Sonia Zen

Getting Started with Sonia

setting the standard for student placement software

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Document History

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Table of Contents

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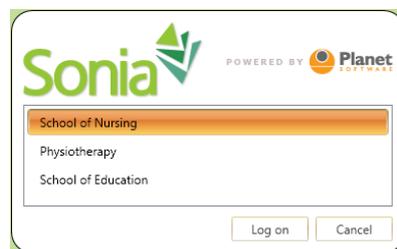
Sonia uses your credentials and selection to ensure you only work with data you are entitled to see. Staff in the faculty of Education would only see "School of Education" in this list.

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.

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

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

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 (+Uni level)	Sonia client user	A placement officer may be given access to adjust some 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 *Student*	Students can see information about placements they are involved in. They cannot see other student's data
Supervisor	Sonia web portal *Supervisor*	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 Coordinator	Sonia web portal *Supervisor*	(Preliminary information, to be confirmed in 2015) This role associates a Supervisor with a Subject. All students enrolled in that subject will be visible to the subject coordinator.
Site Contact	Sonia web portal *Site*	Any person associated with a site. Usually an employee of the site. Picked by the site, not by the university.
Primary Contact	Sonia web portal *Site*	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 Contacts	Sonia web portal *Site*	(Preliminary information, to be confirmed in 2015) Multiple secondary contacts. Have access to see all students at the site.
Student Contact	Sonia web portal *Site*	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 *Site*	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.

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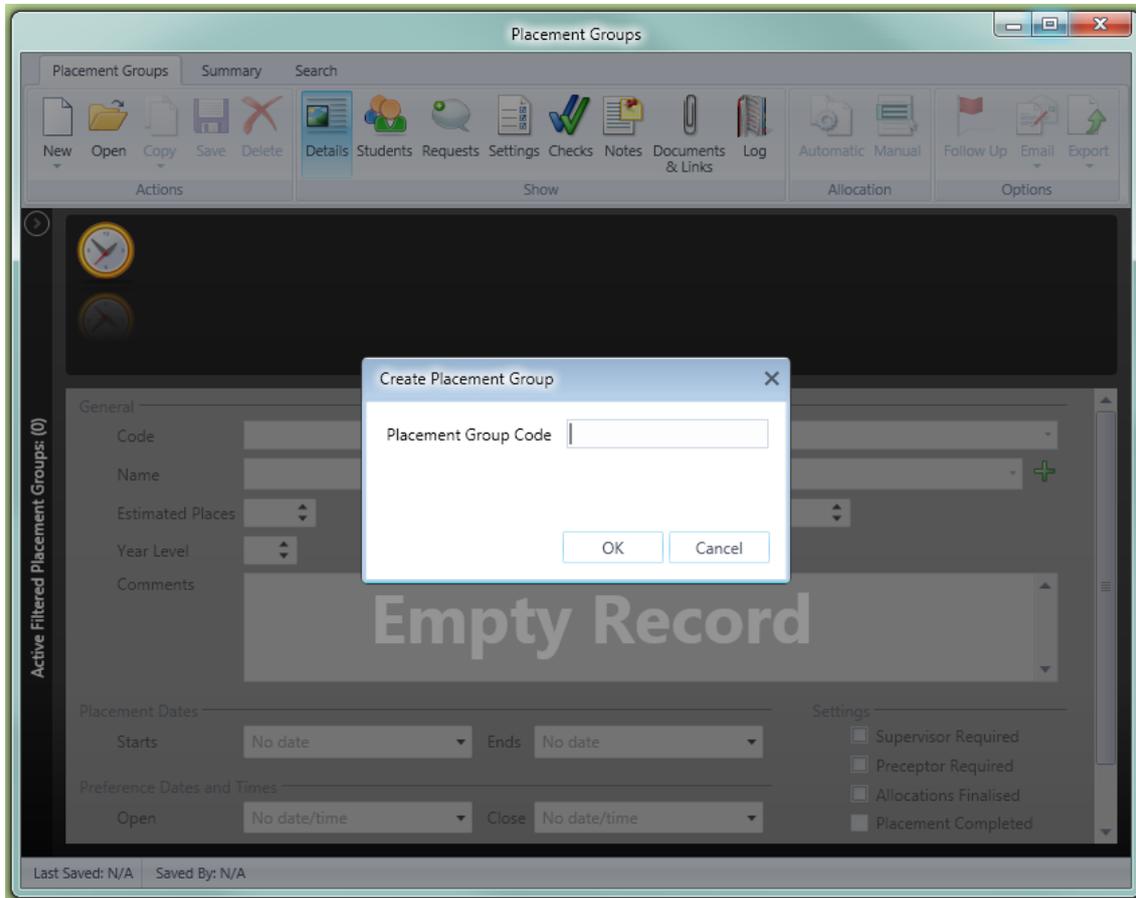
Note: if you need to create a series of placement groups, each the same apart from a different area, try using the New button's "Create a block of placement groups" option.

