

## Release notes – 4.2

August 2020

The Advocate team is pleased to bring you the August 2020 release focused on data visualization and reporting, as well as Title IX changes to comply with the new U.S. Department of Education regulations.

Communicate the impact of your office on student wellbeing by using the new Custom Dashboard and Reporting Access features to create visualizations of information in the system and control access so that users can get the data when they need it. A new Batch Print Document feature allows users to generate a PDF of selected documents from the documents tab within an IR, TIX or CARE case record. Share the PDF with external users or interested parties as background information or evidence. Remain compliant with Title IX regulations when using the Title IX module to process your cases.

We hope you find these features helpful when using the system. The updated features and improved functionality will be available the **week of August 10th**. If you host your own data, please work with your Client Manager to select a date to receive the updates.

### Custom Dashboards

Custom Dashboards bring the ability to easily create visualizations of important metrics in your system. Utilizing the chart summaries within v2 reporting, staff users can configure three system dashboards with the items important for you to have at your fingertips. Highlight your case types and statuses, review student demographics or other important information collected within your Advocate system.

To create a custom dashboard, users with the new “Custom Dashboards (Manage)” user right can see custom dashboards in the left navigation menu.

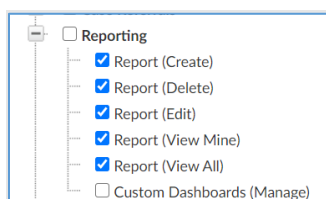


Figure 1: Custom Dashboard User Right

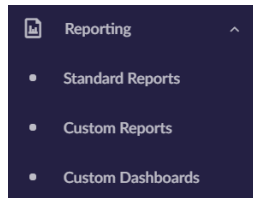


Figure 2: Custom Dashboards Left Navigation

Upon initial navigation to the Custom Dashboards section, the ability to “Add New” dashboard displays.

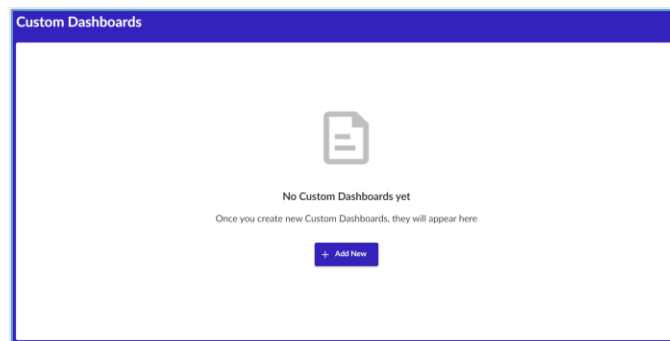


Figure 3: Add New Custom Dashboard

Each system is limited to three dashboards which can contain a total of 6 chart summaries. The three dashboards are not restricted to certain modules or areas of the system. A single dashboard may display information from multiple reports. For example, chart summaries from a report created under Incidents and CARE may display on the same dashboard. If multiple offices share your system, be sure to communicate how each office would like to use the three dashboards.

After selecting “Add New” the configuration panel for the dashboard displays. Enter the Title for the dashboard. In the “visible to” field select, decide which user groups will have access to view the data on this dashboard. You can select visible only to you, a specific group, or all system users.

