Activities Admin Guide

December, 2024

Contents

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Overview

Needs updating.

What problem does this module solve?

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.

Sentral Activities offers a highly configurable structure for organising the events and activities relevant for any school. Administrators can organise activities logically with user-defined categories, creating a centralised environment for managing all activity related matters.

Staff can easily be assigned to various roles and responsibilities within each activity, with a system for creating and managing associated risk assessments integrated into the module. This ensures appropriate supervision and compliance for each activity.

An intuitive and configurable home page provides quick oversight of scheduled excursions and activities and a summary of activities assigned to each staff member. Maintaining transparency of past, current and upcoming activities assists teachers and administrators in efficiently managing their daily routines.

How does Sentral solve this?

The Sentral Activities module:

- The ease of configuring this module ensures that schools can start managing and monitoring student activities and excursions providing a holistic view of student participation and movement. General criteria, outcomes, risks, and approvals can be tracked and monitored so learning experiences are meaningful and extra curricula Activities tracked.

- Centralised venue management

- User defined categories and types

- Completely configurable to a school's specific policies and processes

- Plan, manage and implement excursions and Activities

- Activities approval and risk management processes, permissions, payments and attendance tracking

- Comprehensive information about any Activities or excursion with reporting functionality

- Logical search and filtering functionality with options to monitor student and run reports.

- Integration between modules and visibility over student participation in extra curricula

- Manage permissions, payments, and student registrations

- Award students points for participation or completion of extra curricula requirements.

Who will use and get value from this module?

The Activities module will be used by all staff with a focus on staff who handle student excursions, approvals, and risk management. General staff have access however may be required to follow school processes and polices. A deep understanding of current school policies and procedures is essential to ensure student monitoring is centralised and transparent. The Activities module also benefits the student and parent community at large to provide time efficient data, notifications and online approvals and payments.

Getting started

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.

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**.

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.

Steps

Follow the steps below to review Global Config settings.

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Settings**.

4. Under Settings:

   a. Specify whether to use Activity points and enforce Category points limits.

   b. Specify whether to show risk assessment forms.

   c. Specify whether to show approval forms.

   d. Specify whether to show Category sections.

      This adds another Categories section setup 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.

      > ☆ **Example:** Category Section = Campus A, Category = Community Service, Activity = Red Shield Appeal.

   e. Specify settings to suit your school's situation for Student Selections cap, Sports dashboard, Music dashboard.

5. Specify settings in the following sections:

   > ⓘ **Note:** Your version of Sentral and the modules configured at your school determine the options available.

   - Activity Roll Settings
   - Default Print Activity Roll Settings
   - Default Activity Settings: Excursions
   - Publish to Portal Settings
   - Default Activity Settings: Sports.

6. Select **Save**.

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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**

Add a category

Feature availability (waiting on SME confirmation)

> **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.
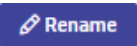
1. Select the menu icon and choose Activities.

2. Select Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

   The Activity Categories screen displays.

4. Select **New Category**.
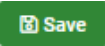
5. Enter a name for the category.

6. Select the type of activity.

   The options available vary according to your school's Sentral product version. The option you select determines the choices available for teachers when they create an activity.

7. Select a default cycle for the activity category to specify when the activity will occur.

8. Select an approval workflow to specify how the activity will get approved.

   You are limited to assigning one approval process to each activity category

9. Select **Add**.

   Additional fields display for you to add more information. Completing the additional fields is optional.

10. (Optional) Do any of the following

  a. Add a category label.

  b. Choose a section and activity group.

  c. Enter maximum points per activity.

  d. Points accumulate indefinitely if you don't set a maximum.

   The system awards maximum value to a student if the points cap is reached fro 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.

  e. 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 bess than or equal to the value entered in the Max Points Per Activity field.

  f. Select one or more staff members from the Co-ordinators list.

  g. Select an option from the Specialty Groups list to specify staff responsible for the activity. For example, music or coaching staff.

11. Select **🖫 Save** .

Add a category group

Overview

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.

Steps

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

   The Activity Categories screen displays.