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.

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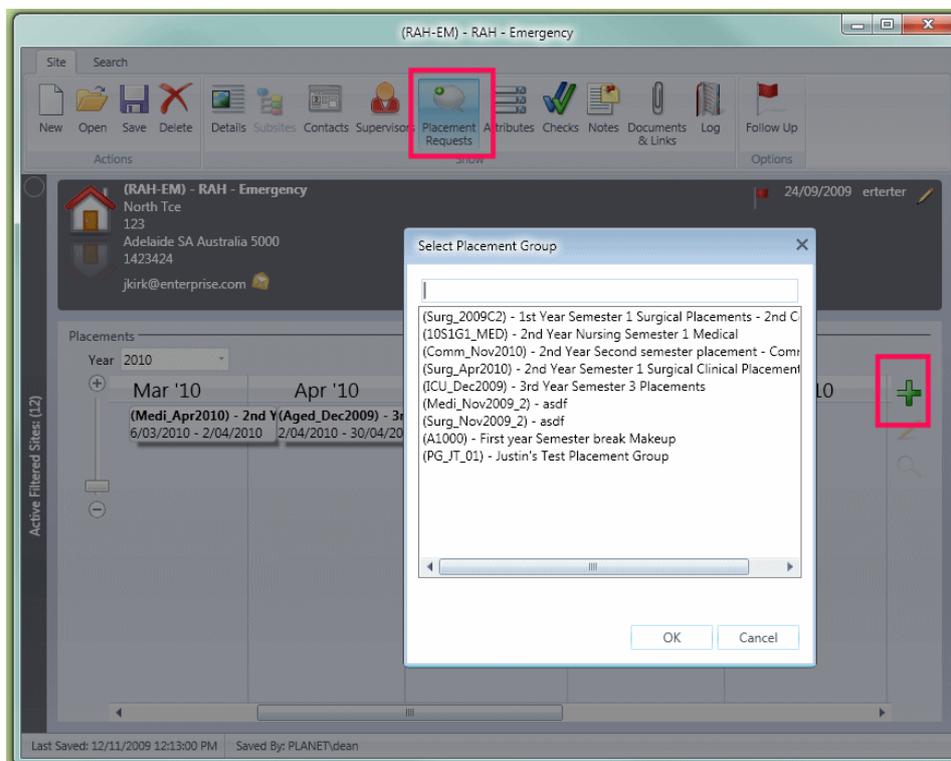
The image shows an open site window after the Placement Requests button on the toolbar has been clicked, and the "add" button has been clicked. It brings up a list of available placement groups to select from.

