Sonia Zen

Mastering Site Submissions
March 2018

setting the standard for student placement software

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Document History

Version	Date	Author
1.0	November 2011	Dean Rosenhain
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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.

This document introduces site submissions. It is assumed that the reader is familiar with using Sonia – this document is for placement officers who would like to allow students or organisations to add new sites to Sonia via Sonia Online. If you are unfamiliar with the terms in this document, please refer to the Sonia Reference Manual and/or organise an online training session with Planet Software's Sonia support team.

2   What is Site Submission?

The Sites database within Sonia contains all of the details about the organisations you send your students to for placement. For many Sonia users, the same sites are use many times per year for a number of years. You develop and foster a relationship with your sites, and Sonia can help you manage that relationship.

For some Sonia placement officers, sites are a little more dynamic. For example in some courses students are responsible for researching and contacting sites themselves. Some universities would like to encourage a broad workplace experience program involving organisations around the nation (or overseas).

Sonia's Site Submission feature allows students and external organisations to nominate sites for consideration as placement providers.
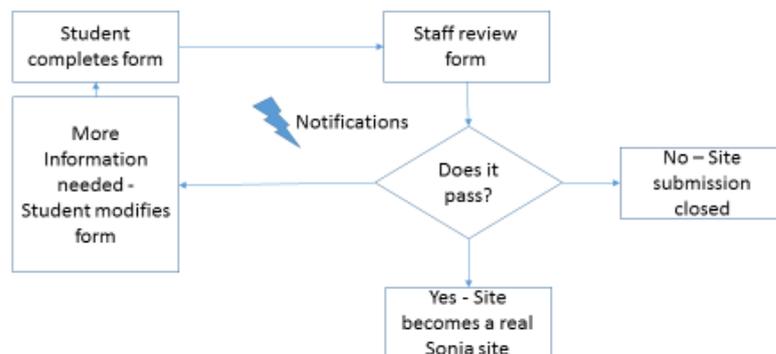
Site Submission workflow overview. Email notifications are triggered on submission and workflow milestones.

3   Setting the Scene

For the purposes of this document, we are going to use two example situations.

Situation #1: A student has to find and nominate an organisation that they wish to attend for an extended internship next year. The placement staff in the school/faculty the student is enrolled in are responsible for ensuring the organisation meets the university's criteria for partner organisations.

Situation #2: Your University is interested in building an extensive network of partnerships with external organisations with the goal of making these available to all students as potential work integrated learning situations. The university has duty of care requirements that must be met before a candidate organisation is accepted.

Our goal in this exercise is to walk through both situations showing how students, external organisations and university staff interact with Sonia during the process. The final part of the document will consider administration of the options and settings that control the process.

