Activities Admin Guide

February 2023

Contents

Overview

Schools are busy places with a diverse range of activities taking place on any one day. Learning is no longer restricted to the classroom and may take place in a variety of contexts. Together with the mix of co-curricular activities offered in most schools, this presents the need for an efficient system to manage the complex nature of today's daily routines.

The Activities module offers a highly configurable structure for organising, managing and monitoring student activities and excursions relevant for your school.

Work with your school's leadership team to decide the features and functions of the Activities modules are suitable for your school's situation. Consider the following:

- Centralised venue management
- User defined categories and types
- Activities approval and risk management processes, permissions, payments and attendance tracking
- Reporting functionality for comprehensive information about any activities and excursions
- Search and filtering functionality with options to monitor student and run reports
- Integration with other Sentral modules such as Attendance, Finance, and Portal
- Visibility over student participation in extra curricula activities
- Management of permissions, payments, and student registrations
- Ability to award students points for participation or completion of extra curricula requirements.

Disclaimer

This document is a guide only, and Sentral accepts no liability for your configuration of the software.

Product versions

Your school will have one of the products listed in the Feature availability table below – with the main difference being the Classic versus Indigo user interface.

Differences exist between product versions, and between states due to curriculum differences. These differences are described at a feature level in this guide.

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Activities	■	■	■	■

Permissions

Overview

Administration of this module is usually assigned to a select group of staff with access to all the functionality in the module. Your school is responsible for applying access levels for staff that determines the actions they can perform in the module.

There are two main scenarios:

- Your school is new to Sentral
- Your school already uses Sentral, and existing access levels are in place.

New Sentral customer

Use your Global Admin account to apply Activities Admin permissions to selected staff. If required, configure the access levels further to control the actions they can perform in the module.

For details, refer to the following guides in the Help Centre:
- Admin Guide – Induction for New School
- Admin Guide – Setup
- Admin Guide – Getting Started with Sentral.

Existing Sentral customer

Check the configuration already in place. It may not be out-of-the-box.

For details, refer to the following guides in the Help Centre:
- Admin Guide – Induction for New School
- Admin Guide – Setup
- Admin Guide – Getting Started with Sentral.

Access

To access Activities from the Sentral home screen:

Select the menu icon (⠿) and choose Activities.

Select ⚙ Setup and choose Activities Setup.

Considerations

Implementation options

There are two approaches to setting up Activities:
- The first is to configure both the pre-activity approval workflow and the post activity approval workflow.
- The second is to start with configuring the post activity approval workflow – addressing the pre-approval workflow at a later stage.

Pre-activity approval workflow

This stage is where you organise the approval workflow for school activities (incursions, excursion, sports, etc.) according to school policy. Your configuration can reflect school policy relating to internal activity approval, which might include factors such as cost, Supervisor/Executive approval, and risk assessment.

Post-activity approval workflow

This stage is where you manage and organise student/staff attendance and permission forms and/or payment for various school activities. It allows your school to:
- track student involvement in activities and attendance at activities
- organise and track permission forms, as well as invoices if this is applicable for your school.

School settings

Action

Check the information in school settings.

Select ⚙ Setup and choose School Details.

Reason

This module draws details such as the school's name, address, logo and principal's name from the General Setup section of Sentral.

Data synchronisation

Action

Manage data synchronisation. This is updated at 5am daily but you can choose to do a manual override.

Select ⚙ Setup and choose Data Synchronisation.

Reason

Student information is correct, roll classes and teacher allocations are up to date.

Action

Link staff details to their data layer source (EBS4, Eduhub, Edsas, Cases, Enrolments).

Select ⚙ Setup, select Manage User Accounts, and then choose Edit. In User Details, use the search box at the find the staff member in your school's administration system, and then select Save.

Reason

This makes staff visible in activities.

Import

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Import			■ Available to some independent schools	

Action

Decide if you will use the option to import activities. Either import activities/events in .xls format by category of activities (e.g. music activities, sports activities), or alternatively, just configure the module to your school's needs and according to current policies. For more, see Import sports activities

Reason

This enables you to consolidate and streamline your school management systems.

Categories

Description

Categories are the broadest way of defining activities, according to 'life of the school'. For example, academic, excursions, sports.

Action

Define the categories of activities to suit your school's situation, keeping in mind the likely approval workflow or process.

Reason

You can only assign one approval workflow/process to category of activities.

Cycles

Description

The Activity cycle refers to how often the activity is recurring. For example, semester, weekly, winter/summer). Once the activity is completed it will roll over with the same details and attendees in the interest of time efficiency.