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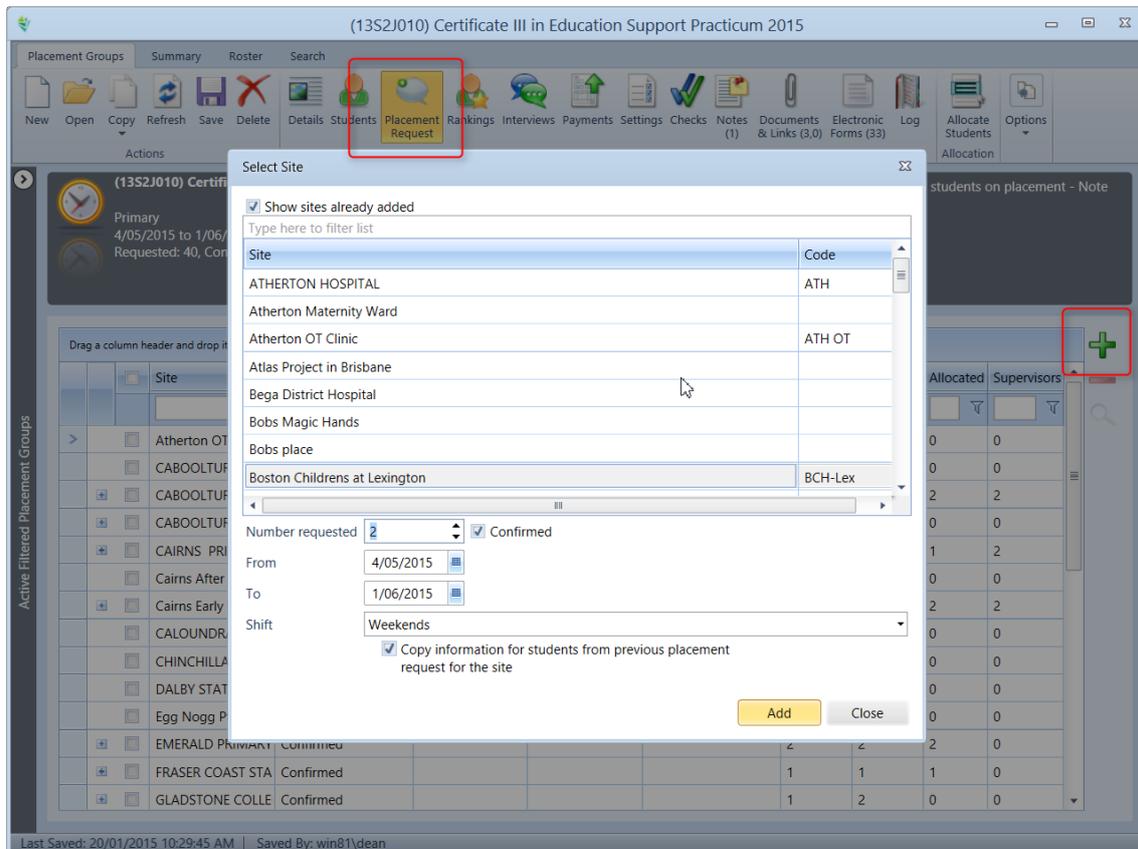
The image highlights the requests button on a placement group form. Clicking the "add" button to the right of the form will bring up the "Select Site" window where you can choose an individual site (and number of places) to be added.

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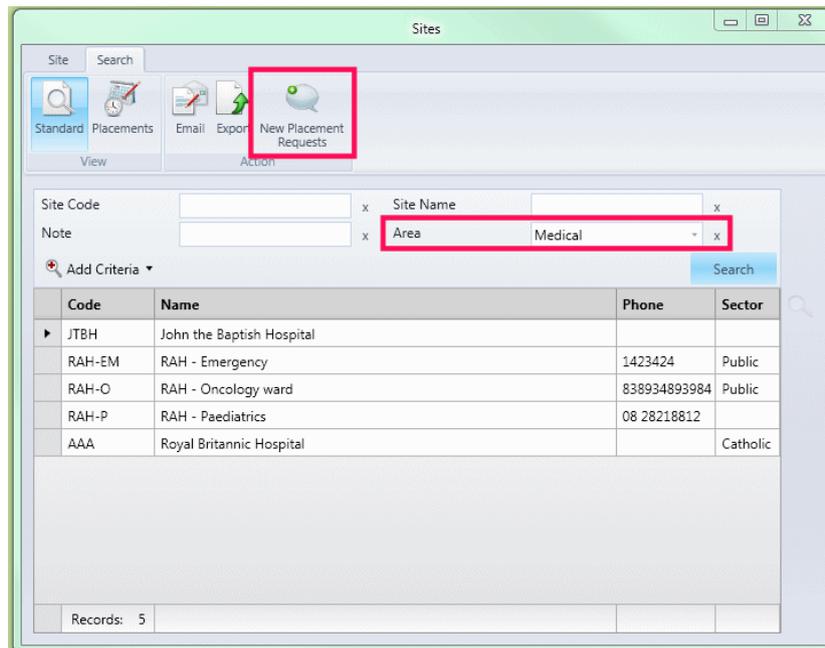
The image shows the Site Search tab, a search for sites with an Area of "Medical" has resulted in 5 hits. The "New Placement Requests" button will prompt the user for the placement group and then placement requests will be generated for each of the 5 sites.