4 Situation #1 – Student Submissions
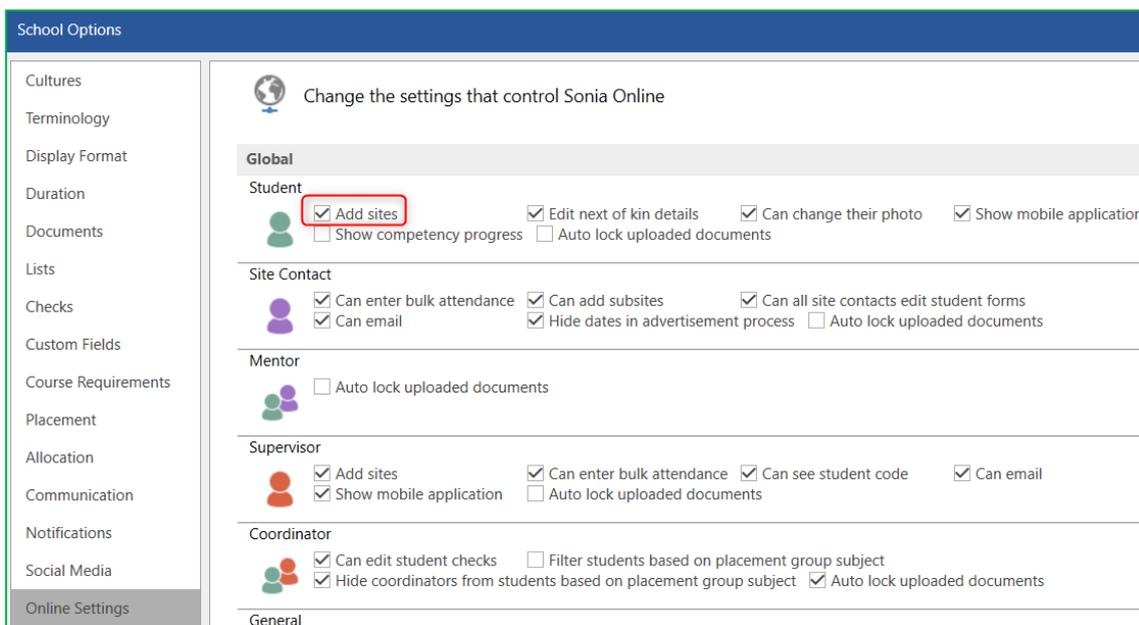
4.1 This is for your school only

The feature to allow students to add sites to Sonia is configured on a school-by-school basis. The settings and changes you make will only impact the school you are in.

4.2 Goal of this exercise

This exercise will walk through using Sonia to collect and verify new sites nominated by your students.
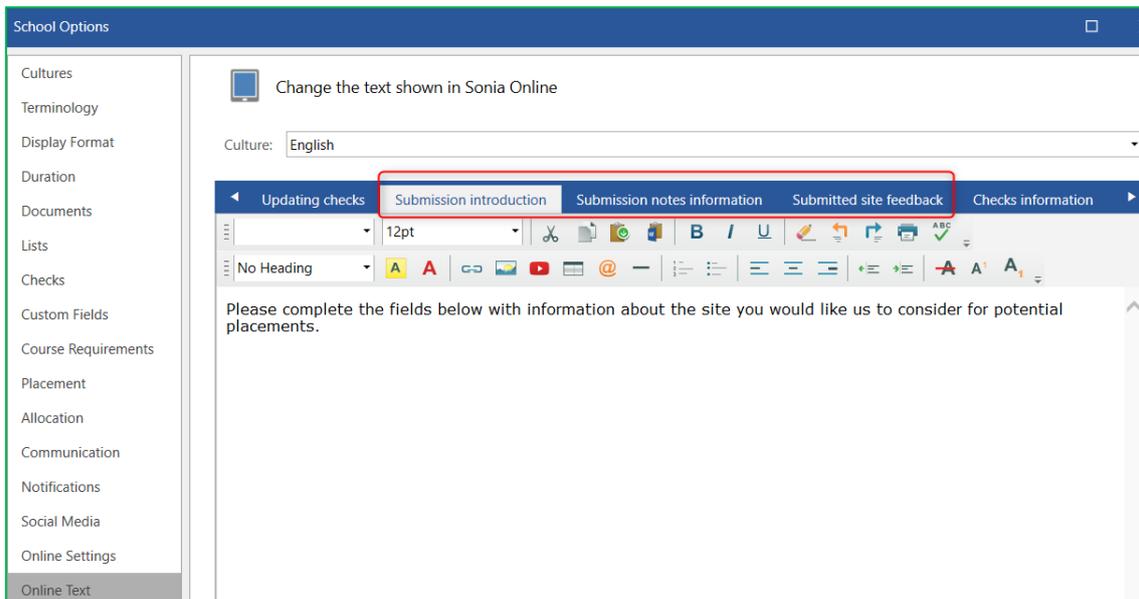
4.3 Preparation

Before we can test the student submission feature, we need to ensure that Sonia has been configured to meet your business process expectations. To do this, open School Options > Online Settings, and tick the box indicated below:

Next, under School Options > Online Text, enter instructions for the Online user to know how to submit their sites.

