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InPlace User Guide for Faculty of Arts, Education and Social Sciences Staff

InPlace is used by the Faculty of Arts, Education and Social Sciences to manage clinical placements

Accessing InPlace

How do I access InPlace?

You can access InPlace in the following way:

- From anywhere in the world by typing the following URL directly into your browser:
  http://inplace.jcu.edu.au

NOTE: Mozilla Firefox is the preferred browser when accessing InPlace

How do I login to InPlace?

Select ‘Agencies’:

Login to InPlace

Enter your Username and Password and select Log in button:

Go to the details tab and change your password when you log in for the first time. It requires at least 1 capital, 1 number and 1 letter character.

What will I use InPlace for?

You will use InPlace to view your current, future and historical placement records. Preferences and Agency information will also be managed in InPlace.

How can I get help?

- Online help is available by clicking the help icon from any page
- By contacting your Placement Coordinator
Main Menu

Home - Clicking on this link will take you to the Home screen.

My Details - This will take you to the screen which displays general information in regards to the logged in user.

Help - This displays some general information relating to the function of the screen that you are currently on.

Alert Notifications – Displays relevant notifications.

Home

Widgets - The main feature is the issue boxes (also referred to as widgets) shown in the main section of the screen that highlight any items that may require action, or potentially of interest.

Widgets are here for your convenience allowing you to stay on top of any ongoing applications and providing quick links.

My Details

The Staff Detail Page displays several tabs of information.
Details - A personal information page, containing introductory level details such as contact details, limited course information, User Account information and Registration and Qualification Information.

Discipline - Here you can view a staff member’s level of access, that is, which disciplines at which campus.

Unit Offering - This defines which units the staff member is responsible for managing.

Ruleset - View a summary of rules the user has created.

Notes/Docs - Add private or public notes to assist in tracking work flow as well as add documents that assist the user in managing their workflow.

Process - The ability to attach a template from the query tool to create reports and various hardcopy outputs.

Help
Selecting the Help icon from any screen will provide Help information on the current screen.
Selecting the InPlace Documentation link will display a search field:

![Search Field](image)

Enter your query and select the search icon to display results:

![Search Results](image)

Alert Notifications
Selecting the Alert Notifications Icon will display any alerts that apply to you.

![Alert Notifications](image)
Placement Requests

Creating Placement Requests

STEP 1 Navigate to Request  Request Manager.

STEP 2 Select Academic Year Beginning from drop down list.

STEP 3 Select Discipline from drop down list.

STEP 4 Select Unit Offering/Group from drop down list.

STEP 5 Select Refresh button.

NOTE: The graph above gives a visual representation of the total placements required for the unit offering, how many placements are allocated and how many placements still require allocation. The Unit Details section provides an overview of the unit description and the placement requirements. Select the Detail, Placement and Process links for more information regarding the Unit and Unit Offering.

STEP 6 Select the New Request radio button.
**STEP 7** Select from all of the available agencies by selecting the first required agency name in the list then hold the shift key to select additional required agencies. Alternately, use the wildcard search and select one agency at a time.

![Available Agencies List](image)

**STEP 8** Double click the select button.

*Note:* You can only select **40 agencies** at one time; an error message will appear if you have selected more than 40 agencies.

**STEP 9** The selected agencies will then appear in the selected agencies list.

![Selected Agencies](image)

**STEP 10** Select a placement block from the available options in the drop down menu.

![Placement Blocks](image)

*NOTE:* Selecting a predefined option will populate the start and end dates. If you select other you will need to enter the start and end dates.

**STEP 11** For more information about what to enter in the Days, No and Times fields hold your mouse over the fields.
STEP 12  Enter or modify how many days are required on the placement.

STEP 13  Enter the number of placements required.

NOTE: If you leave the number as 0 this indicates that you are requesting as many placements as the agency can provide.

STEP 14  To nominate specific placement times, select the clock icon.