7.4   Copying from another placement group
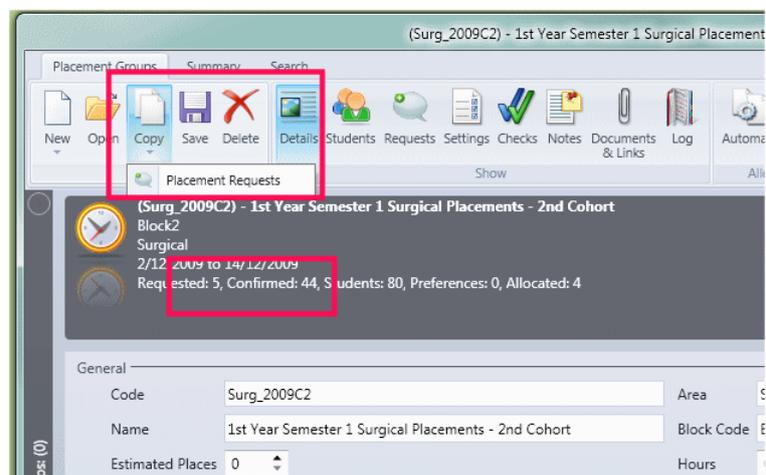
The image shows a very useful option in Sonia. It allows you to copy the placement requests from an existing placement group to a different placement group. To do this, open the group that has the existing placement requests - in the example above, there are 44 confirmed places in this group. Then choose 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 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
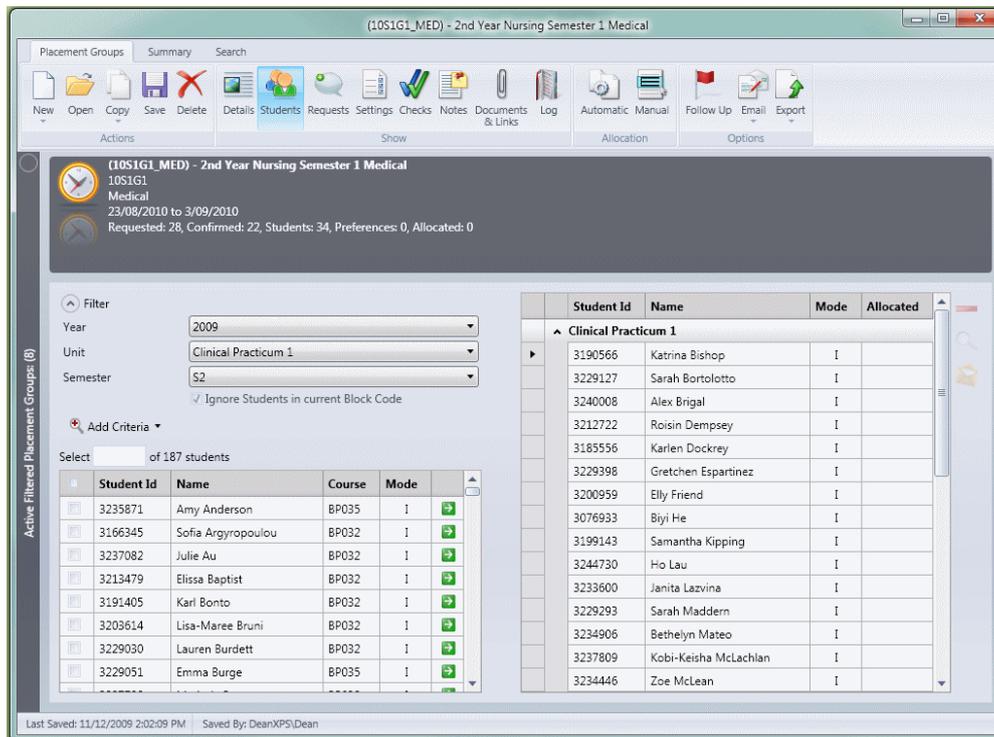
The Students button on the Placement Group toolbar will bring up the form for adding students to a placement group (see above). On the right of the form is a list of the students who are currently assigned to the placement group.