Action

Review the built-in default cycles such as annual, seasonal, semester and term.

Define custom cycles such as weekly, fortnightly to suit the cycle of activities occurring at your school.

You can edit cycle start and end dates.

Portal

Action

Review current channels used for communicating to parents and students about various activities and excursions.

- If your school currently uses paper-based permissions, activity selection and payments, consider activating the Parent and Student Portals for your digital transformation.
- If you school already uses the Portal, visit the Portal Console module and determine which aspects of the Activities module to switch on for parents and students.

Reason

Digital transformation offers numerous benefits.

Staff notifications

Action

Consider your school's current policy and procedures for approving excursions, activities, and risk assessments.

Reason

The Activities module has areas to notify staff to action or approve activities.

Approval workflow

Description

The Activities module includes a default approval workflow that you can edit and assign to various activities categories. You can create multiple approval workflows to cater for internal variance in policy due to updates or requirements.

Default approval workflow

Steps	Visibility (Yes/No)	Assign approver(s)
Proposed	Yes	Anyone
Executive approval	Yes	Anyone
Costing approval	Yes	Anyone
Permission/Payment approval	Yes	Anyone
Ready to run	Yes	Anyone

> **Tip:** *You must assign Approvers according to their current role in the school's process.*

> ⚠ **Warning:** *You are restricted to assigning one workflow to a Category of activities in the Categories setup.*

Action

Review your school's current policies and processes when you're planning how to set up approval workflows. Remember to check for paper-based documents and forms.

Reason

Efficiency. Workflows need to reflect your school's current policy in relation to activity approval, management, and attendance.

Configure global settings

Good practice suggestion

Work through the menu options in the following sequence.

Reason

The general settings you define here control how the module behaves, what it displays and what is required. The module has some defaults to allow for quick usage, but we recommend going through each variable.

> ▶ **Video:** *Watch this video to learn about the Global Config settings within Activities setup.*
>
> *Activities Setup | Settings within Activities*

Review Global Config settings

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Settings			■	■
			Additional settings	Additional settings + Enforce Category points limit
Activity Roll settings		■	■	■
		Create attendance absence on activities roll submit	Additional settings for Transport	Additional setting for Transport
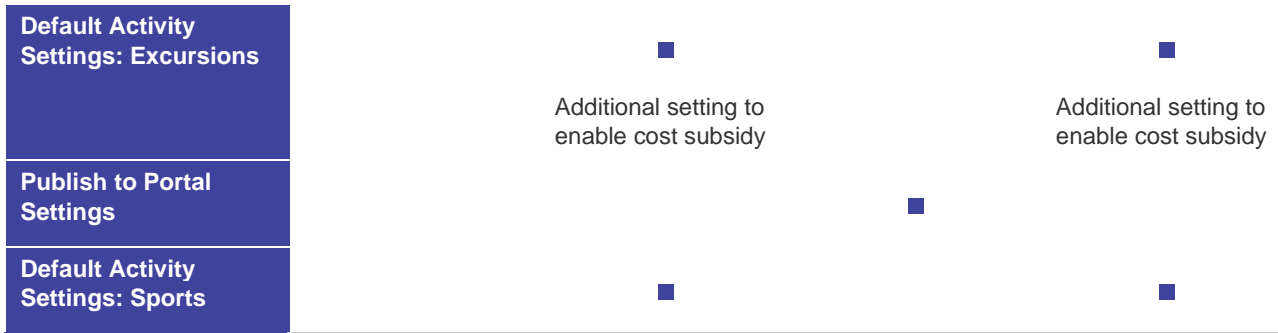
Default Activity Settings: Excursions	▪ Additional setting to enable cost subsidy	▪ Additional setting to enable cost subsidy
Publish to Portal Settings	▪	
Default Activity Settings: Sports	▪	▪

1. Select the menu icon (⣿) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Settings.

3. Under Settings:

   a. (ST version) Specify whether to use Activity points and enforce Category points limits.

   b. (MT version) You have additional settings to work through. Review the explanations on screen.

      i. Specify whether to show Category sections.

         This adds a Categories sections option in the left menu. This allows you to define an additional hierarchy for the categories. You might choose to use this feature if your school has different campuses or you need to separate Primary, Junior and Senior student activities.

         For example, Category Section = Campus A, Category = Community Service, Activity = Red Shield Appeal.

      ii. Specify additional settings to suit your school's situation for Risk Assessment forms, Approval forms, Student Selections cap, Sports dashboard, Music dashboard.