STEP 15  In the pop-up window select from any of the options and select ok.

NOTE: For alternate week times select the Add week button and select from the options available.

STEP 16  Click the OK button. Alternatively, select the cancel button to cancel the allocation of specific placement times.

STEP 17  Enter a Group Code if needed.

STEP 18  Enter a description of the activity to take place on the placement in the Activity text box.

STEP 19  Enter any applicable comments to the placement requirements in the Comments box.

STEP 20  If the placement must take place during a specific period tick the Fixed Dates check box.

STEP 21  If the placement must take place for a specific period of time tick the Fixed Duration check box.

STEP 22  If any custom fields have been associated with the discipline or the curriculum they will be visible at the bottom of the page.

STEP 23  Select desired values and click the OK button.

STEP 24  Once all necessary information has been entered select the Save button to create your requests.
Send Request to Agency

STEP 1  Select the Requests radio button.

STEP 2  Tick the box on the left of the previously created request.

STEP 3  Select Communication type – Email, Fax or Print by selecting the appropriate box.

STEP 4  Select Action Request and Ok

STEP 5  Agency Communication Template will pop up.

STEP 6  Amend details to include more Student information.

STEP 7  Select Preview Message to view final communication.

STEP 8  Select Send.
**Action Response (Generate Placement)**

**STEP 1** Select **Response** radio button

**STEP 2** Enter the number of placements in the Offers column.

**STEP 3** Enter/Change the times for the placement.

**STEP 4** Select **Generate Offers**.

**NOTE:** You can generate more placements for the same agency/placement block by repeating steps 1-3.

**NOTE:** For **MD4-TSV-Public-2013** you must add the specialism (by selecting the hat icon) prior to generating the placements. This will allow you to run rules on matching the student’s specialism to the placement.
Using Filters in Request Manager

Filter for requests that have requests but do not have a placement

**STEP 1** Select the **Requests** radio button.

**STEP 2** Click on the **Filters** link (this will open up a drop down list).

**STEP 3** Click the **No** radio button next to **Has Placement**.

**STEP 4** Click **Apply Filter**.
Filter out all requests that have been rejected

STEP 1  Select the Request radio button.

STEP 2  Click on the Filter link (this will open up a drop down list).

STEP 3  Check the Rejected box next to Request Status.

STEP 4  Click on Apply Filter.
**Remove start and end date**

**STEP 1**  Select the **Request** radio button.

**STEP 2**  Click on the **Filter** link (this will open up a drop down list).

**STEP 3**  Uncheck the **Start / End Date** checkbox next to **Display**.

**STEP 4**  Click on **Apply Filter**.
Student Placement

Allocate Student Placement

STEP 1  Navigate to Placement → Placement Manager.

STEP 2  Select Academic Year Beginning from drop down list.

STEP 3  Select Discipline from drop down list.

STEP 4  Select Unit Offering/Group from drop down list.

STEP 5  Select Refresh button.

STEP 6  Select Offer ➔ Student radio button.

NOTE - For Year 4, 5, and 6 – Select Filter Student button. Select the required group from the drop down list. Select Filter.

STEP 7  Select Rule Set if required i.e. Preferred Region if you would like to allocate based on preferred region.

NOTE: You will receive a dialogue box when the Rule Set has been applied.

STEP 8  Select the Run Trial Match button to identify the most suited student.

STEP 9  To allocate a student select Allocate.
Setting up Placements in Placement → Placement

STEP 1  Navigate to Placement → Placement.

STEP 2  Select Add a new item.

**Placement List**

- Agency: [field]
- No. of Placements per Agency: [field]
- Unit Offering: [field]

**Add Details**

- * Agency: [field]
- * No. of Placements per Agency: [field]

STEP 3  Enter number of Placements per Agency.

STEP 4  Click Select Agencies... button.

STEP 5  Enter Name of Agency and select Filter Button.