The Submission introduction appears at the top of the Site Submission page for the students; the Notes information appears just before a paragraph area students fill in describing their discussions with the potential site. The feedback text is included in a notification email sent to the student and potential site.

Note that these fields are rich text; they can include formatting as required.

The final step is to configure the email address that will receive a notification every time a student submits a site. That is done under School Options > Online Settings:
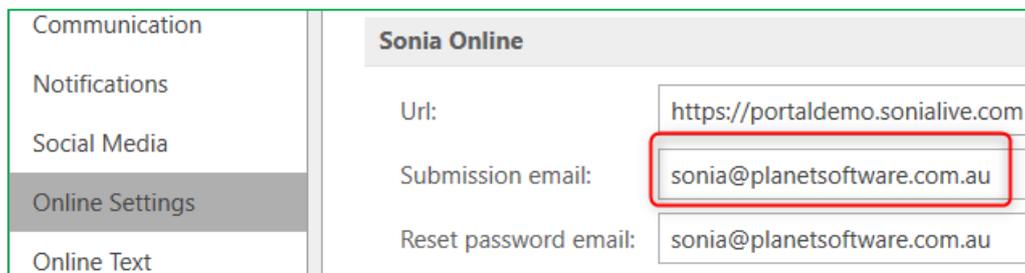
Enter your email address, and you are done!

Now your students can sign into Sonia Online, and they will see the Site Submission tab:
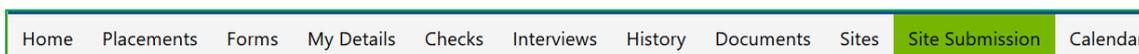
4.4   Students submit a site