4. Specify settings in the following sections:

   Your version of Sentral and the modules configured at your school determine the options available.

   — Activity Roll Settings
   — Default Activity Settings: Excursions
   — (MT version) Publish to Portal Settings
   — (MT version) Default Activity Settings: Sports

5. Select Save.

Configure categories

Overview

Use the information in this section to create the high-level categories of activities that take place at your school. Some Activity categories are set up by default. You have the option to remove or add to the default categories. Once you have created categories, you can add the actual excursion or activity group.

> ▶ **Video:** *Watch this video to learn about creating categories and groups within Activities setup.*
>
> *Activities Setup | How to create categories and groups*

To add a category

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Max points per activity + Default points		■		■
Co-Ordinators		■	■	■
Specialty Groups			■	■

> **Tip:** *Consider the approval process when you're adding categories. You can only assign one approval workflow/process to one category of activities. If you have different categories of activities with different approval workflows, create approval workflows to go with them first.*

1. Select the menu icon (⦂⦂⦂) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Select New Category.
4. Enter a name for the category.
5. Select the type of activity.
   The options available vary according to your school's Sentral product version. The option you select determines the user interface that displays for teachers when they create an activity.
6. Select a default cycle for the activity category to specify when the activity will occur.
7. Select an approval workflow to specify how the activity will get approved.
   You are limited to assigning one approval process to each activity category.
8. Select Add.
   Additional fields display for you to add more information. Completing the additional fields is optional.
9. (Optional) Do any of the following:
   a. Add a category label.
   b. (ST, S1 versions) Enter maximum points per activity.
      Points accumulate indefinitely if you don't set a maximum. The system awards maximum value to a student if the points cap is reached for that category.
      System rules control maximum points per category and per activity. For example, maximum points per category needs to be greater or equal to maximum points per activity.
   c. (ST, S1 versions) Enter default points per activity.
      The value for Default Points needs to be less than or equal to the value entered in the Max Points Per Category field. The value for Default Points needs to be less than or equal to the value entered in the Max Points Per Activity field.
   d. Select one or more staff members from the Co-ordinators list.
   e. (S1, ENT versions) Select an option from the Specialty Groups list to specify staff responsible for the activity. For example, music or coaching staff.
10. Select Save.

To add a category group

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Groups section		■		■

Use the information in this section to define groups within categories.

> **Tip:** *Consider using Groups to highlight the type of the Activity category. For example, within the category called Sport, you could create groups such as Netball, Basketball, Football, Swimming.*

To edit a category

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Select Edit next to a category.
4. In Edit Category, update Category information.
5. Select Save.

To remove a category

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Select Remove next to a category.
4. Select Confirm.

To re-order activity categories

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Use the drag handles icon (≡) to move the position of a category in the list.

To add a group within a category

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Select the category for which you want to define a group.
4. Under Groups in [category name], enter a name for the new group and select Add.
5. Select Rename next to the group to update the group.
6. Select Remove next to the group, and then select Confirm.

To rename or remove a group within a category

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Select the category containing the group.
4. Under Groups in [category name], do one of the following:
   a. Select Rename next to the group to update the group.
   b. Select Remove next to the group, and then select Confirm.

To display excursion categories on the home screen

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Categories.
   The Activity Categories screen displays.
3. Select up to three excursion categories from the list, and then select Save.

Configure venues

Overview

Use the information in this section to organise frequently used venues into logical groups. The quick overview of available spaces and resources makes planning for future activities simpler. This makes it easy for staff from various faculties to identify all venue types and locations.

Example

You can add one or more specific venues for an event.

Venue Group: Sports

Venue: Cricket Grounds

Venue Grounds: Cricket Ground A, Main Ground

Schools can export venue data and import.

To add a new venue group

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Venues.
   The Venue Groups screen displays.
3. Select the New Venue Group.
4. Enter a name for the venue group and select Add.
   The venue group is added to the list – displayed in alphabetical order.

To add a venue to a venue group

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Import/Export venue data			■	■

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Venues.
   The Venue Groups screen displays.
3. Select Edit next to a Venue Group.
4. Under Venues in [venue group], enter a name for the new venue, and then select Add.
5. (S1, ENT versions) Select Edit Address next to a venue.
   a. Enter address details.
   b. Enter a Map URL.
   c. Select Save

To import venue information

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Import venue data			■	■

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Venues.
   The Venue Groups screen displays.
3. Select Edit next to a Venue Group.
4. Under Venues in [venue group], select Choose file, select the file to upload, and then select Import Venue Data.