**Filter**

- Agency Name: [field]
- Agency Type: [field]
- Agency Level: [field]

STEP 6  Select blue Select link.

**Select**

- Agency Name: [field]
- Agency Type: [field]
- Agency Level: [field]

STEP 7  Click Add Agencies.

**Agencies to be added**

- Please select agencies from the list below.

STEP 8  Select Unit Offering from drop down list.
STEP 9  Change Offered Placement Duration hours if required – this will default to total requirement.

STEP 10  Enter or select Placement Block/Dates start and end dates.

STEP 11  Select Placement Times if you wish to add a Schedule

STEP 12  Select your student from the drop down box

STEP 13  Add comments if applicable

STEP 14  Generate

You can now proceed to:

- Add a Supervisor (page 19)
- Add a Schedule (page 20)
- Confirm the placement (page 21)
Action Supervisor

STEP 1 Navigate to Placement ➔ Placement Manager.

STEP 2 Select Academic Year Beginning from drop down list.

STEP 3 Select Discipline from drop down list.

STEP 4 Select Unit Offering/Group from drop down list.

STEP 5 Select Refresh button.

STEP 6 Select Supervisor radio button.

STEP 7 Filter placements by selecting/unselecting criteria e.g. Placement Blocks, Agencies, Students.

STEP 8 Apply the filter by selecting the Apply Filter link in the Action pane.

STEP 9 Select Select All in the Placement pane.

STEP 10 Click on student name to select.

STEP 11 Select Add in the Supervisor pane.

STEP 12 Search by Agency, Supervisor and/or Personnel Type.
STEP 13 Select the Select link next to supervisor.

NOTE: If your supervisor or agency contact is not listed please follow the instructions on page 36 to add.
### Action Schedule

**STEP 1** Navigate to Placement → Placement Manager.

**STEP 2** Select Academic Year Beginning from drop down list.

**STEP 3** Select Discipline from drop down list.

**STEP 4** Select Unit Offering/Group from drop down list.

**STEP 5** Select Refresh button.

**STEP 6** Select Schedules radio button

**STEP 7** Filter placements by selecting/unselecting criteria e.g. Placement Periods, Agencies etc.

**STEP 8** Apply the filter by selecting the Apply Filter link in the Action pane.

**STEP 9** Select Select All in the Selection pane.

**STEP 10** Click on fields under dates to adjust schedule

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**STEP 11** Edit start and end times in pop up box.

**STEP 12** Select OK.
Confirm Placement

STEP 1  Navigate to Placement → Placement Manager.

STEP 2  Select Academic Year Beginning from drop down list.

STEP 3  Select Discipline from drop down list.

STEP 4  Select Unit Offering/Group from drop down list.

STEP 5  Select Refresh button.

STEP 6  Select the Confirmation radio button.

STEP 19  Tick the box next to the student / students you wish to confirm.

STEP 20  Select Publish from the Notify list.

An icon will display next to the placement to confirm the placement has been published - 📚

NOTE: You can also Unpublish a placement.

Other options available in the Placement Confirmation Screen
You can display placement information by selecting and unselecting items in the following lists:

- Blocks
- Agencies
- Groups
You can filter by selecting a filtering option in the Pre-Defined Filters list.

The Legend explains icons that may appear next to a student:

**Notify Student – Used to email Students**

**STEP 7** Select Students from the Notify list.

**STEP 8** Email pop up will be displayed.

**STEP 9** Check message content and select Preview Message button.

**STEP 10** Preview pop up will be displayed.

**STEP 11** Select Close.

**STEP 12** Select Send.
Notify Agency – used to email agencies

STEP 13 Select Agencies from the Notify list.

STEP 14 Email pop up will be displayed.

STEP 15 Check message content and select Preview Message button.

STEP 16 Preview pop up will be displayed.

STEP 17 Select Close.

STEP 18 Select Send.

A list of recipients is available by opening the Selected Recipients tab.
Edit Email before Sending

STEP 1 Navigate to Placement → Placement Manager.
STEP 2 Select the Confirmation radio button.