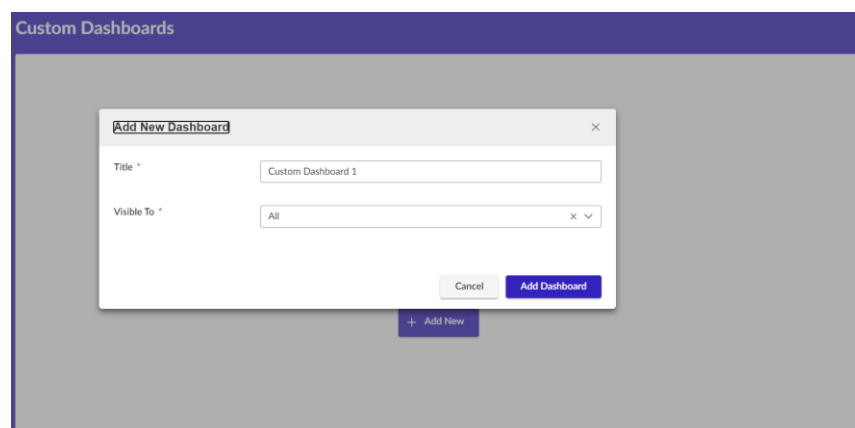


Figure 4: Dashboard Configuration

After creating the Dashboard navigate to the Standard Report or Custom Report section. You can either create a new report or utilize an existing report with summarized data. Upon viewing a report, navigate to the Summaries tab. On the chart summaries you can see an option to “Add to dashboard”

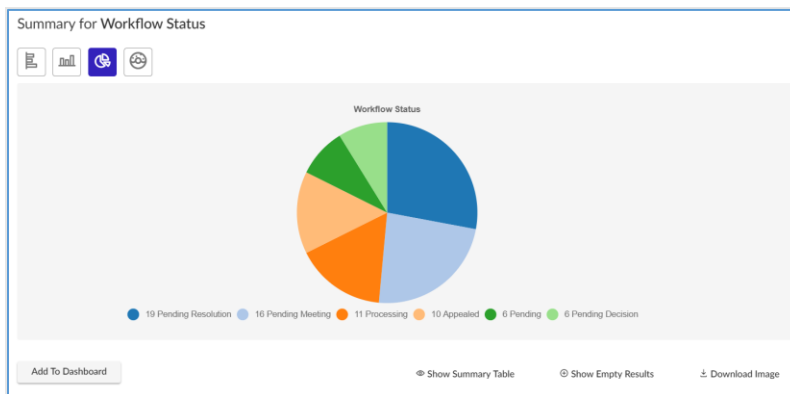


Figure 5: Add to Dashboard

Upon selection of Add To Dashboard, you are presented with the list of created dashboards, “add” the chart summary to the dashboards you would like it to display on and select save.

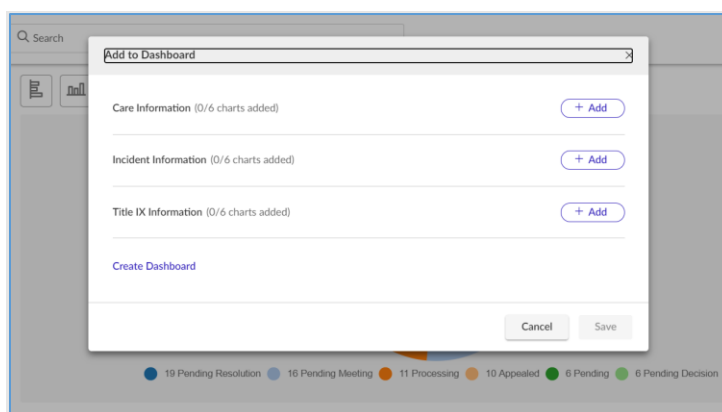


Figure 6: Add Summary To Dashboard

After adding the chart to a dashboard, a button displays to view the summary in the dashboard. You may also choose to add the same summary to additional dashboards using the Add to Dashboard button.