On the Site Submission page (below), students can see a green button (1) to submit a new site, as well as tabs to see Draft, Pending and Closed submissions they have already made.
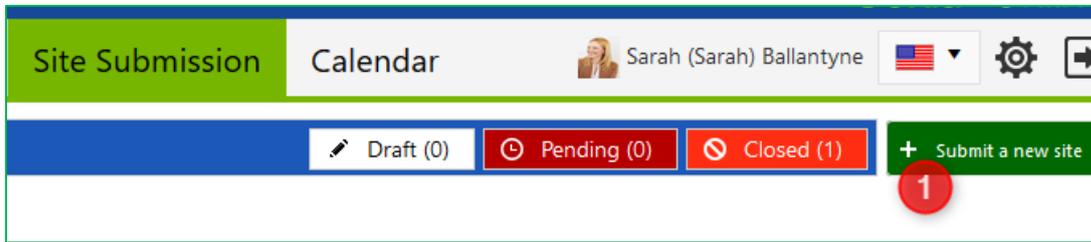
Clicking the "Submit a new site" button brings up a simple form for the student to fill in:
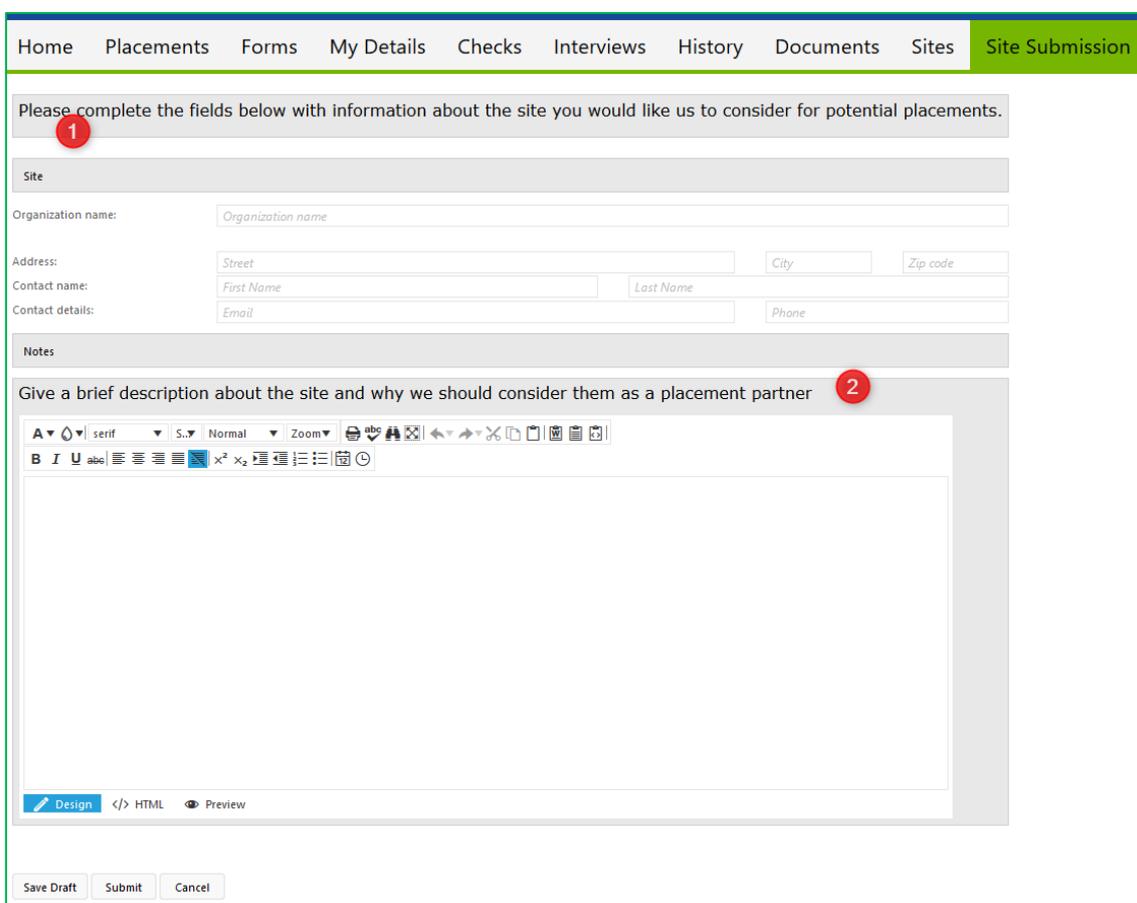
The submission introduction areas (1) and (2) will contain the informational text you have entered in School Options.

You may see "terms and conditions" at the bottom of your page. This text is set in **University Options**. Note that not all Sonia users will have access to change university level settings.

University options – showing setting for terms and conditions and url to university web site.

The student fills in the form and clicks Submit. They can choose to Save Draft or Cancel if they need to reconsider the site or get more information before completing.
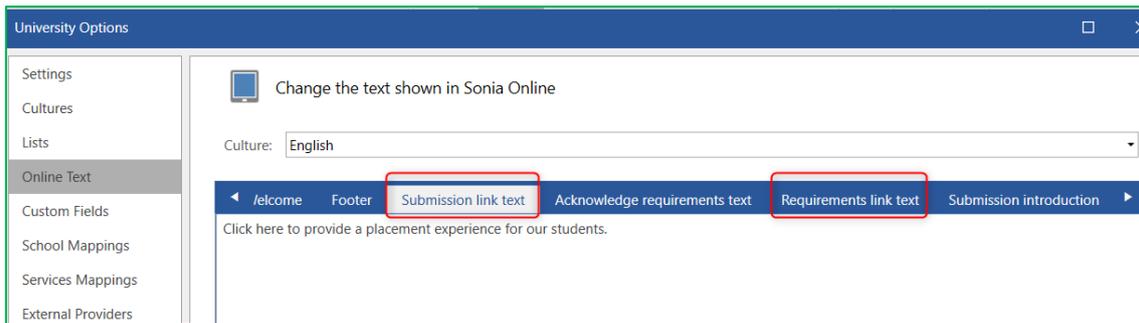
At this point, any placement officer who has subscribed to receive Site Submission notifications will receive an email alerting them to the fact that a student has made a new submission.