When Notifying a Student

STEP 3 Select Students from the Notify list.
STEP 4 Email pop up will be displayed.
STEP 5 Check message content.
STEP 6 Change if required.
STEP 7 Select Preview Message button.
STEP 8 Preview pop up will be displayed.
STEP 9 Select Close.
STEP 10 Select Send.

When Notifying an Agency

STEP 11 Select Agencies from the Notify list.
STEP 12 Email pop up will be displayed.
STEP 13 Check message content.
STEP 14 Change if required.
STEP 15 Select Preview Message button.
STEP 16 Preview pop up will be displayed.
STEP 17 Select Close.
STEP 18 Select Send.

More than one Agency Personnel

STEP 19 Select Agencies from the Notify list.
STEP 20 Email pop up will be displayed.
STEP 21 Check message content.
STEP 22 Change if required – add a page to separate each email.
STEP 23 Select Preview Message button.
STEP 24 Preview pop up will be displayed.
STEP 25 Select Close.
STEP 26 Select Send.
**Using Filters in Placement Manager**

**STEP 1** Navigate to Placement → Placement Manager.

**STEP 2** Select the Supervisors radio button.

---

**Filter by Agencies**

**STEP 1** Click the Unselect All link in the Agencies box.

**STEP 2** Scroll through the list and select desired agency by clicking the box next to the name.

**STEP 3** To apply the filter/s, select Apply Filter in the Action box on the top right of the list.

---

**Filter by Placements**

**STEP 1** Click the Unselect All link in the Placements box.

**STEP 2** Scroll through the list and select desired student by clicking the check box next to the name.

**STEP 3** To apply the filter/s, select Apply Filter in the Action box.
Delete a Single Placement

STEP 1  Navigate to Placement → Placement

STEP 2  Enter Agency and Unit Offering to find the placement to be deleted.

STEP 3  Select Filter.

STEP 4  Select the detail link to open placement record.

STEP 5  Scroll to the bottom of the screen and select delete:

Other functions in this screen:

- Change Unit Offering
- Change Placement Block Dates
- Add Rostered Days
- Add a Supervisor
- Add an Incompatibility
Delete a multiple placement

**STEP 1** Navigate to Placement ➔ Placement

**STEP 2** Select Clear Clipboard.

**STEP 3** Use filters to locate your list of placements you wish to delete.

**STEP 4** Add the individual placements to the Clipboard or select *Add All* if you have narrowed down your list using filter.

**STEP 5** Select the Bulk Actions tab.

**STEP 6** Select Delete Placements in Select Task drop down box.

**STEP 7** Select the Placements that require deletion, then select delete.

**NOTE:** Placements must have a status of either “Offer” or “Planned” and must not be associated to a student in order to be deleted via Bulk Actions. If you do need to delete placement with a student attached, first unconfirm them through placement Manager ➔ Confirmation.
Creating Self-Selectable Placement

STEP 15  Navigate to Placement → Placement.

STEP 16  Select Add a new item.

STEP 17  Enter number of Placements per Agency.

STEP 18  Click Select Agencies...button.

STEP 19  Enter Name of Agency and select Filter Button.

STEP 20  Select blue Select link.

STEP 21  Click Add Agencies.
STEP 22  Select Unit Offering from drop down list.

STEP 23  Change Offered Placement Duration hours if required – this will default to total requirement.

STEP 24  Enter or select Placement Block/Dates start and end dates.

STEP 25  Select Self Selection from Allocation Type drop down list.

STEP 26  Enter Allocation Open Date and time – this is the date you wish the students to start selecting offers

STEP 27  Enter Allocation Expiry Date and time – the date you wish the choices to no longer be available to students.

STEP 28  Enter Experiences if required by selecting the Edit Button to the right

STEP 29  Select from available list.

STEP 30  Select Generate.
Enabling unit offering for self-placement.

