# Field Experience Admin Guide

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Field Experience Overview

The Field Experience feature of via™ has been designed to facilitate completing assessments of students when participating in field internships. Field Experience is very similar to course based assessments in both building of assessments and completing rubrics. However, Field Experience allows assessors from outside your institution to participate in the internship, and to complete assessments of students. Also, Field Experience is used to align a student’s internship to a site, and provides a time log for students to record time spent in internship related tasks.

Field Experience Roles

The Field Experience feature uses three built-in and template roles: intern, supervisor, and mentor.

- intern: the student/user that will be assessed
- supervisor: the institution-based user that will participate in an internship and can complete assessments
- mentor: the non-institutional user that will participate in an internship and can complete assessments
NOTE: The names of these roles that users see within an internship can be changed. [See the Adding Members to a Field Experience Group section.]

Administrative Setup

The basic setup of Field Experience assessments is similar to typical course-based assessments.

1. Users are created, including mentors and supervisors
2. A group template is created
3. A group(s) is created
4. Users are added to a group as members
5. Activity templates are used to assign activities to members of a group

There are also additional steps required specifically for Field Experience internships.

1. Sites, site categories, labels, and time log categories are defined.
2. Individual student placements are aligned with a mentor, supervisor, site, label[s], and time log categories.
Building Field Experience Attributes

There are four unique attributes that can be created and used with Field Experience. These include labels, log categories, site, and site categories. These attributes are created by selecting the hierarchy node in with the Field Experience groups reside, and click the Field Experience tab.

![Image of the Field Experience interface]

**Labels**

Labels are created and then applied to each intern’s placement. Common labels include subject and grade, but there are no restrictions on a label’s content. Also, more than one label can be applied to each intern’s placement.

**To create a Field Experience Label:**

1. Select the hierarchy node in with the Field Experience groups reside.
2. Click the **Field Experience** tab.
3. Click **Label**.

![Image of the Field Experience interface with labels highlighted]
3. Click the **Create Label** button.

4. Type in the name of the label.
5. Click the **Create** button.

6. Repeat these steps for each label to be created.

*Site Categories*
Site categories are applied to sites. Common examples include “public school,” “private school,” “hospital,” etc., but there are no restrictions on a site category’s content.

To create a Field Experience Site Category:

1. Select the hierarchy node in which the Field Experience groups reside.
2. Click the Field Experience tab.
3. Click Site Category.
4. Click the Create Site Category button.
5. Type in the name of the site category.
6. Click the Create button.
7. Repeat these steps for each site category to be created.

_Sites_

Sites are the physical location at which each intern’s placement occurs, such as the name of a school, hospital, or clinic. However, there are no restrictions on a site’s content. Only one site can be matched with each intern’s placement.

**To create a Field Experience Site:**

1. Select the hierarchy node in with the Field Experience groups reside.
2. Click the **Field Experience** tab.
3. Click **Site**.

4. Click the **Create Site** button.
5. Type in the name of the site.
6. Select a site category.
7. Click the **Create** button.

8. Repeat these steps for each site to be created.

**Log Categories**

Log categories are used by interns when adding time to their time log. The categories allow an intern to document tasks and events, or group hours under a specific category, which can then be used by administrators in reporting.

**To create a Field Experience Log Category:**

1. Select the hierarchy node in with the Field Experience groups reside.
2. Click the **Field Experience** tab.
3. Click **Log Category**.
4. Click the **Create Log Category** button.

5. Type in the name of the log category.
6. Click the **Create** button.

Repeat these steps for each site to be created.

**Users - Creating mentors and supervisors**
Mentor and supervisor user accounts are created by using the *Import Users* function. The ability to import users is reserved for the top-level administrator account. When filling out the users import spreadsheet, supervisors are assigned the role of *faculty*. Mentors are assigned the role of *external*.

**NOTE:** Assigning mentors the role of external simplifies their interface by removing the *Rubrics* and *Templates* tab from their landing page.