The next task is to manage the approval process.

4.5   Managing Site Submissions

Not everyone can manage site submissions. This permission is granted in School Options > Placement Officers > [select individual] > edit pencil > Permissions tab > tick 'can manage site submissions'.

Those with this permission will see an extra tab (Submissions) on Site windows.
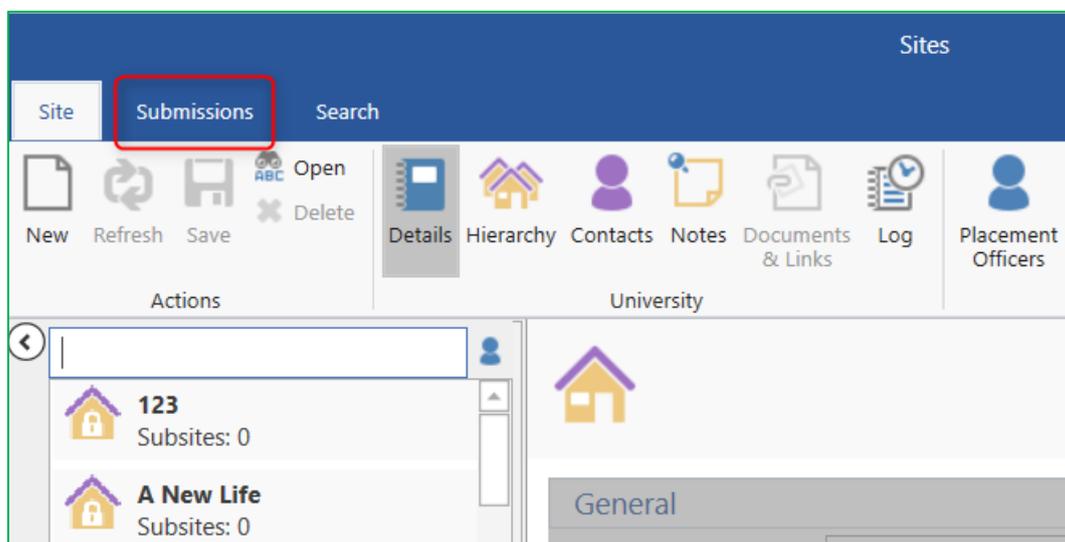
Site window showing "Submission" tab

Clicking the Submission tab will open the window where you can see and manage all site submissions. By default this view will open filtered to just show you submissions that are pending approval. This filter can be changed (2) to show just approved sites, draft submissions etc.
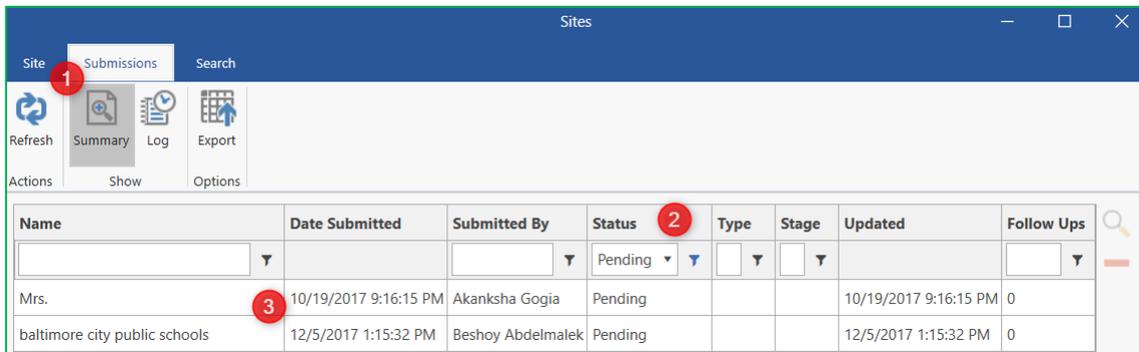
(3) shows an example pending submission. We can see who submitted, when it was submitted and when it was last updated. Type and Stage are user-defined categories to help track the progress of approval.