**STEP 1** Navigate to Curriculum → Unit offering

**STEP 2** Search for Unit offering by code then press filter.

**STEP 3** Select the Detail link next to the unit offering.

**STEP 4** Click Yes to allow self-placement.

**STEP 5** Scroll to the bottom of page and select Save.
Student Self Placement

NOTE: The Unit Offering must be enabled to allow self-placement applications. All students enrolled in that unit offering will be able to submit an application.

Assess Self-Placements

STEP 1  When a self-placement application is submitted it will appear as a widget on the home page.

STEP 2  Select link to application to review the submission.

STEP 3  Send feedback to student for Pending/Not Approved/Incomplete Applications.

STEP 4  Process application by selecting the Self Placement Wizard button.

NOTE: The user will need to have Agency Add and Edit permissions to be able to review the agency details of the application using the wizard. If the button appears greyed out, the user must have the unit offering added to their staff profile.
Step one of the self-placement wizard will give you option to try match the Agency details to an Agency that already exists within InPlace, or add the agency as a brand new agency.

The table above displays possible agency matches. You can select the agency by clicking on the Select radio button. Then click the Next button.

Alternatively, if the agency list doesn’t have a match, you can click .

You can then edit the agency details to try and better match the agency against your existing list of agencies.

**Note:** Editing the agency details only effects how the search and how InPlace is trying to match the agency. The agency details are not saved.

If there are no matches within your list of agencies, then you can add the agency as a new agency, Fill in the appropriate fields then click the save button. This will bring you to step two of the wizard.

**Note:** You must have an agency type and an agency level.
In step two of the wizard, we add personnel to the agency and assign supervisor/s to the placement. You must have at least one supervisor for the placement and at least one of the personnel needs to receive correspondence.

You can edit the agency contact details by clicking on the **Match Agency Contact** link to try and better match the agency contact against your existing list of personnel.

**Note:** Editing the personnel details only effects how InPlace is trying to match the agency contact against the personnel list. The agency contacts are not saved.

If there are no matches within your list of personnel, then you can add new personnel to the agency. Fill in the appropriate fields as they appear. At this point in time you can also:

1. Add the personnel as a supervisor to the placement.
2. Give the personnel the ability to view and receive correspondence regarding placement.
3. Create a login for InPlace with specific role permission. This login information will be sent to them via email.
Scroll to the bottom of the page to assign supervisors. Similar to matching an agency contact, you can edit the supervisor details by clicking on Match Supervisor link to try and better match the supervisor against your existing list of supervisors.

**Note:** Editing the supervisor detail only effects how InPlace is trying to match the supervisor details against your existing list of supervisors. The supervisor’s details are not saved.

If there are no matches within your list of personnel, then you can add new personnel to the Agency by clicking on Add to Personnel link. Fill in the appropriate fields as they appear. At this point in time you can also:

1. Add the personnel as a supervisor to the placement.
2. Give the personnel the ability to view and receive correspondence regarding placement.
3. Create a login for InPlace with specific role permission. This login information will be sent to them via email.
In step three of the wizard it will let you view the self-placement extended attributes and lets you edit the placement and agency attributes. Click **Next** when complete.

**Self Placement Wizard**

**Step 3 - Additional Information**

**Submitted Attributes**

There are no extended attributes defined for this SelfPlacement

**Update Attribute Records**

- Placement Attributes
- Agency Attributes

- **SL3006 (Unit)**
  - Experiences on Placement:
    - Adult
    - Dysphaga
    - Paediatric
    - Voice

---

Step 4 in the self-placement wizard is step you review the all of the information that you have entered throughout the wizard; as well as approve and confirm the placement.