To export venue information

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
/Export venue data			■	■

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Venues.
   The Venue Groups screen displays.
3. Select Edit next to a Venue Group.
4. Under Venues in [venue group], select Choose file, select Export Venue Data.
   The data is exported to a CSV file.

To edit venue information

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Venues.
   The Venue Groups screen displays.

3. Select Edit next to a Venue Group.

4. Under Venues in [venue group], do any of the following:
   a. (S1, ENT versions) Select Edit address next to a venue. Update the address or URL and then select Save.
   b. Select Rename next to a venue, enter a new name, and then select Rename.
   c. Select Remove next to a venue to delete the venue from the list.

Configure cycles

Overview

Use the information in this section to configure cycles. Cycles define the frequency of the activity.

You have the following options for working with cycles:
- Use the series of built-in cycles such as semester, seasonal, term or annual
- Edit any of the built-in cycles
- Add custom cycles such as weekly, daily.

Tip: Cycle instances that you create under the built-in cycles will automatically roll over at the start of each year.

To edit a built-in cycle

1. Select the menu icon (⁙) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Cycles.

3. Under Built-In Cycles, do one of the following:
   a. Select Edit next to the cycle.
   b. Select the link in the Periods column.

4. Under Edit Cycle, do any of the following:
   a. Update the name of the cycle.
   b. Select an option from the Active Instance list.
   c. Select Save.

5. Under Periods in [cycle name), select Rename, enter a new period name, and then select Rename.

6. Under Cycle Instances, select Edit next to an instance.

7. In Edit Cycle Instance, update any of the following information:
   — Period
   — Year
   — Name
   — Code

8. Select Save.

To add a new custom cycle

1. Select the menu icon (⁙) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Cycles.

3. Under Custom Cycles, enter a name for the custom cycle and select Add New Cycle.

4. (Optional) Under Edit Cycle, do any of the following:
   a. Update the name of the cycle.

b.   Select an option from the Active Instance list.

c.   Select Save.

5.   Under Periods in [cycle name), enter a new period name such as Monday, Tuesday, and then select Add.

6.   Under Cycle Instances:

a.   Select a period from the list.

b.   Select a Year from the list.

c.   Enter a display name for the cycle instance.

d.   Select Add. The Active Instance is created.

Configure student portal settings

Overview

Use the information in this section to:

- turn on the option for students to self-register for activities via the student portal
- specify the number of selections available to students
- specify the time period in which selections can be made.

> **Note:** *For this option to work the Student Portal needs to have already been enabled.*

To turn on self-registration

1.   Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2.   Select Setup in the left menu and choose Student Portal.

3.   In Student Portal Settings, select On next to Student Self Registration.

4.   Select Save.

To define access for student self registration portal

1.   Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2.   Select Setup in the left menu and choose Student Portal.

3.   In Student Portal Settings:

a.   Specify whether to reject on approval

a.   Specify the minimum and maximum required number of student activity selections.

4.   Select the current selection period from the list.

5.   Select Save.

To add selection periods for student portal settings

1.   Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2.   Select Setup in the left menu and choose Student Portal.

3.   Under Selection Periods on the right, do one of the following:

a.   Enter a name, select one or more terms, and then select Add.

b.   Select a period from the list.

i.   View the details for the selected period.
ii.   Update details.
iii. Select Save.

Configure Approval/Risk Management

Overview

Use the information in this section to:

- manage templates for approval requests and risk assessments to suit your school's policies for various types of activities.
- enable notifications for selected stakeholders to be notified at various stages of the approval.

You have the following options for working with approvals and risk assessment:

- Use the built-in templates
- Edit any of the built-in templates
- Add your own custom templates.

Tip: Use the templates (Approval/Risk Assessment) to turn your current paper forms into electronic forms.

Video: Watch these videos on our YouTube channel to learn about creating approval request templates and risk assessment templates.

Activities Setup | Create an Approval Request Template

Activities Setup | Create a Risk Assessment Template

To view template content

1. Select the menu icon (⁙) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Approval/Risk Assessment.
3. Select a template link in the Name column.
4. View template details – the sections and fields.
5. Select Cancel to return to the previous screen.

To add a new custom template

1. Select the menu icon (⁙) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Approval/Risk Assessment.
3. Do one of the following:
    a. Under Approval Templates, enter a name for the template and select Add.
    b. Under Risk Assessment Templates, enter a name for the template and select Add.
    A blank template is created – ready for you to add content.
4. To add sections and fields, select Edit next to the template.