Submission overview table

Examples of Type and Stage usage

Type – used to categorize the nature of the application.	Internship, Employment opportunity, Discipline specific etc
Stage – what are your approval steps?	Initial review, Risk assessment, Signed agreement, Financial approval etc.

Select and open a pending submission to open the application and review its contents.

4.6 Reviewing and approving submissions
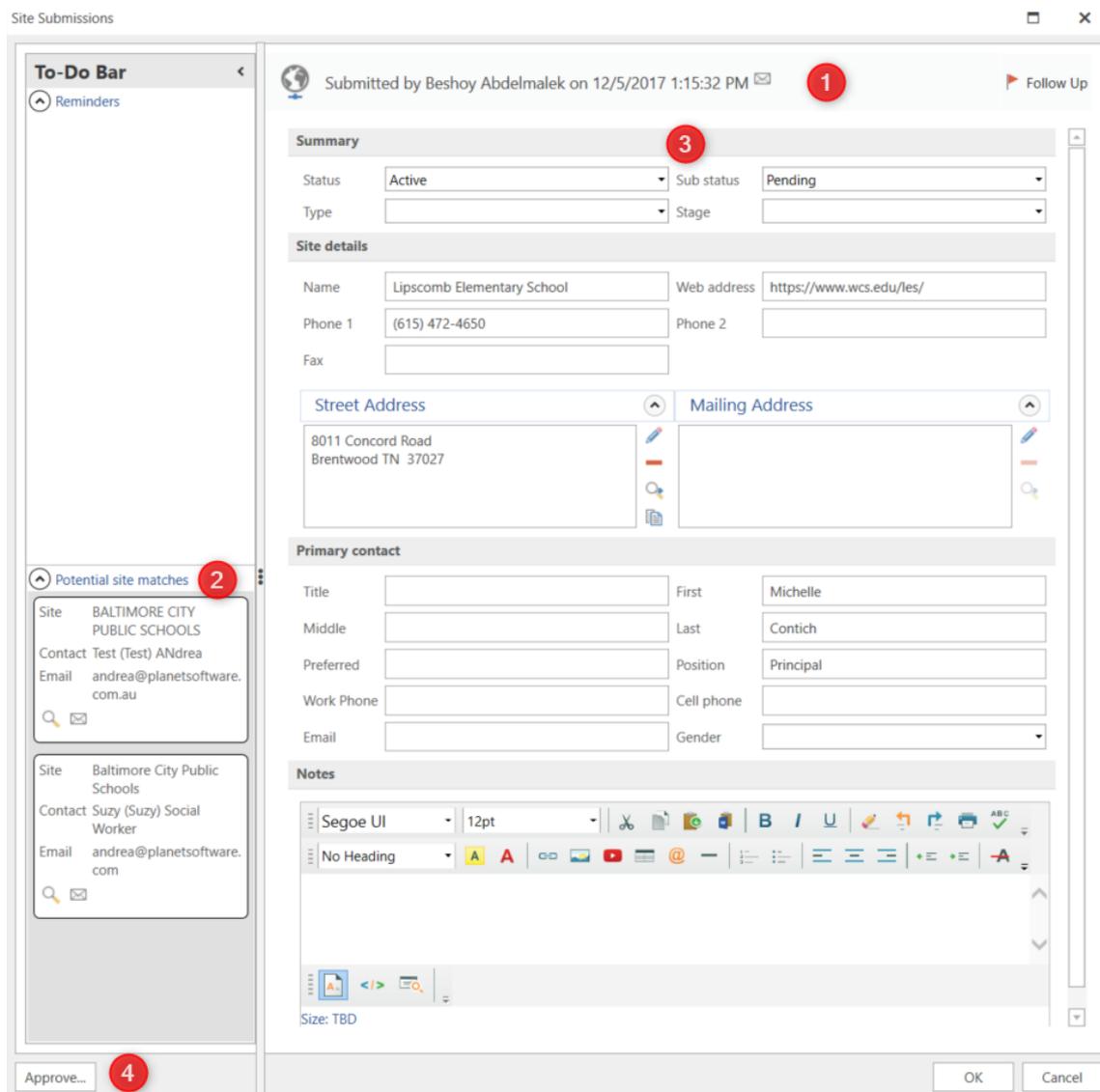
Opening a submission will show a form detailing the submission (above). The top of the form (1) has buttons to open the student record, send them an email, and raise a reminder for follow-up.

