

Sonia Zen

Getting Started with Sonia



setting the standard for student placement software



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1 Introduction

This document is part of the Sonia Zen series. Sonia Zen documents aim to provide practical, step by step guidance in the use of Sonia. Each document is intended to be self-contained, concentrating on a small number of processes or skills.

As its name implies, this document should be read by someone very new to Sonia. It covers the following tasks:

- Starting Sonia
- How does Sonia map to your processes
- Typical steps in managing placements

2 Starting Sonia

Launching the Sonia application on your computer is usually the same as starting any application. There may be a "Sonia" shortcut on your desktop or you will use the Windows "Start" menu to locate the application. The steps you will need to follow will depend on factors such as the version of Windows you are using and the way your IT department provides access to applications.

You may be prompted for authentication details (this will depend on your university network):



You may also be prompted to choose the instance of Sonia you with to work with:



Sonia uses your credentials and selection to ensure you only work with data you are entitled to see. Staff in the faculty of Education would only see "School of Education" in this list.



Once you have selected the school you are going to work with, the main Sonia application window will appear. For a description of all of the features of the window, please see the Sonia Reference Manual.

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🔒 Allan, Victoria			AdvMP14	Adv Clinical Mental Health Placement Adv Macro Policy Placement	2014	macro-policy	1/09/2014	1/05/2015	1	0	1	0	0	0	-
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			Count: 5						Total: 617	Total: 591	Total: 24	Total: 216	Total: 11	Total: 3	3
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If this is a brand new installation of Sonia, there may be very little data in the system, but you may be in the situation where you are taking over an existing Sonia database, populated with several years' worth of information.

3 Customising Sonia Terminology

The terminology used in different universities and schools varies considerably. What one university calls a course another calls a subject. You may call the organisations that provide placement positions "providers" while another school in your university calls them "hospitals". To cope with these differences, Sonia can be configured to display your preferred text for a wide range of items on screen.

This is done via the Options screen. More details on this are in the Sonia Reference Manual.

This document uses the default Sonia terminology.



4 Mapping Sonia to your processes

Sonia is designed to be flexible enough to handle student placements for many different university and faculty requirements. This design as evolved as more universities use Sonia and add their unique attributes to the system.

To understand how Sonia will support your requirements, it is important to know the pieces of Sonia and how they relate to student placements.

When planning placements, consider the basic questions: who, what, when and where.

Question	Object	Description
Who?	Students	Who are the students that need to go on placement? This will be determined by their enrolment and perhaps other factors such as previous placements
What?	Area	What will they be doing on placement? For example in Education you might be placing students in Secondary, Primary etc. In Nursing it might be Surgical, Medical and so on. This identifies what they will be doing on placement.
When?	Placement Group	When will students be going on placement? A Placement Group specifies the dates that a group of students will be going on placement.
Where?	Sites	Where are students going for placement? A site is the provider of the placement. For Education it would be a primary school or secondary school, for nursing it might be a hospital or a ward within a hospital.

The most common process flow for managing student placements follows these steps:

1. Determine **when** your placements will occur, and **what** activities will be covered - set up your Placement Groups. This is usually done well in advance (ie for next year).

2. Determine **where** your students will be able to be placed. This involves canvassing sites to see if they can provide suitable placement experiences in the date range you require. Quite often this list of sites is well known to you as they are used at the same times each year. If your student numbers are growing this process can be difficult as you try to find additional sites. This process is usually started well before students are enrolled.

3. When you know which students are enrolled in courses that involve placements, you can begin to determine **who** of the students need to be placed. This may also take into account how many sites you have managed to find in step 2. For example if you have found 100 Primary school places, but you have 200 students enrolled in your course, you will need to have a strategy in place to cope with this.

4. Once the numbers of students line up with the number of places you can begin the process of matching students to places. This may involve many criteria.

5. The placement occurs.

6. You collect results, run reports, mark the placement as completed and start on the next one!

In Sonia terms:

- 1. Create placement groups
- 2. Find sites and add them to a placement group as a "placement requests"
- 3. Add students to placement groups
- 4. Students may be given the chance to nominate preferred sites to attend, you allocate students to a site
- 5. Students are away on placement
- 6. Run reports and mark the placement groups as "completed".