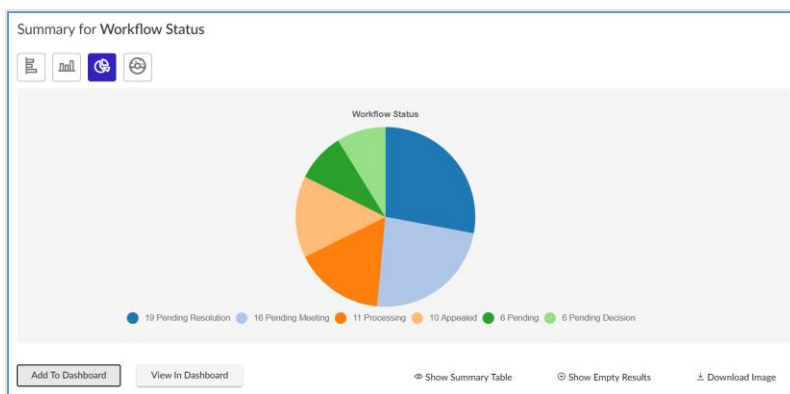


Figure 7: View In Dashboard

Chart Summaries added to the dashboard each display as its own panel on the dashboard. The title of the data, the name of the source report and the time the report last ran displays in the upper right corner. The chart summary data refreshes with each run of the report. It is recommended that any reports used to add chart summaries to the dashboard is scheduled so the data is periodically refreshed. We increased the number of scheduled reports for each system from 5 reports to 20 reports.

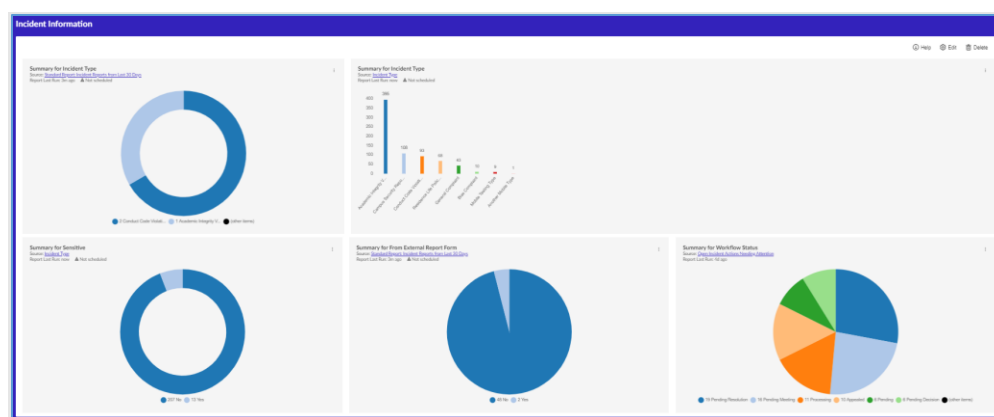


Figure 8: Dashboard with Chart Summaries

Users who have access to view the source report are able to link to the report. Users without access or without proper user rights are not able to access to the report. To remove the chart summary from the dashboard, click the menu in the upper right corner. You can also download the chart summary from here.

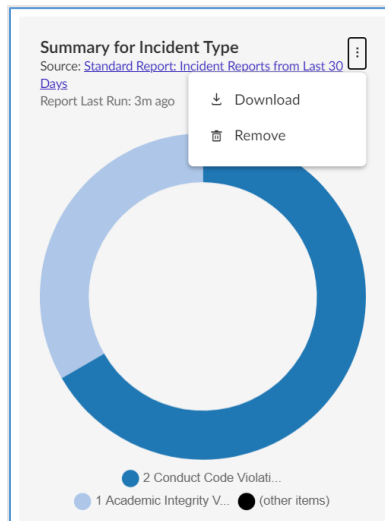


Figure 9: Panel Options

Users with the Custom Dashboard (Manage) right can see options in the upper right corner of the dashboard. “Help” provides information on how to use the Custom Dashboard feature. “Edit” displays the configuration window to adjust the title or access to the dashboard and “delete” deletes the dashboard.



Figure 10: Dashboard Options

## Reporting Engine Access Controls

We have added an option to the configuration panel of Custom Reports to allow for users to set who is able to access to the report. The new field, Visible To, enables users to select from three different options: All Users, Group Permissions and Only Me. All Users allows access to all users in the system regardless of reporting user rights, Group Permissions limits access to the selected user groups and Only Me limits access to the creator of the report.

**Tell us about your report**

Report Name\*

Report Description

Visible To

Only Me

All Users

Group Permission

Only Me

Figure 11: Report Access Control

Existing reports remain with the access they had prior to release. Access was based on the Reporting (view all) or Reporting (view mine). Any newly created reports are based on the new Visible To field.

Ability to create, edit and delete are still controlled by those specific user rights.