Near the top of the form is the summary area (3) where you will find the pick lists for Status and Sub-status, Type and Stage. We have indicated that Type and Stage are up to you to use as you wish. Status and Sub-Status are built into the process and cannot be modified. Status has the values "Active, Rejected or Cancelled". SubStatus can be one of "Pending, Needs More Info and More Info Provided".

If you set the Sub Status to "Needs More Info" and click the OK button (4), the student will be sent an email asking them to revisit the submission and complete more details. Once the student has resubmitted the form, the sub-status will change to "More Info Provided".

Keep an eye on the panel at the left of the form (2) – it shows other sites in Sonia that may be the same organisation as the one being submitted. Sonia checks things like names, addresses, telephone numbers and email addresses to see if this is a duplicate site.

Once you are satisfied with the submission, click the Approve button (4). A wizard will launch to guide you through the final steps for adding the approved site to Sonia.

5 Situation #2 – Anonymous Site Submission

Sonia supports anonymous submission of potential new sites. When this is configured, a link appears on the home screen and school home pages for Sonia Online.
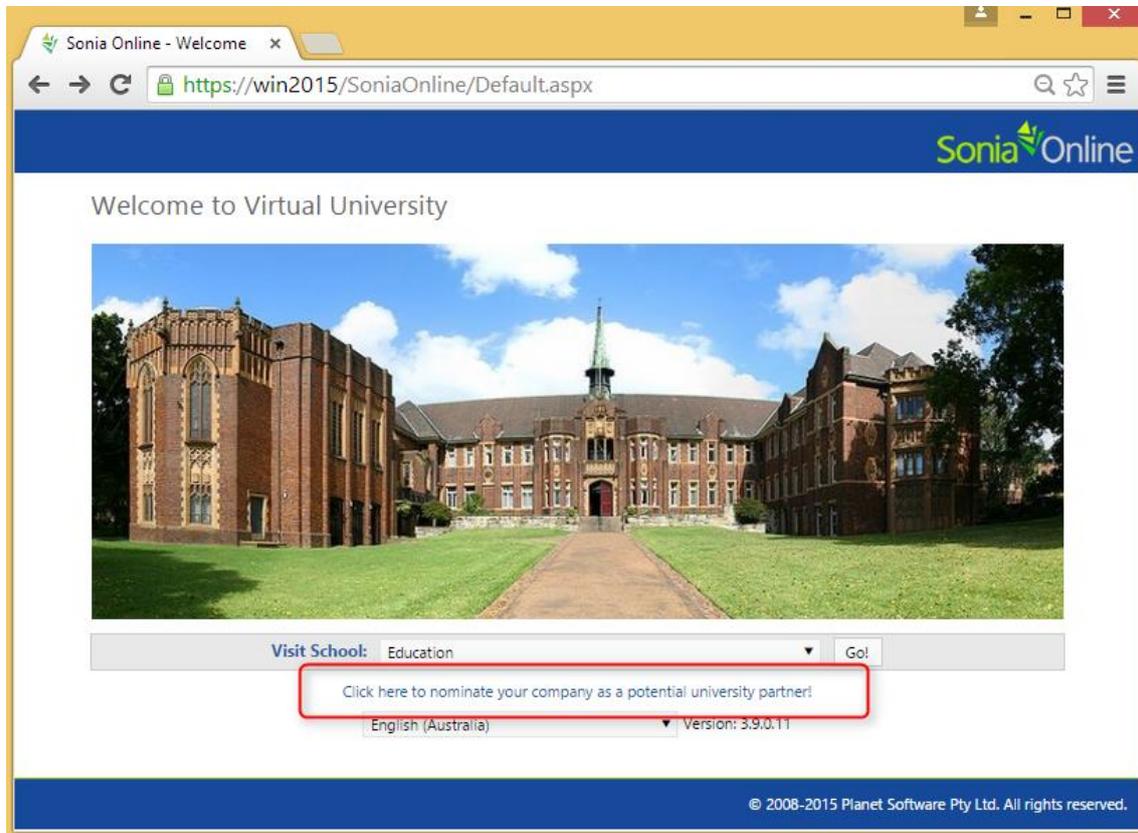
You can use the URL this link points to from your own web pages if you want to integrate the submission process with other parts of the university web site.