5 People and Roles

Role	Type of user	What can they see/do?
Placement officer	Sonia client user	This person can see and edit all data for their school. They can add/edit/impersonate/export/email et cetera
Placement officer	Sonia client user	A placement officer may be given access to adjust some
(+Uni level)		university-wide settings in Sonia
Coordinator	Sonia client user	This is a read-only version of a placement officer. They can see all data using the Sonia client but cannot alter or add data.
Student	Sonia web portal <i>Student</i>	Students can see information about placements they are involved in. They cannot see other student's data
Supervisor	Sonia web portal <i>Supervisor</i>	Supervisors are people who work for the university or who are hired by the university. They are assigned students based on site and date. Therefore they may supervise quite a number of students in a range of placement sites throughout the year. Supervisors can use the Sonia portal to determine who and where they are supervising. They can upload documents against each student, can leave notes for their students and can fill in electronic forms assigned to them and their students.
Subject	Sonia web portal	(Preliminary information, to be confirmed in 2015) This role
Coordinator	Supervisor	associates a Supervisor with a Subject. All students enrolled in that subject will be visible to the subject coordinator.
Site Contact	Sonia web portal	Any person associated with a site. Usually an employee of the
	Site	site. Picked by the site, not by the university.
Primary Contact	Sonia web portal <i>Site</i>	A site contact who has an overall coordinating role for placements in the site. This person receives emails/letters directed to the site. This person can see all of the placements/students assigned to their site.
Secondary	Sonia web portal	(Preliminary information, to be confirmed in 2015) Multiple
Contacts	Site	secondary contacts. Have access to see all students at the site.
Student Contact	Sonia web portal <i>Site</i>	A Site contact whose name should be displayed to students. This is often the primary contact, but many sites have separation of the roles. They can see all students allocated to their site.
Mentor	Sonia web portal <i>Site</i>	A site contact who has been assigned to a student on placement in their site. Examples would be classroom teachers (Education), preceptors (Health), Field Instructors (Social work). Mentors can only see the students assigned to them using Sonia's "position" data on a placement.

The following table summarises the different roles available for people in Sonia

In summary, if someone is employed directly by the university to look after students in multiple locations, they are probably a Supervisor. Otherwise they are a Site Contact. Site contacts who need to monitor all students at their site are probably Primary or Student contacts for the site. Site contacts who only get to see students assigned directly to them are Mentors.



6 Creating a Placement Group

To create a new Placement Group, launch a new Placement Group window from the Sonia toolbar and click the "New" button on the Placement Group toolbar. A small window will pop up (see below) prompting you for a unique Placement Group Code.

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Pl	acement Groups Summa	iry Search			
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Active Filtere			Empty Recor	ď	•
			▼ Ends No date ▼		
			Close No date/time		
Last S	Saved: N/A Saved By: N/A				

Note: if you need to create a series of placement groups, each the same apart from a different area, try using the New button's "Create a block of placement groups" option.



6.1 Placement Group Codes

Each placement group in Sonia needs a unique code. The code can include any characters and can be up to 50 characters long (although having 50 character placement group codes is NOT recommended).

It is highly recommended that you come up with a consistent, meaningful standard for the code. This should match your unique requirements, but keep in mind a placement group represents **when** and **what** a group of students will be doing, so incorporating a coded version of when and what is not a bad starting point. As an example in the image below the code entered is "10S1G1_MED".



This code was created using the following rules:

"10" = the year - 2010

"S1" = the semester

"G1" = the first group of students going out this semester

"MED" = the placement is in area "medical"

You are encouraged to create (and document) your own meaningful coding standard.



6.2 Filling in the Placement Group Form

After entering the placement group code you can then begin to fill in the details on the placement group form.

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Place	ement Groups Summar	y Rost	er Search								
New	Open Copy Refresh Actions	Save De	ete Details Students Plac	ement Rankings	Interviews Paym	ents Settings Che	cks Notes Do	Comments Electronic Log Alloc Stuce Alloc	ocate dents cation		
	(AdvCFC14) / 2014 clinical-familie 1/09/2014 to Requested: 58	Adv Clini es and chi 1/05/201 34, Confin	al Families and Children dren ned: 575, Students: 62, Pre	Placement	cated: 5, Liaisor	ıs: 2					
	General		•								Â
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	Event		From	То			V	Field Instructors required			
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	Agencies can add i	nterviews	4/12/2014 12:00:00 AM	28/12/2014 12	MA 00:00:		7	Allocations finalised to liaisons			
	Review		6/11/2014 3:30:00 PM	1/01/2015 3:30	0:00 PM		V	Allocations finalised to agencies	5		
	Preferences		6/11/2014 3:30:00 PM	1/01/2015 3:30	0:00 PM			Placement completed			
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The name of the placement group is seen on the web site and in report so should be clear and concise and not include terms and codes that only mean something to you.