## Batch Print Documents

From the documents tab within an Incident, Care or Title IX case, users with the PDF Queue (Manage Mine) or PDF Queue (Manage All) user rights can see a batch option to Print Documents.

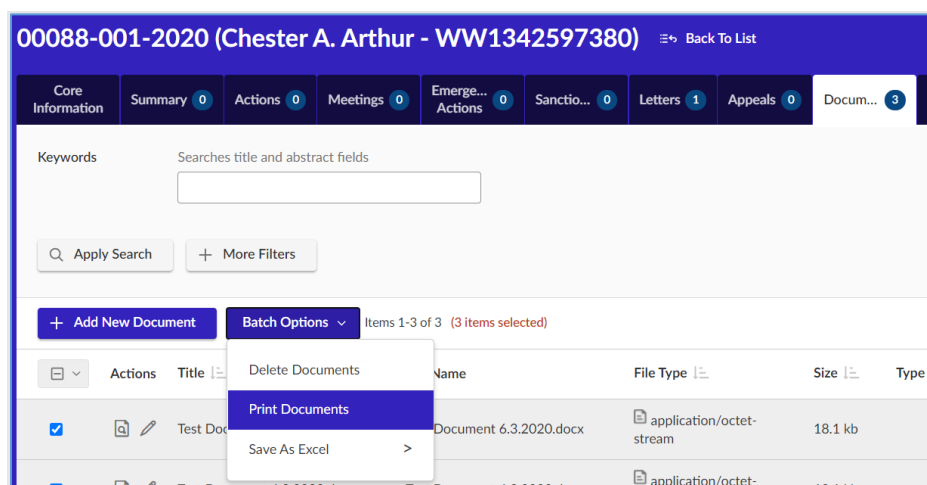


Figure 12: Batch Print Documents

Upon selection of the batch option, the file is generated in the PDF Queue under Tools>PDF Queue>Document Queue. The files are generated every 15 minutes. Once completed, a PDF icon displays. When clicked, the file downloads with all selected documents. NOTE: Only documents of the types txt, doc, docs, jpeg, png and pdf are merged into the file.

## Title IX Regulation Changes

We enhanced the Title IX module to ensure compliance with new August 14, 2020 Title IX regulations. Changes include the ability to assign Advisors to Respondents and Complainants within the case, adjustments to the intake form to match new definitions, and workflow configuration for processing of cases that occurred prior to August 14, 2020.

## Title IX Advisor

An Advisor tab and sidebar panel have been added to the Title IX case record. Advisors can be added as Contacts in the system and then assigned to the Respondent or Complainant of a case. Advisors can be created manually via Tools>Contacts>Add New, by using the import tool or when assigning an Advisor in the Title IX Case.

To assign an Advisor to a case, select “Add New Advisor” from the Advisor tab or “Manage Advisor” in the sidebar panel.

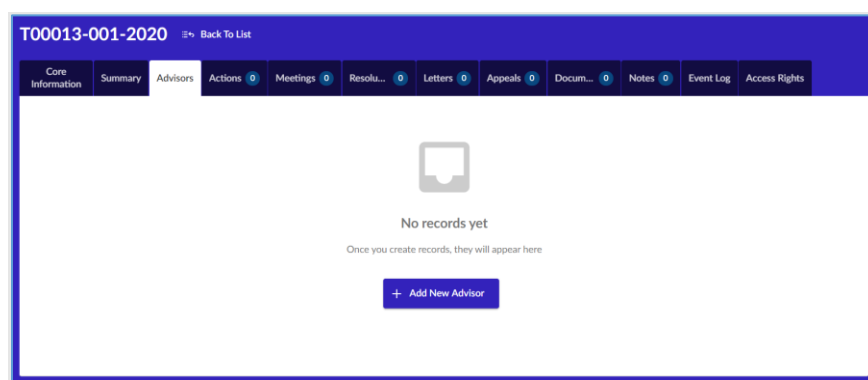


Figure 13: Add New Advisor

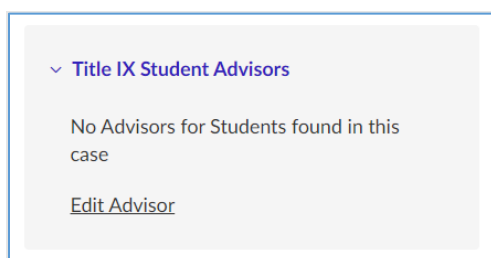


Figure 14: Advisor Side Panel

Once the Advisor form displays, select the respondent or complainant you want to add the Advisor for by either choosing an Advisor from the selection field or Add a New Advisor record.