5. Add sections and then within the sections add fields,

6. Save your changes.

To create a new template (copy and edit)

Part 1 – Copy and rename existing template

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Approval/Risk Assessment.

3. Find the template you want to copy – in either the Approval Templates section or the Risk Assessment Templates section.

4. Select Copy next to the template.
   The new template is added to the list with 'Copy of' as part of the template name.

5. Select Rename next to the template.

6. Enter a new name for the template and select Rename.

Part 2 – Edit copied template

1. Do one of the following:
   a. If the Approval/Risk Assessment screen is already open, select Edit next to the template you copied and renamed.
   b. Select the menu icon (⋮⋮⋮) and choose Activities.
      i. Select ⚙ Setup and choose Activities Setup.
      ii. Select Setup in the left menu and choose Approval/Risk Assessment.
      iii. Select Edit next to the template you copied and renamed.

2. Review the sections in the template against your school's requirements for an activity.

3. Do any of the following with sections:
   a. To add a section:
      i. Under the template header, enter a section name, and select Add Section.
         The new section displays at the bottom of the screen.
      ii. Use the drag handles (≡) next to the section header to change its position.
   b. To copy a section:
      i. Select Copy Section next to a section header.
         The new section displays immediately below the section you copied.
   c. To delete a section that isn't required:
      i. Select Delete next to the section header.
      ii. Select OK to confirm.
   d. To rename a section:
      i. Select Rename next to the section header.
      ii. Enter the new name and select Rename.

4. Do any of the following with fields:
   a. To add a new field to a section:
      i. Select Add Field next to the section header.
      ii. In Add field, enter a name.
      iii. Specify the type of field using the dropdown list.
      iv. Select Save.
         The field is added to the bottom of the section.
   b. To edit an existing field, select Edit next to the field and do any of the following:
      i. Update the name of the field.

      ii.   Select a different field type.

      iii.   Select Save.

  c.   To delete a field, select Delete next to the field, and then select Confirm.

  d.   To re-position a field, use the drag handles (≡) next to the field.

To configure notifications for approval and risk assessment workflows

1. Do one of the following:

  a.   If the Approval/Risk Assessment screen is already open, view the Notifications section.

  b.   Select the menu icon (⋮⋮⋮) and choose Activities.

      i.   Select ⚙ Setup and choose Activities Setup.

      ii.   Select Setup in the left menu and choose Approval/Risk Assessment.

      iii. View the Notifications section.

2. Review the notification settings and their descriptions.

3. For each workflow phase, select one or more staff members to receive a notification.

4. Select Save.

Configure letter templates

Use this section to set up Permission Form Request templates for communicating with parents.

There are two sections that you can design to mimic the 'paper permission form' where the bottom part can be torn off, signed and sent back to school as consent.

> ℹ **Note:** *Creating templates here makes them available for selection when staff members want to create a permission note for an activity that can get sent to parents as a paper-based form, an attachment to an email or an attachment to a newsfeed.*

> ▶ **Video:** *Watch this video to learn about creating letter templates within Activities setup.*
>
> *Activities Setup | Create Activities Letter Templates*

To create a new letter template for activities

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Letter Templates.

3. Select New Letter Template.

4. Enter a name and select Add.

   The new template displays. The top and bottom sections are blank – ready for you to add your own content.

5. Specify whether to show the page number and date in the footer of the template.

6. Do any of the following:

  a.   Enter text and use the menu options to include merge fields in the Top Content section and Bottom Content section.

  b.   Copy and paste content from an existing template into the new blank template, and then edit the content.

7. Select Save.

To edit an existing letter template for activities

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Letter Templates.
3. Select Edit next to a template.
4. Do any of the following:
    a. Update the template name.
    b. Change the setting for Show Page Footer.
    c. Update the information in the Top Content section. Make use of the merge fields available.
    d. Update the information in the Bottom Content section. Make use of the merge fields available.
5. Select Preview to check content and formatting.
6. Select Save.

To remove a template

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Letter Templates.
3. Select Remove next to a template.
4. Select OK to confirm.

Configure absence reasons

Use this section to specify the absence reasons available for selection when teachers mark the roll for activities.

There are three inbuilt absence reasons available:

- Absent (Unexplained)
- Absent (Exempt)
- Sick.

You have the option to link each reason back to an appropriate attendance reason.

Depending on your school's version of Sentral, you may also be able to add additional reasons, as well as choose whether to enable and disable reasons.