**Self Placement Wizard**

**Step 4 - Review & Approve**

- **Student**: Student Tester (123456)
- **Duration**: 200.00 Day(s)
- **Unit Offering**: SL3006 PWE - T2D - 24/02/2014 to 20/06/2014
- **Agency**: Testing

**Agency**

- Name: Goondiwindi North Queensland
- Details: 60110111, Mobile:
- Email: test.test@vce.com

**Contact**

- Name: Test Tester
- Details: 60110111, Mobile:
- Email: test.test@vce.com

**Supervisor**

- Name: Test Cothamagana
- Details: 60110111, Mobile:
- Email: test.test@vce.com

**Additional Information**

- Experiences on Placement:
  - Adult, Dysphaga, Paediatric, Voice

---

[Back] [Next] [Save & Exit] [Cancel]
Update Agency Personnel Details

**STEP 1** Navigate to Manage ➔ Agency.

**STEP 2** Select the Detail link next to agency. (Use the filters to locate one if required)

**STEP 3** Scroll down the record to Personnel section.

*Update Existing Personnel Record*

**STEP 4** Select the Personnel record to update by clicking Detail link next to their name.

**STEP 5** Update the record with new details.

**STEP 6** Select Save.

*Add New Personnel Record*

**STEP 7** Select blue triangle next to Add Personnel.

**STEP 8** Enter details.

**STEP 9** Select Save.
Agency Rejects Request and asks not to be contacted
Navigate to Request Manager ➔ Response.

Reject the request

STEP 1   Tick the box to select the Request record.

STEP 2   Select the Reject link in the Action box.

STEP 3   When prompted select Ok.
Set Up Unit Offering Requirements (for Placement)

STEP 1  Go to Curriculum → Unit Offering.

STEP 2  Type in the Unit Code (subject code) into the Unit Code field.

STEP 3  Click on Filter to search for your Unit Offering.

STEP 4  Select the Detail link on the unit you are responsible for.

STEP 5  On the Unit Offering page, you will be able to see if placement requirements have been set for the unit offering.

STEP 6  If the Required Placement Units have not been set, click on the link Set Unit Version Placement Requirements. You can then enter the Placement Requirements for the unit offering.

NOTE: There may be more than one unit version, as the requirements for a unit offering can change from year to year.

STEP 7  Enter the number of hours required to be completed for your unit offering, make sure that the unit of measure is set to Hour.

STEP 8  Save the record.
Set Up a Placement Block

**STEP 1**  Go to Request ➔ Placement Block.

**STEP 2**  Find and select your unit offering by clicking on the first icon beside the Unit Offering field.

**STEP 3**  Use Filter to locate Unit Offering.

**STEP 4**  Check the ‘Current Unit Offerings Only’ box to locate a current offering.

**STEP 5**  Click Select to choose.

**STEP 6**  Once you have selected your unit offering, select *Add a new item* and then add a Description, Start Date & End Date on the Placement Block screen.

**NOTE:** The description should be something meaningful to you—“Semester 1 – 1st Placement”.

You can create more than one placement block for a unit offering.
View Student details

STEP 1 Navigate to Manage ➔ Student.

STEP 2 Search for student by student code or name and then press Filter.

STEP 3 Select the Detail link next to a student name.

STEP 4 Select the Placement tab.
STEP 5  Select the **Enrolment** tab.

STEP 6  Select the **Notes/Docs** tab – notes could include why a placement wasn’t accepted or changes in address.

STEP 7  Add a note or document to the student record by selecting the **Add Note** or **Add Document** button.
Updating Student Details

STEP 1  Navigate to Manage ➔ Student.

STEP 2  You can locate your student in a number of ways:
- search by student code
- surname
- discipline
- unit offering
- course

STEP 3  Select the Detail link next to required student.

STEP 4  Select the Details tab and update relevant fields.

NOTE: You will see a number of tabs under the heading selecting these tabs will help you to update relevant fields including address details, placement details and enrolment details.
Add PPR

STEP 1 Navigate to Manage > Student.

STEP 2 Search for student by using student code or name.

STEP 3 Go to the Student record by selecting the Detail link next to required student.