Figure 15: Assign Advisor Form

Upon submission, the Advisor record is created for the involved party that was selected. Only one advisor record per individual may exist. You may add multiple advisors to an individual by editing the existing record. Advisor information added at the parent case level flows to the child cases and vice versa as adjustments are made.

### Title IX Advisor Letter Merge Codes

Three new merge codes were created to allow inclusion of Advisor assignment information.

1. [titleix\_advisor\_recipient\_specific]: Only merges in the Advisor information for the respondent or complainant recipient
2. [titleix\_advisor\_all\_complainant]: Merges in all complainant and advisor information
3. [titleix\_advisor\_all\_respondent]: Merges in all respondent and advisor information

### Title IX Advisor User Rights

Four new user rights control which users have access to the Title IX Advisor information. Title IX Advisor (Create), Title IX Advisor (Delete), Title IX Advisor (Edit), Title IX Advisor (View).

Figure 16: Title IX Advisor User Rights

### Title IX Intake Form Changes

Adjustments were made to definitions and field blurbs to meet the new guidelines. To ensure system data prior to August 14, 2020 remains as is, and to allow for processing of cases that are reported after but occurred prior to August 14, 2020, a new field was added to the form and configured to display new or old definitions and blurbs based on the selection.

The new field “Did this occur prior to Aug 14, 2020?” allows for three selections.



1. Yes: Displays the old definitions and blurbs
2. No: Displays the new definitions and blurbs
3. Unknown: Displays the new definitions and blurbs

Figure 17: New Field

Since regulations allow for institutions to choose if cases that occurred prior to August 14, 2020 are processed using the new or old regulations, we created a system setting that allows users to input a date for when the “Did this occur prior to August 14, 2020” field displays.

Under System Settings>Title IX Manager>General>#12>At which date should the system default to the new August 14, 2020 Title IX Regulations. Once a date is entered and when that date has passed, the TIX intake form will no longer displays the “Did this occur prior to August 14, 2020?” question and all field definitions and blurbs will reflect the new regulation information.

Figure 18: System Setting

## Additional Title IX Recommendations

In addition to the functionality we’ve built for the new regulations, we have some recommendations about how to leverage existing Advocate features to support compliance with the new regulations.

### Supportive Measures

When a Title IX public report has been received or when a report has been created, our recommendation for documenting and implementing supportive measures for both the complainant and respondent is to use Title IX Actions. There are two different ways they could be used; each supportive measure could be their own action, or one action can be created, and the supportive measures are added as checklist items.

## Formal Complaints

Our recommendation is that the public form is not used as a formal complaint, because there is not a way for the complainant or the Title IX coordinator to sign the complaint. Instead, we recommend creating two letter templates for formal complaints: one for the complainant and one for the respondent. If the complainant decides to move forward with a formal complaint, our recommendation is to complete and send them the complainant formal complaint letter using the template, asking them to sign and return it. Then upload the signed letter to the case and click Edit Details when uploading:

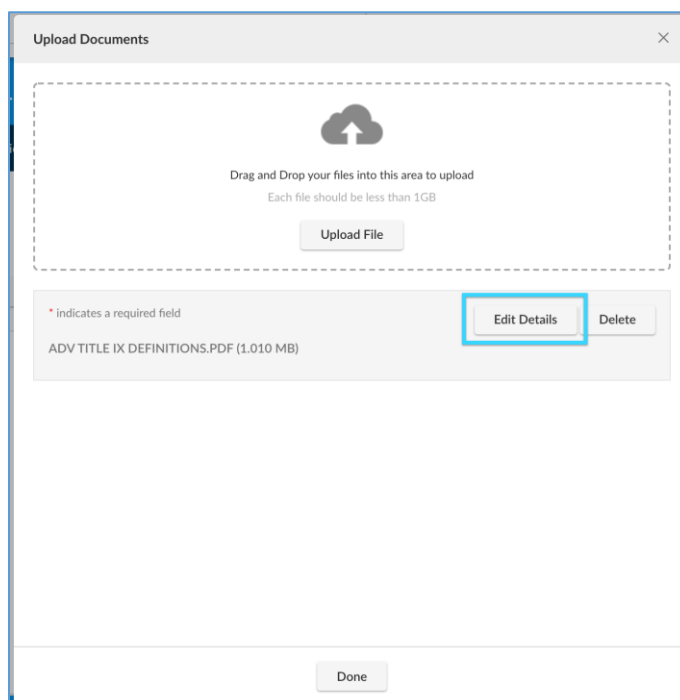


Figure 19: Document Upload

After clicking Edit Details, a form will appear for adding extra details about the document. The important thing is to set the Status as Final (this is just an internal designation).

Upload Documents

\* indicates a required field

ADV TITLE IX DEFINITIONS.PDF (1.010 MB)

Document Title \*

Document Type

Privacy Type ☒ Semi-Private ☐ Private

Description

Status ☐ Draft ☒ Final

Figure 20: Edit Details

By setting the Status as Final, the document will appear in the attachments list of the letter creator. Once the signed complainant letter is uploaded a letter can be created to the respondent using the respondent letter template with the signed formal complaint as an attachment.

To track formal complaints, flags can be used on the case. There could be flags for if a formal complaint is waiting for complainant signature or if a formal complaint has been filed.

## Evidence Sharing

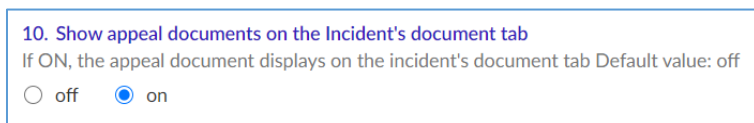
To share evidence with the parties, our recommendation is to gather the evidence into one document using the new batch print feature. Once it's gathered it can be uploaded to the case in the same way as the formal complaint (outlined above), marking the Status as final so it appears in the attachments list. Then by using an evidence sharing letter template the evidence can be shared and the case has a record of it being sent.

## General Enhancements

In addition to the above features, the following enhancements are also included in this release:

- **Appeal Documents in Case Documents Tab:** A new system setting was added to give the option to display Appeal documents in the Case Documents tab. Currently Appeal documents are specific to the Appeal form and do not display within the overall case documents tab. System Settings>Incident

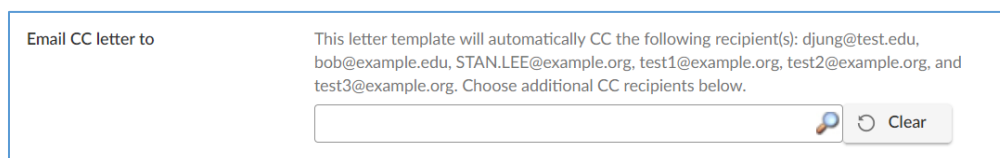
Reports>General>#9 and System Settings>Title IX Reports>General #6. When these are enabled, Appeal documents will display in the case documents tab. NOTE: if the system setting to display case documents in the student documents tab is enabled, this will also include the Appeal documents. if the setting is enabled, Appeal documents will also be included in Hearing Packets.



10. Show appeal documents on the Incident's document tab  
If ON, the appeal document displays on the incident's document tab Default value: off  
☐ off ☒ on

Figure 21: Appeal Document System Setting

- **CC Merge Code include CC on Template:** The existing merge code [letter\_cc\_address], was adjusted to include addresses entered in the CC field on the letter template. For emails entered in the CC field of template, the address will merge into the letter body. When sending a letter, the CC field was adjusted so that it displays the email address on the template so the user is aware the individuals who are receiving the letter.