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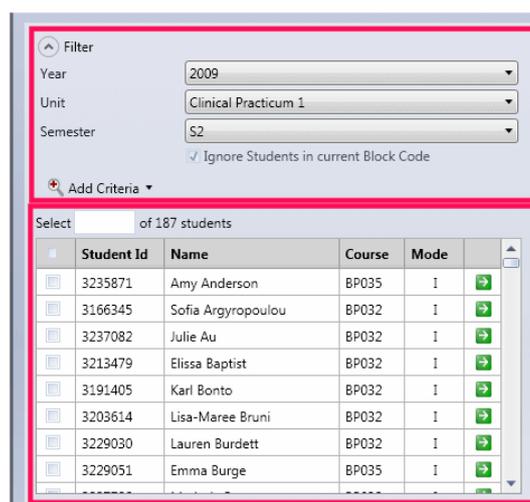
The text box labelled "Select ____ of 187 students" can be used to randomly pick some number of students for adding to the group. Just enter a number in the box and press the Enter key on the keyboard. That number of students will be randomly selected. Click the green arrow button next to one of these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

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.
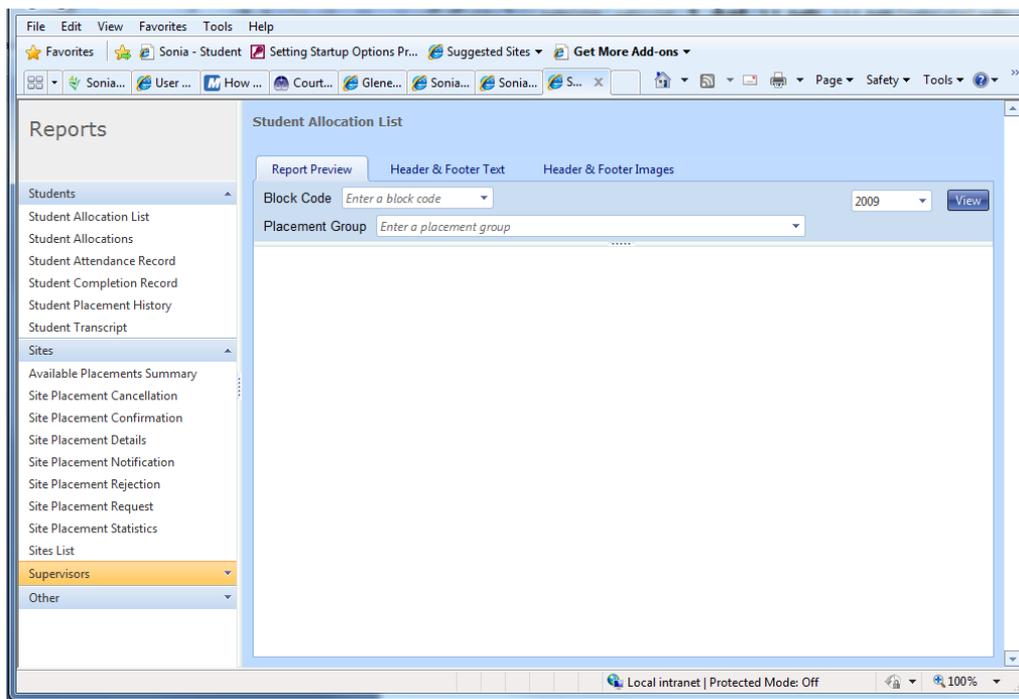
When the students have returned from placement, all of their grades are in and you ready to leave that placement group behind, open the placement group and click the "Placement Complete" checkbox. This means the placement group will no longer appear in lists of active placement groups, but all of its data is still available if required.