IUPUI Symplicity MSE – Memorandum of Understanding

Last Revised: 12/17/2015

Approved by the Career Services Council Executive Board: 03/23/2016

1. Mission
   a. The mission of this memorandum (MOU) is to create the framework for shared settings within the IUPUI Symplicity MSE software.

2. Roles and Responsibilities
   a. All partners in this MOU agree to follow the system setting commitments as outlined in this document.

3. Symplicity Advisory Committee Meetings
   a. Committee will meet at least twice per semester
   b. All participating instances agree to send a minimum of one representative to all meetings

4. System Settings
   a. General
      i. To assist administrators in recognizing the various staff members using the system, administrator accounts in the system should use the following naming convention. “First Name Last Name (School)”
   b. Users/Groups Access
      i. The following Groups and corresponding permission settings will be used to assign appropriate access to all administrative accounts in the system
         1. Multi-System Administrator
         2. Administrator (Super User) –
            a. Access Level: full access to all instance features and capabilities
            b. Job Function: Persons responsible for day-to-day operation, managing instance functionality and settings, or employer relations/OCR management staff. Note: This person may also act as advisor or ER Manager depending on office organization. This group is the only group with permissions for mass emailing.
         3. Advisors/Directors (will rename “Advisors”)–
            a. Access Level: Access to student database, full counseling module, events management, kiosk module, employers, jobs, student management – student notes. Note: This group is not permitted to have access to Tools, Contacts, or Mass Emailing
            b. Job Function: Career Advisors/Direct Student Services
         4. Advising Manager
            a. Access Level: Same as above plus Tools -> Emails.
            b. Job Function: Manager of advising or student services functions
         5. Job Manager
            a. Access Level: Create, approve, and edit Jobs (non OCR)
b. Job Function: Staff members responsible for managing non-ocr jobs only

6. Student Hourly
   a. Access Level: Student Management - student activity, Counseling – Full access
   b. Job Function: student hourly workers

7. Clerical Staff
   a. Access Level: Full access excluding Tools, Mass Email, and counseling notes.
   b. Job Function: Assist other career services staff as needed with student and employer accounts, jobs, events, appointments, etc.

8. Peer Mentor
   a. Access Level: Student Management – student activity, Counseling – Full access
   b. Job Function: Undergraduate student peer advisors (conducting resume review, interview coaching, and overview of services).

   ii. In cases where someone’s job function includes parameters that fall outside an existing user group, individual user rights can be altered with the permission of the instance’s Symplicity lead.

   iii. Administrator (No Tools) – All instances understand that Symplicity policy states that only one person from each instance can be given Symport access. Because of the delicate nature of this access, it should only be given to the most detail-oriented person within that unit.

   c. Picklists
      i. System picklists settings were determined during the implementation process and should only be altered by the Multi-System Administrator
         1. Change Process - Any proposed changes to picklists should be emailed to the Multi-System Administrator (Matthew Rust mmrust@iupui.edu) at least one week prior to the next Symplicity Advisory Committee meeting. The proposed change will then be added to the agenda for the upcoming Committee meetings. The decision will be made collaboratively during the committee meetings.

d. System Managers
   i. Please check with your local data access coordinator to ensure that any faculty/staff member requesting access has completed the FERPA tutorial and the data acceptable use agreement. If you do not know who your access coordinator is, email Matt Rust (mmrust@iupui.edu) with the user ID (e.g., mmrust) of the person requesting access and he can verify. Note that this is also true for student workers being added to help administer your system.
      1. Data Acceptable Use Agreement: https://ams.iu.edu/UserAgreements/Agreement.aspx
      2. FERPA tutorial: https://ferpa.iu.edu/
ii. UITS will be auditing quarterly to ensure all current users with faculty/staff access to the system have in fact completed the FERPA tutorial and data acceptable use policy. Consider having your data access coordinator check all of your school’s current Symplicity users.

iii. Acceptable Use agreement and FERPA tutorial should be reviewed and re-acknowledged on an annual basis by each individual staff member.

iv. Instances should use departmental email accounts to send mass emails due to whitelisting issues.
   1. If no departmental email address exists instructions are here to create one.
   2. After confirmation of new email address email Matt Rust (mmrust@iupui.edu) to get it whitelisted.

5. Module Specific Collaborative Processes
   a. Counseling Module
      1. Notes related to student advising records should always be recorded through IU advising records (AdRx). Access to AdRx can be obtained by emailing Matt Rust (mmrust@iupui.edu)