The optional Block Code is a way of identifying and grouping several placement groups. You can add new codes using the plus button, or pick an existing one from the drop down list. In our example the block code of "2014" is going to be common to a series of placement groups.

The estimated places field is just a budget reminder for you to help future planning.

The comment field will appear on the web site and should therefore provide a basic overview of the nature of this placement.

The dates indicate when the placement will occur. The Key Events area defines date ranges for placement activities that you wish to include in your placement model. This includes things such as students entering preferences and sites being able to plan interview timeslots.



7 Adding Sites to a Placement Group - Placement Requests

To associate a site with a placement group, you need to create a placement request. This can be done in a number of ways in Sonia. These include:

- 1. from within a site
- 2. from within a placement group
- 3. after searching sites, adding a placement request to all of the sites found
- 4. by copying the placement requests from another placement group

Each or all of these methods can be used to create your placement requests.

7.1 From within a site

	(RAH-EM) - RAH - Emergency
Site Search New Open Save Delete Details Subsites Contacts Super Actions Actions	visor Placement A ributes Checks Notes Documents Log & Links Options
(RAH-EM) - RAH - Emergency North Tce 123 Adelaide SA Australia 5000 1423424 jkirk@enterprise.com Placements Year 2010 + Mar '10 (Medi_Apr2010) - 2nd Y(Aged_Dec2009) - 6/03/2010 - 2/04/2010 - 30/04/	24/09/2009 erterter Select Placement Group X [Surg_2009C2) - 1st Year Semester 1 Surgical Placements - 2nd C X (IDSIG1_MED) - 2nd Year Semester 1 Medical X (Comm_Nov2010) - 2nd Year Semester 1 Surgical Cleincent - Comm X (Burg_Aro2010) - 2nd Year Semester 1 Surgical Cleincent - Comm X (Medi_Nov2009_2) - 3rd Year Semester 3 Placements X (Medi_Nov2009_2) - asdf X (A1000) - First year Semester break Makeup YG_JT_01) - Justin's Test Placement Group OK Cancel
Last Saved: 12/11/2009 12:13:00 PM Saved By: PLANET\dean	

The image shows an open site window after the Placement Requests button on the toolbar has been clicked, and the "add" button has been clicked. It brings up a list of available placement groups to select from.



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Plac	ement (Group	s	Summary I	Roster Search						0		100				
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tive				Cairns After	То	1/06/2015								0	0		
Ă		+		Cairns Early	Shift	Weekends							•	2	2		
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				CHINCHILLA		request f	or the site							0	0		
				DALBY STAT						ſ		<i>c</i> 1		0	0		
				Egg Nogg P							Add	Close		0	0		
		*		EMERALD PK	INIANT COMITTIEU						۷	۷		2	0		
		٠		FRASER COA	ST STA Confirmed						1	1		1	0		
		+		GLADSTONE	COLLE Confirmed						1	2		0	0		^

7.2 From within a placement group

The image highlights the requests button on a placement group form. Clicking the "add" button to the right of the form will bring up the "Select Site" window where you can choose an individual site (and number of places) to be added.

Note that you can choose to add a site multiple times to the same placement group – perhaps on different date ranges or shifts.



7.3 By searching sites

ite	e Code		x	Site Name			x	
lo	te		х	Area	Medical	-	×	
Ð	Add Criteria	•					Search	
	Code	Name				Phone	Sector	
	ЈТВН	John the Baptish Hospital						1
	RAH-EM	RAH - Emergency				1423424	Public	
	RAH-O	RAH - Oncology ward				838934893984	Public	
		PAH Deadistries				08 28218812		
	KAH-P	KAH - Paediatrics						

The image shows the Site Search tab, a search for sites with an Area of "Medical" has resulted in 5 hits. The "New Placement Requests" button will prompt the user for the placement group and then placement requests will be generated for each of the 5 sites.