▶ **Video:** *Watch this video to learn about the ST versions of absence reasons within Activities setup.*

Activities Setup | Absence Reasons

To edit an absence reason

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Absence Reasons.
3. Select Edit next to an absence reason.
4. Select a linked attendance reason from the list.

5. Select Save.

To add an absence reason

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Add Reason button			■	■
Enable and Disable buttons			■	■

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Absence Reasons.
3. Select Add Reason.
4. In New Absence Reasons:
   a. Enter a description
   b. Enter the shorthand (abbreviation).
   c. Specify whether the reason is exempt.
   d. Select a linked attendance reason from the list.
   e. Specify the default – Yes or No.
   f. Select Save.

To add a portal absence reason

Use these steps to add an absence reason visible in the parent portal.

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Portal Absence Reasons button			■	

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Absence Reasons.
3. Select Portal Absence Reasons next to an absence reason.
4. In Editing Portal Absence Reasons, select Add Reason.
   Additional fields display.
5. Enter a description and a shorthand description (abbreviation).
6. Select Save.
   The reason is listed next to the absence reason in the Portal Reasons column.

To edit or remove a portal absence reason

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)

| Portal Absence Reasons button | | | ▪ | |

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Absence Reasons.
3. Select Portal Absence Reasons.
4. In Editing Portal Absence Reasons, do any of the following:
   a. Update the description or shorthand fields and select Save.
   b. Select the Remove icon (🗑) next to the reason and select Save.

Configure settings

Overview

Use the information in this section to specify the settings for activities, as well as integrations with other modules such as Attendance and the Portal.

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Default Activity Settings: Sports section			▪	▪
Publish to Portal Settings section			▪	

▶ **Video:** Watch this video to learn about the Settings menu within Activities setup.

[Activities Setup | Settings within activities](#)

To configure settings section

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Settings section – additional fields			▪	▪
			Additional fields:	Additional fields:
			Show Risk Assessment Forms	Show Risk Assessment Forms
			Show Approval Forms	Show Approval Forms
			Show Categories Sections	Show Categories Sections
			Student Selections Cap	Student Selections Cap
			Show Sports Dashboard	Show Sports Dashboard

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Settings.
3. Review the descriptions for each setting to understand what each option controls.
4. Specify the options to suit your school's situation.
   a. If you're finished configuring all settings, select Save. Otherwise, see To configure Activity roll settings
   b. Select Save.

To configure Activity roll settings

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Activity Roll Settings section – additional fields			■ Additional fields: Non-enrolled students in rolls Default Transport Roll Attendance Status	■

1. Do one of the following:
   a. If Activities Setup is already open, go to the next step.
   b. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Settings.
3. Under Activity Roll Settings, review the descriptions for each setting to understand what it controls.
4. Specify the options to suit your school's situation.
5. If you're finished configuring all settings, select Save. Otherwise, see To configure default print activity roll settings

To configure default print activity roll settings

1. Do one of the following:
   a. If Activities Setup is already open, go to the next step.
   b. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Settings.
3. Under Default Print Activity Roll Settings, review the descriptions for each setting to understand what it controls.
4. Specify the options to suit your school's situation.
5. If you're finished configuring all settings, select Save. Otherwise, see To configure default activity settings for excursions

To configure default activity settings for excursions

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Default Activity Settings: Excursions section		■ Additional field: Enable Cost Subsidy		■ Additional field: Enable Cost Subsidy

1. Do one of the following:
   a. If Activities Setup is already open, go to the next step.
   b. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Settings.
3. Under Default Activity Settings: Excursions, review the descriptions for each setting to understand what it controls.
4. Specify the options to suit your school's situation.
5. Do one of the following:
   a. If you're finished configuring all settings, select Save.
   b. (ENT version), see To configure publish to portal settings
   c. (S1 version), see To configure default activity settings for sports

To configure publish to portal settings

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Publish to Portal Settings section			■	

1. Do one of the following:
   d. If Activities Setup is already open, go to the next step.
   e. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Settings.
3. Under Publish to Portal Settings, specify whether to create invoices for parents when an activity is published to the portal.
4. Do one of the following:
   a. If you're finished configuring all settings, select Save.
   b. (ENT, S1 versions) Otherwise, see To configure default activity settings for sports

To configure default activity settings for sports

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Default Activity Settings section			■	■

1. Do one of the following:
    a. If Activities Setup is already open, go to the next step.
    b. Select the menu icon (⣿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Settings.
3. Under Default Activity Settings, review the descriptions for each setting to understand what it controls.
4. Select Save.