   b. Contact and Employer Database
      i. Approving new employers
         1. Careful attention should be paid to reviewing possible company matches in the approval process. If the employer is determined to be a duplicate request, the employer records should be merged not approved.
         2. If the employer record is determined to be unique, the employer can be approved. In cases where the employer is related to an existing employer account, the employer record should be associated with the existing record in the system.
         3. New employers should be affiliated to IUPUI Talent.
         4. The new employer should be checked against the Blocked Employer list (see below) prior to approval.
      ii. ER notes should be taken at the employer level not the contact level. Only person-specific notes should be tied to the contact account. If it is your intent that a note be counted towards annual metrics reporting, the note should be recorded at the employer level.
      iii. Blocked Employer List. Search the employer database by the keyword “blocked” to see employers that are not permitted to post positions within the MSE. This list will contain companies/organizations that repeatedly violate posting or on-campus recruiting policies, companies/organizations that are determined to have not acted ethically, and/or companies/organization that are not appropriate for promotion to IU students.
c. **Job Posting Approvals**  
i. A Blocked Employer List will be created for organizations that are not permitted to post in the MSE.  
ii. Posting approval process: Review Blocked Employer List, review posting guidelines, review affiliation requested by the employer and add affiliations based on major or industry when appropriate.  
iii. Posting triage: each instance will appoint at least one staff member to serve as the job posting manager and member of the Symplicity Advisory Committee. That person will be added to the Symplicity Advisory Committee listserv (symplicitycouncil-l@iupui.edu). If a question regarding the approval of a specific job posting arises, the listserv will be used to seek feedback from the group in determining the appropriate action to take when reviewing questionable job postings.  
iv. The approach of the MSE in approving jobs: We follow the affiliation request indicated by the employer when posting a job. Affiliations are NEVER removed by a job approver (outside his/her own school). If the job approver feels that affiliations should be added, he or she should add the relevant instance at his or her own discretion.  
v. Onestop postings are set to auto deny after they have been left in the pending bin for 7 days without being approved or rejected by an administrator.  
vi. **Approval Five Days After Proposed Posting Date.** After pending jobs have been affiliated with relevant units, instance representatives will have until five days after the employer-submitted posting date to remove their affiliation, approve the job, or—if they are the last remaining affiliated unit—reject the posting. All pending jobs still awaiting approval five days after the employer-submitted posting date will be batch approved by Campus Career and Advising Services.

d. **Student Database**  
i. **Student Affiliations**  
   1. All undergraduate students in the system will be affiliated with their school’s instance (if their home school has an instance) and JagJobs. (JagJobs will not affiliate graduate students including Dentistry, Law, or Medicine. This also includes all alumni).
   2. When a student graduates their affiliation will be changed so that they are only affiliated with their school’s instance  
      a. All affiliations will be removed for students with the exception of the affiliation for the student’s home instance  
      b. Whenever the individual instance decides that they want to remove their alumni access, they are responsible for doing a detailed search for alums and removing affiliation access  
      c. A message should be sent by each instance to its alumni at the point of degree conferral explaining how alumni services work
within their school and how to change login credentials away from CAS in situations where that is necessary
d. Undergraduate students who are graduating and moving directly into graduate programs at IUPUI will maintain affiliation with both schools

ii. Merging Student Accounts

1. Go to Students > Duplicate Search tab.

2. Select your desired search criteria. If more than one option is selected, records must match on all criteria.

3. Records that match the criteria will be displayed on the results page. Under the Duplicates column, click the link showing the number of matches to display the individual records.

4. Select the desired records to be merged and use Batch Options > Merge. If you’re deleting, that option is under Account > Archive (Delete).

When merging, managers select which student record should be retained. Data for the student(s) not selected will be merged into the one that is retained.

All student activity (e.g., interviews, applications, counseling, etc.) will be merged to the single remaining record, however the retained student’s profile and password will NOT be updated by the merge. As an example: Student A has applied for jobs and Student B will be the new primary account holder. After the merge, Student B will keep his or her existing profile info but will now also have Student A’s job applications.

Managers should review the result of merged accounts to ensure that any duplicate applications, interviews, RSVPs etc. are addressed since the system is unable to determine which specific activity should be retained.

5. For duplicates where one account has all activity and the other has none, it’s best to simply delete the unused record.

iii. Managing Alumni Access

1. Alumni are sent to the XXXX-csm.symplicity.com/students page of their degree school’s instance to request an account.

2. When the account request is received a system manager should first check the existing student database to ensure that a current record for the student does not already exist.

3. If the student does not already have an account in the system, the manager should attempt to find their student ID in SIS, enter the
appropriate student ID and then approve the account. (Social Security
numbers should never be used or stored in the system.)

4. If the student already has an account in the system, the account request
should be denied and the existing account updated to include the
appropriate affiliations.

5. When approving an alum’s request you must access the profile and turn
on the alumnus(a) field. This will allow the for the email address to be
editable.

6. Alumni should only be affiliated with the school from which they
graduated.

e. Career Fairs

i. Career fairs should be named using a convention that lets students know who is
eligible to attend and who is hosting the event. If all IUPUI students are eligible
to attend a fair, the unit will name the Career Fair with “IUPUI” at the beginning
and add “Hosted by” with the name of their school at the end.
   1. Example – “IUPUI Summer Camp Job Fair (Hosted by the School of
      Public Health)”

f. Document Library

i. Each unit agrees to include the name of their school in the name of each
document stored in the library.

ii. The Document Library has a 100mb limit for the entire system so be judicious
about storing files there.

iii. No student documents are allowed.

iv. All documents placed there are visible by all system users including staff,
   students, and employers.

6. Change Management (Collaborative processes defined)

a. Changing the MOU

i. Members wishing to change the MOU should submit an agenda item to discuss
the proposed change during the monthly call for agenda items.

ii. The person requesting the change should bring justification for their requested
change to the monthly Symplicity Advisory Committee meeting and present
their case to committee members for consideration.

b. Collaborative Communication

i. An email listserv will be used to communicate with all committee members.
   1. Immediate committee member concerns that need to be discussed
      prior to the next scheduled committee meeting
   2. There will be a monthly call for agenda items sent out by the acting
      committee chair