules Engine

- To edit a rule, view the Context where the rule should be edited, click on the Edit box for the specific rule.

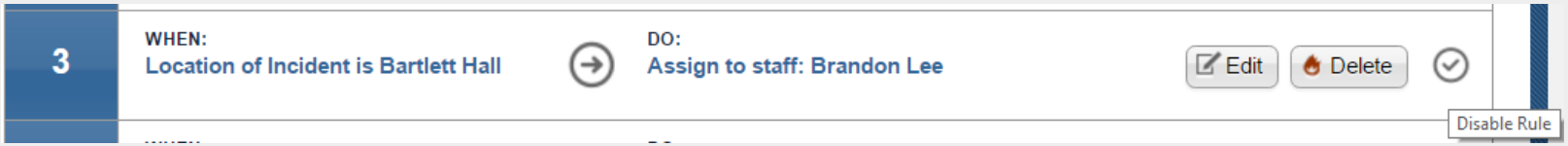


- Choose the specific Condition or Action that you would like to add, change, or remove. Click on Done.

- Once you are done editing the Rules, Click on Save.

Rules Engine

- When Rules are Deleted, they cannot be magically placed back in your system. The Rule would need to be recreated.
- To Disable a Rule, click on the . Once clicked, the rule cannot be edited, but it can still be deleted.



- When the rule should be enabled again, click on where the checkmark used to be.

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Live Demonstration

- Add a Rule
- Test the Rule

What's in your Tool Box?

-Any other additional tools you would like to go over?

-Any other tips and tricks you would like to share?

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Tips and Tricks

- Quick Notes can only be created from staff emails in your system.
- Incident Hearing Packets can only be from Processing cases.
- User rights are always important.
- Be patient waiting on your PDF Queue.
- Verify Rules are ON if you want them ON.

Questions?

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