This feature can be turned on in University Options (only available to some users):
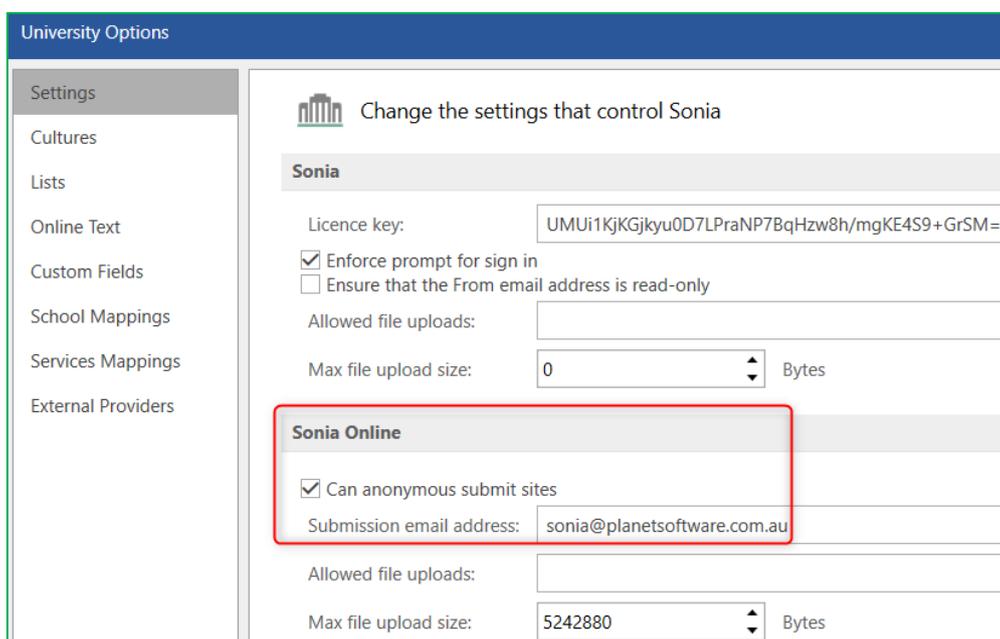
The text that appear for the prompt, as well as the submission instructions are all set using the Online Text settings.

6 Questions?

6.1 Can sites nominate themselves?

Yes.

This is done anonymously (e.g. without logging into Sonia). The prompt appears on the home screen of Sonia Online.

This is configured for the whole of the university (not individual schools).

6.2 Can students nominate multiple sites?

Yes, a student can enter as many site submissions as they wish.

6.3 Can I have anonymous submission turned on at the same time as authenticated submissions?

Yes.

6.4 Is it possible for students to not only add a site, but add their placement too?

Yes, there is a setting on a Placement Group that allows students to add all the details of a site plus their placement at that site. This has implications on data quality and should be used with care!