Configure additional fields

Overview

Use the information in this section to customise fields that might be required when creating an activity or event. For example, Opal Card number.

> ▶ **Video:** *Watch this video to learn about creating additional fields within Activities setup.*
>
> *Activities Setup | Create additional fields for activities*

To add additional fields

1. Select the menu icon (⣿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Additional Fields.
3. Select Add Additional Fields.
4. Enter a name for the field.
5. Specify details such as the type of field, as well as its minimum and maximum length.
6. Specify the values the field accepts.
7. Choose whether to apply the field to:
    — Categories – and then select one or more specific categories.
    — Activity types – and then select one or more specific activity types.
    — Activity attendees.
8. Select Save.

To edit additional fields

1. Select the menu icon (⣿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Additional Fields.
3. Select Edit next to a field.
4. In Edit Additional Field, update any of the settings and select Save.

To delete additional fields

1. Select the menu icon (⣿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Additional Fields.
3. Select Delete next to a field.

4. Select OK to confirm.

Configure approval workflow

Overview

Use the information in this section to configure the module to reflect school your school's policies for various activities or programs such as those listed below:

- on site/off site
- incursions/excursions
- domestic excursion/international/interstate excursion
- sports/CAPA activities.

You have two options for configuring approval workflows:

- Use the default approval workflow
- Edit the default approval workflow.

> **Note:** *The Approval Workflow menu is what you use to create workflows. Once you've done that, the Setup Categories menu is where you assign the workflow to a category.*

> **Warning:** *You are restricted to assigning one workflow to a Category of activities in the Categories setup.*

> **Video:** *Watch this video to learn about creating approval workflows within Activities setup.*
>
> *Activities Setup | Creating approval workflows*

To edit an approval workflow

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Approval Workflow.

3. Review the workflows listed.
   a. Check the categories currently using the workflows.
   b. Check the current steps.
   c. Decide if you will use the default workflow, edit the default workflow or create a new approval workflow.

4. Select Edit next to an approval workflow.

5. Do any of the following:
   a. Update the name and description of the workflow.
   b. Update approval step details.
      i. Select Edit next to the step.
      ii. Update details.
      iii. Specify visibility and approval settings.
      iv. Select Save.
   c. Add an approval workflow step.
      i. Select Add Approval Workflow Step.

ii. Enter a name for the step and select Save.

    d. Assign approvers to an approval step.

        i. Select Assign Approver next to the step.

        ii. Select the groups and user to assign to the step.

        iii. Select Save.

> 💡 **Tip:** *You must assign Approvers according to their current role in the school's process.*

    e. Re-order approval steps.

        i. Use the drag handle icon to change the order of steps.

        ii. Select Save.

    f. Remove a step in the approval workflow.

        i. Select Remove next to the step.

        ii. Select Confirm.

To add a new approval workflow

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Approval Workflow.

3. Select New Approval Workflow.

4. Enter a name and description for the workflow and select Save.

5. Select Edit next to the approval workflow.

6. Add approval workflow steps and assign approvers to each step. See To edit an approval workflow

    Select Save.

To disable or delete an approval workflow

Use these steps to disable or delete custom workflows. You can't delete the default workflow.

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.

2. Select Setup in the left menu and choose Approval Workflow.

3. Check the Used By column.

    a. If the approval workflow is used by a category, go to Setup | Categories, and then edit or remove the category so that it is not assigned.

    b. If the approval workflow is not assigned, the Disable and Delete buttons are enabled.

4. Do one of the following:

    a. Select Disable and then select Confirm.

    The approval workflow is listed under Disabled Approval Workflows – and you have the option to enable it in the future.

    b. Select Delete and then select Confirm.

    The approval workflow is removed from the list of workflows.

Configure Positions Register

Feature availability

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)

Overview

Use the information in this section to add various sports to the register and nominate the positions played within the sport. For example, Football – defender, goal keepers, mid fielder.

> ⓘ **Note:** *This is only relevant if your school wants to set up co-curricular activities such as sport. Don't use this for regular activities within the module.*

To add a new position group and positions

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Positions Register.
3. Select Add New Position Group.
4. Enter a name for the Position Group and select Add.
   The Position Group is added to the list – ready for you to add positions.
5. Select Edit next to the position.
6. Under Positions in [Group], enter a position name and select Add.
   The position is listed.