**NOTE:** The role column on the users import spreadsheet can be thought of as account type. It is unrelated to template roles or group roles.

### Group Templates - Creating Field Experience Group Templates (internships)

When creating a group template to be used with Field Experience, the process is the same as creating any group template, with one important difference: it is **required** that Internship is selected as the category.

![Group Template Creation](image)

**Selecting Internship as the category is required.**

### Groups - Creating Field Experience Groups


When creating Groups that will be used for Field Experience, the process is the same as creating any group, with one additional option: Log Feature. Log Feature establishes whether an intern will have access to the Time Log feature, and if they will enter an amount of time and category, or simply a category.

Field Experience group owners

Group owners of Field Experience groups have the same abilities as group owners of regular courses. They can see and manage the status of submissions and assessments, complete rubrics, and edit activities.

Unique to Field Experience group owners is the ability to submit an activity to the system in lieu of the mentor or supervisor completing rubrics. This is especially useful when, for example, the supervisor completes their rubric, but the mentor does not. By default, the activity will be incomplete and remain visible until the mentor completes and submits their rubric. However, a group owner can complete the activity by submitting it to the system, the mentor’s rubric will remain incomplete, and the activity will no longer appear as open to the intern or supervisor.
Also, while creating intern placements by matching intern, mentor, and supervisor is often done by an administrator, Field Experience group owners can also create these placements.

**Membership - Adding Members to a Field Experience Group**

Group membership defines all the users that will be part of a group. For Field Experience groups, members include interns, supervisors, and mentors. There are two ways to define members of a group: by manual process or by the membership import.

NOTE: Before being added as a member of a group, users must already have been added to the system using the *Users import* [See the Creating mentors and supervisors section.]

Importing group members

*Group membership import file*

Importing users as group members requires the use of a spreadsheet file. There is a sample file available, which includes the required headers and provides examples of correctly entering the user information.

**To access the group membership import sample file:**

1. From within a Group Template, click the Create Group button.
2. From the Create Group popup window, click the Sample File button, which will expand the window.
3. Click the members.csv link to download the sample file.

NOTE: It is not necessary to create a group when downloading the sample file. Once the sample file is downloaded, the group creation can be cancelled.
The membership import spreadsheet requires three fields to be populated:

- **Name**: The first and last name of the user to be added to a group
- **User ID**: The user ID of the user to be added to a group. The user ID is the unique value that identifies a specific user, which means the user ID must be correct and match the user name for the import to succeed.
- **Role**: The name of the role under which each group member will participate. These names should reflect the naming used at your institution, and will be correlated to one of the built-in roles (intern, supervisor, mentor) during the matching process.
Once the membership import file has been created and populated, there are two ways to import the file into via™: during the creation of a group, and after the group has been created.

Importing group members during group creation

If the group membership import file is already prepared when creating a group, you can import the file during the group creation process.

**To import group members during the group creation process:**

4. From the Create Group popup window, fill in the Group Name, Owner, Term, Start Date, End Date, and Log Feature fields.
5. Click Enroll Members.
6. Your computer’s file browser window will appear.
7. Browse to your membership import file, and click Open.
8. Click Save on the Create Group popup window.
Importing group members after group creation

Once a group is created, its membership can no longer be imported using the Create Group window. Instead, the file can be imported on the group’s settings page.

To import group members from the group's settings page:

1. From the list of groups, locate the group into which members will be imported.
2. Click settings button (GEAR icon) under the Operations column.

3. On the group settings page, click the Members tab.
4. Click Enroll Members.

5. Your computer’s file browser window will appear.
6. Browse to your membership import file, and click Open.
7. After verifying your imported members are correct, click the Save button on the Enroll Members popup window.
Correlating imported roles to the built-in roles

When a group’s membership is imported, there is additional step required in order to correlate each of the member roles created in the import file with one of the built-in roles [intern, mentor, and supervisor].

