

## Agency Maintenance

### Agency: Creating and Maintaining Agencies

“Agency” is the InPlace term for an Industry Partner or External Organisation. An Agency is attached to one or multiple disciplines, but is viewable by all disciplines (with the exception of Agency Personnel/contacts are only viewable by those within the specified discipline). This is to prevent the duplication of Agency records.

### Agency Creation: Agency Naming Conventions

In order to minimise Agency duplications we have created a set of guidelines when creating new Agencies.

- Where possible, the ABN should be included in the Agency record for Australian Agencies.
- Australian Company Names should be validated at ABN Lookup <http://abr.business.gov.au>
- Company Names should be written in full to provide clarity, common abbreviations can be added in brackets after the name:
  - Australian Taxation Office (ATO)
  - National Australia Bank (NAB)
- International companies should have a separate hierarchy for each country or locations where WIL activities take place:
  - World Vision: Australia
  - World Vision: Cambodia
- Offices or outlets of an organisation should include location details in the Agency name to uniquely identify the Agency:
  - Australia and New Zealand Banking Group Limited (ANZ): 55 Collins Street Melbourne
  - Australia and New Zealand Banking Group Limited (ANZ): Docklands Melbourne

### Agency Type

The Agency Type, under Details is a mandatory field when creating a new Agency and lists the Australian and New Zealand Standard Industrial Classification (ANZSIC) Level 1 Divisions, listed below:

- Accommodation and Food Services
- Administrative and Support Services
- Agriculture, Forestry and Fishing
- Arts and Recreation Services
- Construction
- Education and Training
- Electricity, Gas, Water and Waste Services
- Fast Moving Consumer Goods
- Financial and Insurance Services
- Health Care and Social Assistance
- Information Media and Telecommunications
- Manufacturing
- Mining
- Other Services
- Professional, Scientific and Technical Services
- Public Administration and Safety
- Rental, Hiring and Real Estate Services
- Retail Trade
- Transport, Postal and Warehousing
- Wholesale Trade

## Agency Hierarchies

The Agency Level is used to define a hierarchy between related Agencies. There are four levels available:

- **Level 1:** is optional and if it exists, it may be a non-physical entity such as an enterprise group or government. A WIL activity is unlikely to occur at this level.
- **Level 2:** is mandatory and will be the primary level in any hierarchy. It should represent a physical location of an office or where the WIL activity will occur.
- **Levels 3 and 4:** are optional, if required, to record different site addresses in large organisations where the WIL activity occurs.

The **Agency Level Template** defines the Agency levels used across different wider industries.

Template	Level 1	Level 2	Level 3	Level 4
Corporate / Organisation	Group	Office / Outlet	Department	Unit
Government	Government	Department	Office	Unit
Health	Network	Facility	Department	Unit
School	Peak Body	School	Campus	Unit
University		University	School / Faculty	Unit

Examples of Agencies and the corresponding Agency Level Templates are outlined below.

- Agency Level Template: Corporate/Organisation
  - **Group** - Australia and New Zealand Banking Group Limited (ANZ)
  - **Office/Outlet** - Australia and New Zealand Banking Group Limited (ANZ): 55 Collins Street Melbourne
  - **Office/Outlet** - Australia and New Zealand Banking Group Limited (ANZ): Docklands Melbourne
- Agency Level Template: Government
  - **Government** - Australia Government
  - **Department** - Australian Taxation Office (ATO)
  - **Department** - Australian Bureau of Statistics (ABS)
  - **Office** - Australian Bureau of Statistics (ABS): Belconnen
  - **Office** - Australian Bureau of Statistics (ABS): Melbourne
- Agency Level Template: Health
  - **Network** – Alfred Health
  - **Facility** – The Alfred Hospital
  - **Facility** – Caulfield Hospital
  - **Department** - Alfred Hospital Alfred Psychiatry (Acute)
  - **Unit** - Caulfield Hospital Baringa CGMC Mental Health

- Agency Level Template: School
  - **Peak Body** – Public Schools Victoria
  - **School** – Maribyrnong College
  - **School** – Elsternwick Primary School
  - **Campus** - Maribyrnong College: Sports Academy
  
- Agency Level Template: University
  - **University** – RMIT University
  - **School/Faculty** – RMIT University: School of Applied Communication
  - **School/Faculty** – RMIT University: School of Art
  - **Unit** – RMIT Gallery

## Search for an Agency

Agencies can be filtered by the following parameters:

- **Agency Name**
- **Agency Legal Name**
- **Agency Code**
- **Agency Type**
- **Agency Level**
- **Discipline**

It is recommended to use a **wild card character** with the “Agency Name” filter. Add “%” before and after the name to ensure that you find Agencies with similar names.