STEP 4 Scroll down to PPR details and then edit relevant fields by hovering your mouse over the right side of the screen to locate the Edit link.

STEP 5 A pop up will open for you to enter relevant details in this field.

STEP 6 Click OK to save.

NOTE: Pre placement requirements may differ depending on faculty/school or discipline.
Pre-enrolling Students into courses in advance

For instances where Students are being placed at the end of one year in preparation for the next they can be pre-enrolled by completing the steps below:

1. Filter by student groups
   a. Navigate to Manage → Student

   b. In the unit offering filter select the unit offering the students are in currently ie: SL3006

   ![Image of Select Unit Offering window]

   c. Click on filter

   d. The current students for the above offering should appear

   ![Image of Student List window]

   e. Click on Clear Clipboard

   f. Select ‘Add all’ icon to add students to the Clipboard

   g. Select the Bulk Actions tab

   h. Select task: Add Enrolment
i. Enter the Unit Offering name the students are going to ie: ‘ED4460 – 24/11/2014-13/02/2015’

j. Enter the Course Version name – you can check this in the student enrolment area or complete a subject search to confirm

k. Select all of the students (check the ‘Select/Deselect All’ check box)

l. Click the save button (students will be enrolled in the unit offering)
Setting up Agency Preferences

STEP 1  Set up Placement Block (page 38 of user guide).

STEP 2  Create Request.

STEP 3  Action Response.
Repeat for all available Placement Blocks.

STEP 4  Navigate to Curriculum > Unit Offering.

STEP 5  Filter in the Unit Code to search for subject.

STEP 6  Select Detail link.

STEP 7  Scroll down page and complete Minimum Number of Agency Preferences.

STEP 8  Complete Maximum Number of Agency Preferences.

STEP 9  Select Save.
STEP 10  Navigate to Placement → Agency Preferences.

STEP 11  Select the Detail link next to the required Unit Offering.

STEP 12  Tick Allow Ranked Preferences box.

STEP 13  Select Save.

STEP 14  Open Associated Agencies tab.

STEP 15  Select the agency/s that will be available.

STEP 16  Scroll down and select select Save.

Student will now have the ability to submit Agency Preferences in InPlace.
Manage Experiences

STEP 1 Navigate to Manage → Experience

STEP 2 Select Add New Item

STEP 3 Enter the code associated with experience

STEP 4 Enter the description of experience

STEP 5 Select Discipline from drop down list

STEP 6 Once complete select save.

You will be returned to the Experience List screen where your newly created experience will be visible.

Add an Experience to a Course

STEP 1 Navigate to Curriculum → Course.

STEP 2 Select Detail link on the required Course.

STEP 3 Select the Course Versions tab

STEP 4 Click on the Details link of the active Course version

STEP 5 Populate the required fields in this form. Note that the Discipline must be the same as the discipline of the created Experience.

STEP 6 Click on the Placement Requirements tab.

STEP 7 Click on the Add Placement Requirement.
STEP 8 Populate the Year level (first year, second year etc.) that the placement requirement is linked to. Select the Experience and populate duration (placement requirement units and unit of measure) add the faculty and cohort start year and campus.

STEP 9 Click Save. This will auto generate "dummy" unit offerings/placement requirements for the next three years (number is configurable from the back end. Navigate to Curriculum --> Unit Offering from the main menu.

STEP 10 Search for the experiences, you will notice that the unit offerings generated will have a unit code which begins with the <experience code - CR(Course Requirement reference number)

STEP 11 Now that you have created the experiences/dummy unit offerings, the next step would be to manually enrol students into these placement requirements. This can be done in bulk from the Manage --> Student --> Bulk Actions tab
Add an Alert

An alert notification is required when a certain event occurs whether it will be a change to an extended attribute value or an action occurs on an entity or involving an entity which is in a certain state.

