symplicity™

ADVOCATE

Implementation Guide

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Advocate: Implementation Steps to Go Live

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Step 1: Identify Campus Contact

Prior to Kickoff Call

Before any access is given to your Advocate system, we will identify the appropriate contact(s) at your university to handle specific aspects of the system. The primary contact will be the system administrator to relay problems between the staff and Symplicity as well as manage system settings and general maintenance. An IT contact will be necessary to coordinate sending student data from the registrar system to Advocate in order to maintain accurate information.

Step 2: Provide Import Data to Symplicity

Prior to Kickoff Call

If your school is intending to import data (students, pictures, schedule, buildings, rooms, staff), please provide us with that information as early in the implementation process as possible. You may refer to the Symplicity Advocate import templates for examples of properly prepared import spreadsheets. Please note that the deadline for this information is prior to Training 2.

Tips for preparing import files are included at the end of this document as Addendum #1.

Step 3: "White List" Symplicity Network Addresses

Prior to Kickoff Call

Please ask your IT department to "white list" Symplicity's network addresses in order to ensure smooth delivery of email from your Advocate system to your user community, especially your students. Symplicity's network range is 66.151.109.0/24, or 66.151.109.1 - 66.151.109.254.

Due to the significant amount of email processed by Symplicity, the number of mail servers is constantly growing. White listing a single set of IPs will not remove the problem. We control the entire class C subnet of 66.151.109.0/24.

Step 4: Identify Core Training Group

Prior to Kickoff Call

We will utilize a "**Train the Trainer**" model via four separate training calls (described below) to assist you in preparing to launch your system. This core group should consist of members of the various departments and campus constituents which will be utilizing Advocate. These group members will be trained in the use and maintenance of the system in order to allow continued internal administration as well as training for additional staff members throughout your campus, such as student staff or clerical personnel.

Step 5: Kickoff Call

Questionnaire

A questionnaire will be provided to the primary contact to document the expectations and requirements of Advocate. The questionnaire will primarily cover which departments will use Advocate, expected launch date, and current workflow. It will prove helpful for all Advocate administrators fill out the questionnaire so that all needs are addressed up front.

The Kickoff Call

During the initial kickoff call, we will discuss a number of items, as listed below. This call typically takes about an hour.

Items to be discussed:

- Questionnaire Responses
- Expectations of Advocate
- Future Training Call Schedules
- Discuss information to gather

Step 6: Training 1

Incident Report Form and Form Builder

Discussed in Training 1

The backbone of Advocate is the incident report form, which is the launching point for each new incident to be reported. This form will be customized using the Form Builder tool to accept the necessary fields and use the appropriate language to reflect your current process. We will go over commonly used fields and how to make modifications to existing ones in the Form Builder tool.

Staff Account

Discussed in Training 1

After a demonstration on creating staff and supervisor objects you will be able to create all accounts for your office. Separate from the authentication method your institution will be utilizing, each staff member (non-student users) who requires access to Advocate will need an account created for them. The user's email address will serve as the login name and will be used to indicate the level of functionality in the system. Once the staff record is created, specific access is determined by the Supervisor role that is given to the staff member. For example, a hall director should be able to schedule meetings with students. In the staff member account, this user will be given the right to schedule meetings, which will allow the user to schedule a meeting with any student. Then, this staff

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account will be designated with the Hall Director Supervisor role, which limits this user to only be able to create meetings with students in his or her location.

User Groups / Roles and Rights

Discussed in Training 1

To make user access more manageable and standardized, you will be able to create user groups and roles. Groups are used primarily for determining access to certain types of incidents. Roles are created to set up common user types so that all users of a specific user type have the same access. Specific user rights associated with each Group or Role will be discussed and a full description will be provided.

Note: There will also be a brief introduction of Picklists and Supervisors as it relates to assignments following Training 1.

Supervisors

Discussed in Training 1

In order for a staff member to be assigned cases, he or she will need to be designated as a “supervisor”. This will provide additional usability for the user when navigating Advocate.

Locations

Discuss in Training 1

Your buildings and other areas can be coded into Advocate for easy selection when reporting incidents. Rather than typing a location into a form, you will be able to select a location from a dropdown menu. You can then run reports to see how many incidents occur in each location as well as route cases based on where a student lives or where an incident occurred. Locations can be entered in manually or through an Excel import file.

Step 7: Tasks Following Training 1

After the first training call you will be able to complete the tasks in preparation for Training 2. Each task will come with a guide or information sheet to refresh your memory. You will be asked to input and set up staff accounts and user rights, begin to gather letters for inputting after the second training and to review forms in preparation for changes to meet your data entry needs.

Step 8: Process Call

During the Process Call with your implementation specialist, key members of the Core Training Group will meet with the Implementation Specialist to discuss the incident reporting process. The Implementation Specialist will utilize the questionnaire responses to advise the Core Training Group

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members on how to best utilize the Incident Reporting process to suit the institution's unique procedural needs.