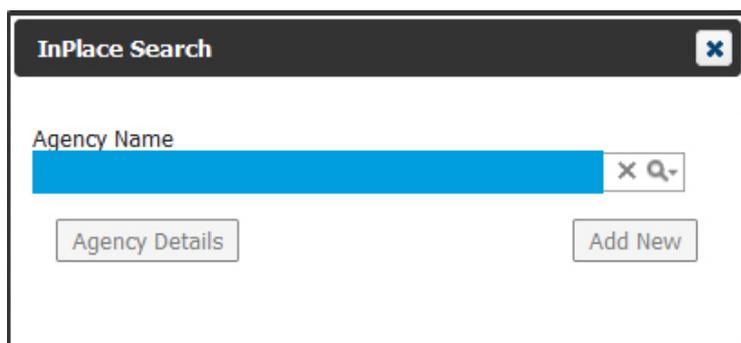
i.e. Entering “%Alfred%” into the “Agency Name” field will produce the following result:

- Alfred Health
- Alfred Health: Ian Potter Library
- Alfred Health Alfred Psychiatry (Acute)

## Adding a New Agency

WIL Champions (and WIL Practitioners with additional access) are able to create new Agencies. Before adding a new Agency, it is essential that you check whether or not the Agency already has a record on file by searching for it.

- Click on the **+ Add a new item** button.
- Type the name of the new Agency into the pop-up window.
- If there is an existing Agency already in the system, it will be displayed beneath the new name and does not need to be added.
- If not, click on the **+ Add New** button.



The screenshot shows a search interface titled "InPlace Search". It features a search input field labeled "Agency Name" with a blue background and a search icon. Below the input field are two buttons: "Agency Details" and "Add New".

Navigate to **Manage > Agency**

1. Complete the **Agency Name** field.
2. Click on the **Filter** button.

**Agency List**

**Filter**

Agency Name:  Agency Legal Name:  Agency Code:  Agency Type:  Agency Level:  Discipline:

Active Agencies only:  Categories:    Match All  Match Any Specialisms:     Show Agencies partially satisfying Specialism

Groups:    Integration Partner:   Show only Agencies not mapped to selected Partner

View	Agency Code	Agency Name	Agency Legal Name	Partner Agency Name	Partner	Email	Agency Type
Detail		<b>Alfred Hospital: Alfred Psychiatry (Acute)</b>	Alfred Health (Network)				Health Care a Social Assista
Detail		<b>Angliss Hospital</b>	Eastern Health (Network)				Health Care a Social Assista

3. If an Agency record does not currently exist, click the “Add a new item” button.
4. Complete the **Agency contact** details fields and drop-down menus. Please note that **Agency Name**, Agency Legal Name (please confirm this online to ensure that the multiple entries are not made for the same Agency), **Agency Type**, **Agency Level Template** and **Agency Level** are all mandatory.
5. Tick the required **Discipline** check-boxes which the Agency will be associated with and click the **Save** button.

**RMIT UNIVERSITY**

Request Placement Manage Curriculum Reports Communication Admin

**Agency**

**New Agency Inc**  
 Agency Type: Fast Moving Consumer Goods  
 Level: Group  
 Address:  
 Business Phone: 55556666777

Upload

Details Placement Request Agreements Notes/Docs Incidents Agency Site Visits Process Document Access

**Edit Details**

(\* required field)  
 Agency Name: \*   
 Agency Legal Name:   
 Agency Code:  Agency Type: \*   
 Agency Level Template:  Agency Level: \*   
 Parent Agency:   
 ABN Number:  Business Phone:   
 Fax:  Internet:   
 Email:    
 Active:

Agency Contact Personnel:

Name	Email	Business Phone	Personnel Type	Discipline(s)
No items are available.				

Collapse All  Show All Text  Make Default

(Global)

Description	Value	Expiry
Company Size		[Edit]

6. Update any required **Extended Attribute** values.
7. Expand the **Add Address** header.
8. Complete the address fields and click the **Save** button.
9. Expand the **Add Contact Methods** header.
10. Tick the required check boxes and click the **Save** button.

### Adding the Agency to your Discipline

In order to **record Agency Personnel** or send **Placement or Communication Requests** to the **Agency** (from Request Manager), the Agency must be connected with your Discipline.

If the Agency exists, but is not yet linked to your discipline, update the Agency Discipline details.

**To add an Agency to your Discipline:**

1. Navigate to **Manage > Agency**
2. Complete the **Agency Name** field (use % wild cards if required to narrow your results).
3. Click on the **Filter** button.
4. Click on the **Detail** link for the required Agency.
5. From the **Agency details page**, expand the **Edit Disciplines** header.
6. Tick the required **Discipline** check boxes.
7. Click on the **Save** button.

The screenshot shows the 'Edit Disciplines' interface with a grid of checkboxes for various disciplines. Some are checked, such as Accounting (COB), Information Management, Journalism, and Management. The grid includes categories like Business and Law, Engineering, Health, and Design.