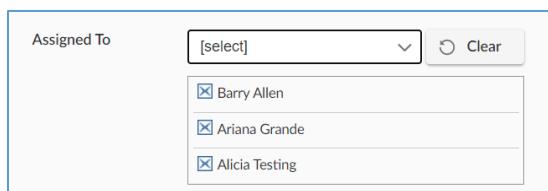
Email CC letter to

This letter template will automatically CC the following recipient(s): djung@test.edu, bob@example.edu, STAN.LEE@example.org, test1@example.org, test2@example.org, and test3@example.org. Choose additional CC recipients below.

Clear

Figure 22: CC Letter Template

- **Assigned to Filters:** Assigned to Filters on IR, CARE and Title IX list views were adjusted to multi-select fields.



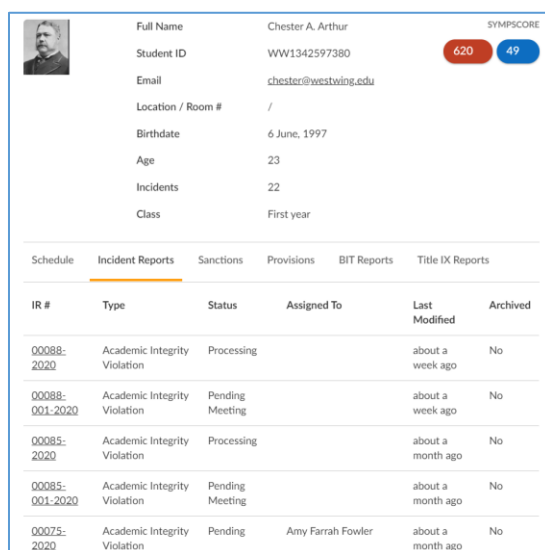
Assigned To

[select] Clear

- ☒ Barry Allen
- ☒ Ariana Grande
- ☒ Alicia Testing

Figure 23: Assigned to Filters

- **Report Type Column Student/Employee Inset Form:** Report Type column was added to the student/employee inset form to allow users to see the type of reports the individual has been involved in.



The form displays student information for Chester A. Arthur. It includes fields for Full Name, Student ID, Email, Location / Room #, Birthdate, Age, Incidents, and Class. A SYMPScore section shows two scores: 620 and 49. Below the form is a table of Incident Reports.

IR #	Type	Status	Assigned To	Last Modified	Archived
00088: 2020	Academic Integrity Violation	Processing		about a week ago	No
00088: 001-2020	Academic Integrity Violation	Pending Meeting		about a week ago	No
00085: 2020	Academic Integrity Violation	Processing		about a month ago	No
00085: 001-2020	Academic Integrity Violation	Pending Meeting		about a month ago	No
00075: 2020	Academic Integrity Violation	Pending	Amy Farrah Fowler	about a month ago	No

Figure 24: Inset Form Report Type

- **YYYY Field Data Merge Fix:** Date fields configured to collect data for year only, were not displaying properly when merged into letters. This was addressed and now merges in correctly.

## Sunseting Support of Internet Explorer 11

With Microsoft Internet Explorer 11 market share below 5% and declining, we have decided to stop supporting IE 11 for Advocate. Microsoft's security chief point to Internet Explorer as a backwards compatibility solution at this point. "We're not supporting new web standards for it and, while many sites work fine, developers by and large just aren't testing for Internet Explorer these days. They're testing on modern browsers." <https://techcommunity.microsoft.com/t5/windows-it-pro-blog/the-perils-of-using-internet-explorer-as-your-default-browser/ba-p/331732>. In addition, Microsoft's support site states: "Windows 10 features Microsoft Edge. Microsoft recommends using Microsoft Edge as your default browser and supports Internet Explorer 11 for backward compatibility." We will continue to support other browser environments that better reflect clients' usage patterns (Chrome, Edge, FireFox, and Safari).

If you have any questions about the features, please contact the help desk at (703) 373-7035, or your Client Manager.