Step 9: Transfer System Information to Advocate

To properly customize Advocate, the Client will submit one or more Client Extranet issues to transfer data files for customization purposes. This data file information will include: student information, including schedules and pictures, professional staff and student staff, buildings and rooms. This should be submitted to your implementation specialist one week prior to Training 2.

Step 10: Training 2

Incident Life Cycle

Discussed in Training 2

Each incident report entered into Advocate will follow a specific logic customized to meet your current incident life cycle. In this training we will discuss the default lifecycle in the system used by most schools. We can make any necessary adjustments to more closely mirror your current process. Minor modifications can typically be made by Symplicity Support and more complex modifications will be handled by Symplicity Development.

Picklists

Discussed in Training 2

Every dropdown menu in Advocate is customizable by the user in the Picklist Manager. Depending on the specific dropdown menu, additional options may be available for customization. Any modification to a picklist will take effect system-wide, meaning if you change a picklist item, it will change for everyone using Advocate.

Letter Templates

Discussed in Training 2

Advocate allows you to manage multiple letter templates to be used for corresponding with students. These templates will be configured with mail merge fields so that minimal work is required on a per-letter basis. After the second training you will receive a guide how to enter letter templates into Advocate and manage them over time when edits are necessary.

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Step 11: Tasks Following Training 2

Following the second training call you will be able to complete the following set of tasks in preparation for Training 3. You will also be provided with written instructions to assist you in further developing your skills using Advocate. The tasks to be completed after the second training include:

- Add Meeting Types
- Customize Picklists and Forms
- Configure Preference Settings for Charges
- How to Edit System Emails
- How to Add User Letter Templates

Step 12: Preferences Review

The Client Contact and Implementation Specialist will meet to discuss the various system preferences which may be applied to further customize the system. Charges and sanctions preferences and structure will also be discussed and reviewed.

Step 13: Training 3

The third training call will be used as a wrap-up call related to previously discussed items. Customizations and data entry will be reviewed to make sure that everything looks and acts as they should. Any additional questions can be covered during this call as well. If you desire, this third training may be expanded to include a larger group of additional staff members.

Step 14: Modules Training and Final Wrap Up

Advocate offers several modules that may be useful to your office outside of the general student conduct scope. These modules include the Care Network, Public Incident Reports, and Campus Safety Reports. We will provide training on the module of your choice to wrap up your deployment.

Care Network

Discussed in Modules Training

The Care Network has been developed to manage non-conduct related events which may require follow up and/or data collection by University staff. Separate from the incident report process you can stay aware of students of concern who technically have no conduct issues or in which alternative follow up is desired. Instead, a separate section of the system has been created to organize Care Reports while still keeping all Incidents and Care Reports associated with a single student record. Care Reports may be escalated to Incident Reports when needed. Special access is necessary to view the Care Network.

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Public Incident Reports

Discussed in Modules Training

A publicly available link is provided to your institution so that anyone in the community may file an incident report without requiring access to Advocate. This form is essentially the same as your common incident report form and can be accessed from anywhere to document an incident on or around campus. Subtle differences can be explained during the modules training if you would like to implement the public incident reporting component.

Campus Safety Reports

Discussed in Modules Training

Campus safety officers can have their own logging system in Advocate to keep track of daily activity around campus. This can be customized much in the way that the incident report can be customized to set up special notifications based on who or what is documented.

Questions or Concerns?

Please direct your inquiries to your Implementation Specialist.

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Addendum 1: Tips for Preparing Import Files

The three basic types of data capable of being imported are Students, Buildings, Rooms, Staff and Resident Advisors. Symplicity staff will assist you with your first imports. We also offer an automated import service.

Preparing your data for import:

1. Export your data to an Excel file and add a header row if one does not exist. Try to **name each column so that it matches the appropriate field in your Advocate system**. If no matching field exists, a field will need to be added - the header should make it evident what the column of data represents.

2. **All student, staff, and contact records must have a unique identifier** to ensure accurate mapping (ID numbers are the preferred unique identifier but email addresses may also be used.)

3. Each field must have its own column. Correct formatting would be:
   Salutation | First Name | Middle Initial | Last Name
   Mr. Robert J. Pendleton

4. Incorrect formatting would be:
   Address
   55 Main ST. Arlington, VA22209 United States
   In this case street address, City, State, Country, and Zip Code need to be in individual columns.

   Please refer to the import templates for additional examples.

5. If one does not already exist, create and populate a "full name" column for students and staff in addition to the ones for first name, last name, middle initial.

6. All dates should be in the format mm/dd/yyyy or yyyy/mm/dd

7. Multiple select picklists must be separated with a delimiter. Typically a comma (,) is used.
   For example: Contact Type
   Alumni,Faculty,Office Partner

   For hierarchical picklists you will need a hierarchical delimiter as well. Typically a forward slash (/) is used:
   For example: Major
   Business/Finance
   Science/Biology/Pre-Med