**Agency Personnel**

It is recommended that you ensure all **Agency Personnel details** are up to date. Clicking on the name of the person will open the Personnel details for editing. If the person is no longer a valid contact at the Agency, remove the tick from the **Active** check box.

**To add new Agency Personnel:**

The screenshot shows the 'Add Personnel' form. It includes fields for Personnel Type, Title, Given Name, Surname, Custom Field, Agency Personnel External Identity Code Field, Business Phone, Mobile Phone, Fax, Email, and Experience. There are also checkboxes for Active, Accepted Terms/Conditions, and a list of disciplines to select.

1. Navigate to **Manage > Agency**
2. Expand the **Add Personnel** header.
3. Select the appropriate **Personnel Type**.
4. Complete all fields and drop-down menus.
5. Click on the **Save** button.
6. The new Personnel record will now be listed. If not, tick the **Show All Personnel** check box. Click on the name link to expand the details.
7. There will now be check-boxes available for each **Discipline** connected to the Agency.
8. For all contacts, tick the **Permit view** check box.
  - If the industry contact will be the main contact for the Agency, tick the **Receive Correspondence** check box. At least one personnel must have this flagged or you cannot communicate with the Agency.
  - If the contact details are be viewable by Students (through the student portal) who are placed at the Agency, tick the **Student Contact** check box.
8. Click on the **Save** button.

*\*Note: The Permit view check box must be ticked to view Agency contact details. Agency InPlace Support V4.10 Quick Reference Guide: Agency Maintenance. Page 5 of 7*

Personnel are only viewable to users in the same Discipline. At least one Agency Personnel must be flagged to 'Receive Correspondence' to communicate with the Agency through InPlace.

Student Accommodation Agency Personnel has been saved

Orientation Pack No [Edit]

Vaccinations [Edit]

Other Information [Edit]

Attribute Inheritance

**Addresses**

No items are available

Add Address

**Personnel**

Personnel	Type	Phone	Mobile	Email	Other Details	Student Contact	Discipline(s)	Custom Field	Experience
Jim Jones	Placement Coordinator	11222	33344455	jim@jones.net		No	Pharmacy		

1-1 of 1 items

Personnel Details | **Qualifications** | Personnel Notes/Docs

**Edit Personnel**

Personnel Type: Placement Coordinator

Title: Dr

Given Name: Jim

Surname: Jones

Custom Field: [X Q]

Other Details: Business Phone: 11222, Mobile Phone Number: 33344455, Fax Number: [ ], Email: jim@jones.net, Experience: [X Q]

Active:  Accepted Terms/Conditions: False

**Disciplines**

Permit View  
 Receive Correspondence  
 Student Contact  
 Pharmacy

Save Delete Cancel

**Contact Methods**

Add Contact Methods

**Disciplines**

Edit Disciplines

Pharmacy

### Adding a Note or Document:

Notes and Documents can be added to Student, Agency, Placement, Course, Allocation Groups and Placement Agreement records. The steps to add a Note or Document are the same regardless of which record you are adding the note to.

#### To add a Note:

1. Click the **Notes/Doc** or **Notes** tab.
2. Expand the **Add Note** header.
3. Complete the **Date**, **Title** and **Text** fields.
4. To display an alert on the Home page, complete **Reminder Date** and **Reminder Text** fields.
5. If the **Private Note** check-box is not ticked, the Note will be viewable by all staff who are have permission to view the Agency's Discipline.
6. Click on the **Save** button.

**Add Note**

Date (dd/mm/yyyy):\* 25/10/2017

Title: Important reminder

Text: \*

File Edit Insert View Format Table

Formats Font Sizes B I [List Icons]

Don't forget!

Reminder Date (dd/mm/yyyy): 27/10/2017

Reminder Text: Don't forget this!

Private Note:

Save Cancel

**To add a Document:**

1. Click the **Notes/Doc** or Document tab.
2. Expand the **Add Document** header.
3. Complete the **Title** and **Description** fields.
4. If you want an the Document to be viewed by Students, tick the **Shared With Students** check-box and select which **Disciplines** will have access to view it.
5. Click on the **Select File** button and select the required document from your local drive.
6. Click on the **Save** button.

Documents

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List of Documents

	Title	Name	Description	Shared With Student
<a href="#">Detail</a>	Rod's Resume	test.bd	Updated 2017	Yes
<a href="#">View</a>				

**Edit Document**

Title:

Description:

Shared With Students

Select Disciplines to Share Document with:

3 selected

Select File:  [View Document](#)

For further assistance, please contact your school's WIL team or visit [InPlace Support Online Help](#) or contact the InPlace Business Support Team at [inplace.support@rmit.edu.au](mailto:inplace.support@rmit.edu.au)