To edit or remove a position group

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Positions Register.
3. Select Edit next to a position group, Update the name of the position group and select Save.
4. Select Remove next to a position group and select Confirm.

To edit or remove a position

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Setup in the left menu and choose Positions Register.
3. Select Edit next to a position group.
4. Do any of the following:
   a. To rename a position, select Rename next to a Position and then select Save.
   b. To remove a position, select Remove next to a Position.

Imports (Enterprise Schools ONLY)

Schools should only implement these with their Implementation Manager so the concept can be understood.

Import sports activities

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Sports Activities menu			■ Available to some independent schools	

Overview

Use the information in this section to import sports activities using Excel files.

To download a sample template

Follow these steps to download a template that you can use to build the activities outside of the system first and then import the correctly formatted Excel file.

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Import in the left menu and choose Sports Activities.
3. Select the Download Template link at the top of the screen.

To import file

1. Select the menu icon (⋮⋮⋮) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Import in the left menu and choose Sports Activities.
3. Select Choose File and select the correctly formatted Excel file.
4. Select one of the following options:
   — Wipe all the data before import
     This option wipes all co-curricular type activity data before imprinting. It does not affect standard activities.
   — Dry Run,
5. Select a cycle instance for the import.
   This is only applicable to schools using co-curricular activities such as Saturday sport.
6. Select Import.
   An import log displays the imported files.

Import music activities

	Sentral Classic (ST)	Sentral Cloud (ST)	Sentral Enterprise (MT)	Sentral ONE (S1)
Music Activities menu			■ Available to some independent schools	

Overview

Use the information in this section to import music activities using Excel files.

To download a sample template

Follow these steps to download a template that you can use to build the activities outside of the system first and then import the correctly formatted Excel file.

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Import in the left menu and choose Music Activities.
3. Select the Download Template link at the top of the screen.

To import file

1. Select the menu icon (⠿) and choose Activities. Select ⚙ Setup and choose Activities Setup.
2. Select Import in the left menu and choose Music Activities.
3. Select Choose File and select the correctly formatted Excel file.
4. Select one of the following options:
   — Wipe all the data before import
      This option wipes all co-curricular type activity data before imprinting. It does not affect standard activities.
   — Dry Run,
5. Select a cycle instance for the import.
   This is only applicable to schools using co-curricular activities.
6. Select Import.
   An import log displays the imported files.

Appendix A

Summary checklist

Use the table below as a guide for getting your Activities module up and running in no time.

Summary checklist

Module	Checklist	Review frequency
Settings	Review the default settings and adjust to current school requirements.	Annually
Categories	Great consideration needs to be given to this section, so all relevant school activities categories are set from the very beginning in a structured way.	On an annual basis
Venues	List all most often used venues/locations for a quick dropdown list selection.	Regularly
Cycles	Review default cycles and add required cycles.	Once
Approval/risk assessment	Start with the default templates and add/delete fields. First try to replicate the form currently used (either paper or file).	Annual
Approval workflow	Start with the default workflow. First try to replicate the process currently used internally. You might need to do an assessment of current processes.	Annual

Appendix B

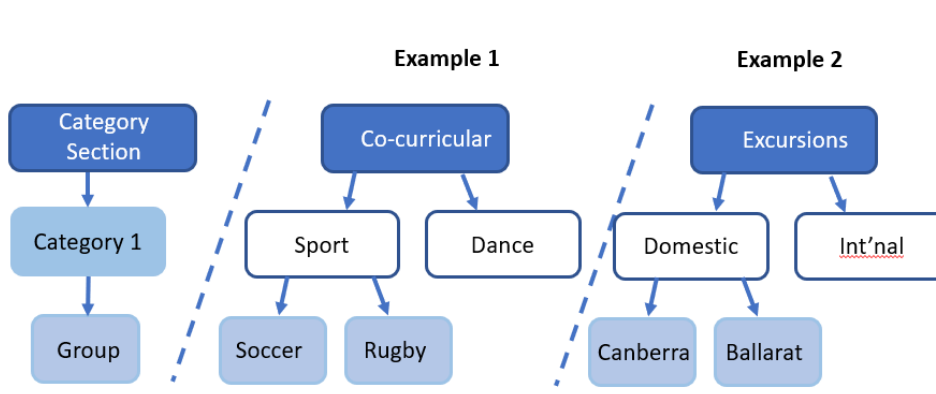## Categories sections – example

Diagram to explain Category section, Categories, and Groups

The screen capture below shows you how Category section, Category and Group information displays on the home screen.

Home screen example showing Category section, Category and Group information