**STEP 1** Navigate to Communication → Alerts.

**STEP 2** Click on Add a new item.

**STEP 3** Give the alert a uniquely identifiable name. This will allow you to find it again in the future.

**STEP 4** Set the alert status to Active if you require it to be running as soon as it is created.

**NOTE:** Uncheck this box and the alert will not trigger when appropriate conditions are met.

This is useful for alerts that relate to self-selectable placements that may only need to be activated at certain times of the year.

**STEP 5** Select the Trigger
STEP 6  Select Severity

![Severity: Urgent]

STEP 7  Select Criteria

![Criteria: Student, Blue Card Status = '13', Equals, Application not Received]

NOTE: Criteria are essentially conditions on the triggering event. There are many possible criteria which can be set for each trigger.

STEP 8  Enter Alert Text

![Alert text: Your Blue Card has expired - Please renew as soon as possible]

STEP 9  Select who should be notified

![Notify: Triggering User, Academic (Topic Coordinator), Administrator, Agency Coordinator, Agency Supervisor, Discipline Supervisor, Education Placement Coordinator, Facilitator (Internal Supervisor), HUA Reports, Placement Coordinator, Placement Manager, Receptionist/Admin, Self-Placement Coordinator, Staff, Student, Supervisor]

STEP 10  Select Save
Create a Rule/Ruleset

This allows you to create a set of rules to rank students in the allocation process to their most suitable placement. Rules and Rulesets can be created for such things as student preferences by location; prerequisites; student distance to placement opportunities etc.

**STEP 1** Navigate to Placement → Rule or Ruleset.

**STEP 2** Click Add new item

**STEP 3** Enter the Name of the rule you are creating

**STEP 4** Set either a Pre-Loaded Rule
   a. Student (Agency Preferences)
   b. Location – as the crow flies or via the shortest route
   c. Student (Date of Birth)
   d. Student (Gender)
   e. Travel time using public transport or
   f. Extended Attributes

**STEP 5** Set a Rule Operator
**STEP 6** Depending on the type of rule being created there are a number of Rule Operators which can be used to define the results of each rule:

a. **Equals.** Exactly the same options are selected and unselected in both lists
b. **No selections overlap between lists**
c. **Consumes.** All selections in second list, selected in first list
d. **Consumed by.** All selection in first list, selected in second list
e. **Not Blank**
f. **Like**
g. **Not Like**
h. **Partially equals.** Some, though not all options are selected and unselected in both lists
i. **Each item in both lists do not equal**
j. **All items selected**

**STEP 7** Select Save.
Placements without Clinical Training Settings

If the HWA Report shows any Clinical Training Settings that are “Not Identified”, Placement Coordinators should run the query Placements without Clinical Training Settings:

**STEP 1** Go to Reports → Query Tool.

**STEP 2** Locate the ‘Placements without Clinical Training Settings’ query.

**STEP 3** Select Run.

**STEP 4** Enter the placement start and end date range for the placements that you wish to review and the result will display all placements without Clinical Training Settings within that date range.

**STEP 5** You can filter this list by any of the columns by typing into the field below the column heading; you can also export these results to Excel by clicking the Export to Excel tab at the top of the page. If exporting to Excel, remember to save as file type .xls (not .csv), otherwise any changes you make will be lost.
Add Clinical Training Settings to Placements (in bulk)

Once placements without Clinical Training Settings have been identified, Placement Coordinators can add Clinical Training Settings to placements (in bulk), as follows:

**STEP 1** Navigate to Placement ➔ Placement.

**STEP 2** Filter your placements by Agency and Unit Offering to find the placements that require updating.

**STEP 3** Select the + icon next to the placement/s to add them to the clipboard (or add all on the bar above the list).

**STEP 4** Select the Bulk Action tab.

**STEP 5** Select Clinical Training Setting in the Select Task menu.

**STEP 6** Select a value.

**STEP 7** Select the placement records you wish to update by checking the box (or all boxes).

**STEP 8** Select Save (this will update all of the clinical training settings to that value).