			(Surg_	_2009C2) - 1st \	'ear Se	mester 1 Su	rgical Pl	acement
Placement Groups Summ	arv Search								
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Placement	t Requests			Sho	W				Alle
Surgical 2/12 ZOUP TO Requested: 5,	14/12/2009 Confirmed: 44,	S udents:	80, Prefei	rences: 0), Alloca	ited: 4			
General									_
Code	Surg_2009C2							Area	5
Name	1st Year Seme	ster 1 Surg	ical Place	ments -	2nd Co	hort		Block	Code 8
Estimated Places	0 🌻							Hour	s

7.4 Copying from another placement group

The image shows a very useful option in Sonia. It allows you to copy the placement requests from an existing placement group to a different placement group. To do this, open the group that has the existing placement requests - in the example above, there are 44 confirmed places in this group. Then choose Copy/Placement Requests from the toolbar. You will be prompted to pick the destination placement group from a list.



7.5 Placement Request Information

*	Placement Requests EMERALD PRIMARY	- (a X
Site Submissions Searc	h 1352J010		
Refresh Save	Preferences Rankings Supervisors Placements Checks Notes Documents Show		
(1352J010) Certi Primary 18/05/2015 to 12/	/IG/2015		
Status	onfirmed • Shift Normal • Starts 18/05/2015 Ends 12/06/2015 C	heck da	tes
Number requested 2	Number confirmed Preference quota No value		
Site comments			1
School comments	Ţ		<u> </u>
Payment N	io value Currency		¥.
Other — Activity Name			

Placement requests appear on a site window under a red-tinged tab (see above). The key information on the details form is the number of requested/confirmed places and the status of the request.

These numbers reflect the number of students this site can take for placement in this placement group. If a site says that it can take 2 students at a time in both morning shift and afternoon shift, then the number confirmed should be 4.

Generally when you create a request on a site it will be "unconfirmed" - this means that the site has not yet agreed to take the students.

When the site has agreed, the status should be changed from unconfirmed to confirmed. This confirmation process can happen via the Sonia web site by a site contact, or you must open the placement request and change the status to confirmed yourself.

The other tabs (preferences, rankings, supervisors and placements et cetera) give you access to the details of the confirmed places in this request. Please refer to the reference guide.



8 Adding Students to a Placement Group

				(1051G1_M	ED) - 2nd \	Year Nursi	ng Sei	mester 1 Medic	al				
Plac	ement	Groups Sun	nmary Search											
New *	Oper	Copy Save	Delete Details Students	Requests Sett	tings Check	s Notes D	0 Occuments & Links	Log	Automatic M	Aanual Follow Up Email Exp	ort			
	8	(10S1G1_M 10S1G1 Medical 23/08/2010 Requested:	HED) - 2nd Year Nursing) to 3/09/2010 28, Confirmed: 22, Studer	Semester 1 M nts: 34, Prefere	ledical nces: 0, All	ocated: 0								
	• F	ilter							Student Id	Name	Mode	Allocated		-
	Year		2009 🔹					^	Clinical Pract	icum 1				
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	Unit		Clinical Practicum 1			•		•	3190566	Katrina Bishop	I			
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The Students button on the Placement Group toolbar will bring up the form for adding students to a placement group (see above). On the right of the form is a list of the students who are currently assigned to the placement group.

On the left of the form is the student selector (see below). This list students filtered by their enrolment details, excluding students who are already in a placement group. For details on how to manage this process, please see the Sonia Zen document - "Advanced Student Selection".

🔿 F	ilter								
Year		2009				•			
Unit		Clinical Practicum 1				•			
Seme	ster	S2				•			
		✓ Ignore Students in	current Block	Code					
•	Add Criteria 🔻								
Select of 187 students									
	Student Id	Name	Course	Mode					
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	3166345	Sofia Argyropoulou	BP032	Ι	⇒				
	3237082	Julie Au	BP032	I	>				
	3213479	Elissa Baptist	BP032	I	⇒				
	3191405	Karl Bonto	BP032	I	>				
	3203614	Lisa-Maree Bruni	BP032	I	€				
	3229030	Lauren Burdett	BP032	I	€				
	3229051	Emma Burge	BP035	I	⇒	_			
[mass]				· ·					

The text box labelled "Select _____ of 187 students" can be used to randomly pick some number of students for adding to the group. Just enter a number in the box and press the Enter key on the keyboard. That number of students will be randomly selected. Click the green arrow button next to one of these selected students and all of them will be moved to the right hand side list.

You must save the placement group to commit the students to the placement group.