**To correlate an imported role with a built-in role:**

1. On the group settings page, click the Members tab.
2. Locate the first role.
3. Click the 3 dots icon, and select Edit.
4. In the *Edit Role* popup window, select the correlating role from the dropdown menu.
5. Click the **Save** button.

6. Repeat these steps for each of the import created roles.

Once a role has been correlated to a built-in role, the built-in role will be shown as a colored indicator next to the role name.

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**Adding group members manually**
Members can be added to a group manually. But first, the member roles must be created.

**To create a member role manually:**

1. On the *group settings page*, click the **Members** tab.
2. Click the **Create Role** button.
3. On the *Create Role* popup window, type in a Role Name. This should be the name used at your institution.
4. From the dropdown menu, select a built to which your custom named role will correlate.
5. When finished, click the **Save** button.

**To add members to a role manually:**

1. On the *group settings page*, click the **Members** tab.
2. Locate the role to which members will be added.
3. Click the **3 dots** icon, and select **Add Member**.

4. From the **Add Member** popup window, select the user to be added as a member from the dropdown menu.
5. Click the **Save** button.

6. Repeat these steps for each member to be added.

**Activity Templates - Creating activity templates for use in Field Experience**
Creating an activity template for use in Field Experience is the same as creating an activity template for course use, with one important difference: When choosing a workflow for the activity template, the internship workflow must be selected.

**IMPORTANT:** The internship workflow MUST be selected in order to use the template in Field Experience.

**To select the internship workflow when creating an activity template for Field Experience:**

1. Be sure the select the appropriate hierarchy node in which to create the activity template.
2. Click the **Create Template** button.
3. On the *Create Template* popup window, type in a title for the activity template.
4. From the *Workflow* drop down menu, select **Internship Workflow**.
5. Click the **Next** button.

**Assigning ownership of an activity template component**

Just as with course-based activity templates, the components of a Field Experience template can be assigned to a specific template role. In addition to the **Group Owner** role, templates that have been created using the **Internship Workflow** allow the **Mentor** and **Supervisor** roles to be assigned to components as well.

**NOTE:** Just like course-based templates, components added to the Assessment Panel area of the template cannot be assigned to students/interns. To allow components (including rubrics) to be assigned to interns, the component must be placed in the content area of the template.

**To assign a role to a template component:**

1. Add a component to the activity template.
2. From the component options popup, select an owner from the drop down menu.

In the illustration below, a *rubric* component has been added to the content area of the template.
Adding Log Categories to Field Experience groups

After creating the master list of log categories, specific log categories are added to a Field Experience group to make them available to the group’s interns. This is useful when only some of the created log categories will be used by interns in a group.

NOTE: Adding log categories to a group is required for interns to be able to use them in log entries.

To add specific log categories to a Field Experience group:

1. From a Field Experience group list, click the Log Categories tab.
2. Click the Insert Log Category button.
3. From the *Add Log Category* popup window, click the checkbox next to each log category that will be available to interns. The selected categories will appear on the right side of the popup window.

4. When finished selecting categories, click the **Save** button.

**Matching - Creating intern placements**
Once roles, members, and sites (and optionally labels and log categories) have been created, the final step is to create the placement. Creating a placement matches an intern with a site, mentor, supervisor, and makes the placement active in group.

**To create a placement and match interns with mentors and supervisors:**

1. From the group settings page, click the members tab.
2. Click the Edit button [Pencil ICON] for the intern that will be matched.

   ![Student Candidate Table]

3. On the Edit popup window, select a mentor, supervisor, and site from the dropdown menus.
4. Select all applicable labels from the label dropdown menu. Multiple labels can be selected.
5. When finished, click the Save button.
Activities - Creating Activities for Field Experience

Creating activities for a Field Experience group is identical to creating activities for course-based groups. However, be sure to make the matches of intern, mentor, and supervisor before creating an activity to ensure each role has access to the activity.