9 Allocating Students

9.1 Manual allocation

€⁄			Allocate Students	(AdvCFC1	4) Adv	Clir	nica	al Families	and	d Ch	nildren P	lacement								-) 5
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	Student Id	Name	Allocated		Pref.		•	_			Allocated	ł		Shift	Suitable for p	lacement	Pos.	Pref.	Distano		-	_
	V		T	V				0					T			7	7					
	1206822	Aruldoss, Elisabelle	Patterson P	ark Charter School						~	(123) Man	v Washingto	on Ele	ementary Sc	hool							
	1211567	Ballantyne, Sarah					=	<u>.</u>			(Unalloca	ated)					0		7 km			
	1195166 Barrett, John			L VETERANS HOME					(324) Patterson Park Charter School													
	1205108	Chan, Wing				-	-				Aruldoss,	, Elisabelle					0		11 km	8		
	1146407 Chontank Denise			CHARITIES -						^	(441316) (CAMDEN GE	ENER	AL HOSPITA	L							
	1209760	Deacon Randa	RESIDENTI	AL.							(Unalloca	ated)					0		1067 km	n		
	1210670	Doggydog, Frank							 (450002) PROVIDENCE MEMORIAL HOSPITAL 													
	1176294	Drew, Nancy									(Unalloca	ated)					0		2809 kn	n		
	1212067	Duffield, Sheila								^	(450005) 1	MEMORIAL	HERM	MANN BAPT	IST ORANGE HO	OSPITAL						
	1178263	Fay, Andrea									(Unalloca	ated)					0		1870 km	۱		
	1211628	Fowler, Bob						 (45000) 				(450007) PETERSON REGIONAL MEDICAL CENTER										
	1192662	Francisco, Tommy									(Unalloca	ated)					0		2288 kn	n		
	1188280 Freytag, Bernadette									^	(450010) (UNITED REG	ion/	AL HEALTH	CARE SYSTEM							
	1209575	Grace, Leah									(Unalloca	ated)					0		2031 kn	۱		
	1211907	Hallett, Suzanne								^	(450011) 9	ST JOSEPH F	REGIC	DNAL HEALT	H CENTER							
	1212849	Hargreaves, Andrew									(Unalloca	ated)					0		2025 km	۱		
	1210294	Harris, Brandy					-			^	(450015) F	PARKLAND	HEAL	TH AND HO	SPITAL SYSTEM						Ŧ	

This option on the Placement Group toolbar allows you to allocate students one at a time to the site you choose. To use manual allocation, select a student from the left hand list and an unallocated place from the right hand list and click the Allocate (+) button next to the student grid or site grid. If the allocation breaks your business rules, you will be notified, but you can still override this.

Once an allocation has occurred, the name of the site appear next to the student and the student's name appears under the site's list of places. Use the delete button ("-") from either list to undo an allocation.

9.2 Automatic allocation

Automatic allocation will assign students to sites based on your current Sonia business rule settings. Students who you have manually allocated will not be effected.

After an automatic allocation you can still go into manual allocation mode and change the sites students are going to one at a time.

9.3 Finalising allocations

Before sites and students can see who is allocated where, the checkbox "Allocations finalised" needs to be set on the Placement Group form (see 5.2).



10 Running Reports and Completing a Placement

Sonia includes a number of standard reports to help you communicate with your students and sites. For example you can use the Site Placement Request report to generate letters to each of the sites you added placement requests to.

File Edit View Favorites Tools	Help	
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😬 🔻 ∜ Sonia 🏈 User 🚺 How	📖 🙈 Court 🎉 Glene 🎉 Sonia 🎉 Sonia 🎉 S 🗙 🎽 👻 📓 🔻 🖻 👻 Page 🕶	Safety 🔻 Tools 🕶 🔞 🕶 🎽
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Student Attendance Record		
Student Completion Record		
Student Placement History		
Student Transcript		
Sites		
Available Placements Summary		
Site Placement Cancellation		
Site Placement Confirmation		
Site Placement Details		
Site Placement Notification		
Site Placement Rejection		
Site Placement Request		
Site Placement Statistics		
Sites List		
Supervisors		
Other 👻		
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When the students have returned from placement, all of their grades are in and you ready to leave that placement group behind, open the placement group and click the "Placement Complete" checkbox. This means the placement group will no longer appear in lists of active placement groups, but all of its data is still available if required.