4. Select **✎ Edit** next to a category.

   The Edit Categories screen displays.

5. Under Groups in [category name], enter a name for the new category group and select **+ Add** .

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6. Select **Rename** next to the group to update the group.

7. Select **Remove** next to the group to remove it, and then select **Confirm**.

Edit, remove, or re-order a category

To edit a category

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

   The Activity Categories screen displays.

4. Select **Edit** next to a category.

5. In the Edit Category screen, update information.

6. Select **Save**.

To remove a category

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

   The Activity Categories screen displays.

4. Select **Remove** next to a category.

5. Select **Confirm**.

To re-order activity categories

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

   The Activity Categories screen displays.

4. Use the drag handles icon ≡ to move the position of a category in the list.

Rename or remove a group within a category

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

   The Activity Categories screen displays.

4. Select the category containing the group. Alternatively, select **✏ Edit** next to the Category.

The Edit Categories screen displays.

5. Do any of the following:

a. Select **✏ Rename** next to the group and update the name of the group.

b. Select **🗑 Remove** next to the group, and then select **Confirm**.

Display excursion categories on the home screen

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Categories**.

The Activity Categories screen displays.

4. In the **Excursion Categories to be displayed on Home Tile** section, select up to three excursion categories from the list.

5. 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.

Add a new venue group

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Venues**.

    The Venue Groups screen displays.

4. Select **New Venue Group**.

5. Enter a name for the venue group and select **Add**.

    The venue group is added to the list – displayed in alphabetical order.

Add a venue to a venue group

1. Select the menu icon ⣿ and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Venues**.

    The Venue Groups screen displays.

4. Select **Edit** next to a Venue Group.

5. Under Venues in [venue group], enter a name for the new venue, and then select **Add**.

6. Select **Edit Address** next to a venue.

   a. Enter address details.

   b. Enter a Map URL.

   c. Select **Save**

Import venue information
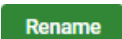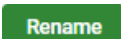
1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Venues**.

   The Venue Groups screen displays.

4. Select **Edit** next to a Venue Group.

5. Under Venues in [venue group], select **Choose file**, select the file to upload, and then select **Import Venue Data** .

Export venue information

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Venues**.

   The Venue Groups screen displays.

4. Select **Edit** next to a Venue Group.

5. Under Venues in [venue group], select **Export Venue Data** .

   The data is exported to a CSV file.

Edit venue information

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Venues**.

   The Venue Groups screen displays.

4. Select **Edit** next to a Venue Group.

5. Under Venues in [venue group], do any of the following:

   a. Select Edit address **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.

Edit a built-in cycle

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Cycles**.

4. Under Built-In Cycles, do one of the following:

   - Select **Edit** next to the cycle.
   - Select the link in the Periods column.

5. Under Edit Cycle, do any of the following:

   - Update the name of the cycle.
   - Select an option from the Active Instance list.

6. Select **Save**

7. Under Periods in [cycle name], select **Rename**, enter a new period name, and then select **Rename** .

8. Under Cycle Instances, select **Edit** next to an instance.

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

9. Select **Save**

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Add a new custom cycle

1. Select the menu icon ⦂⦂⦂ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Cycles**.

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

5. (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 .

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

7. 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

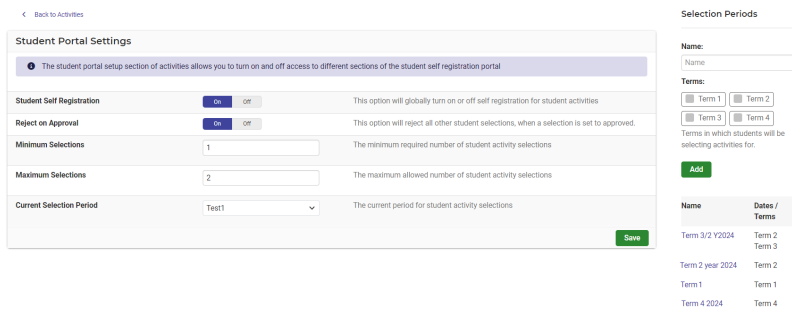## Overview

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
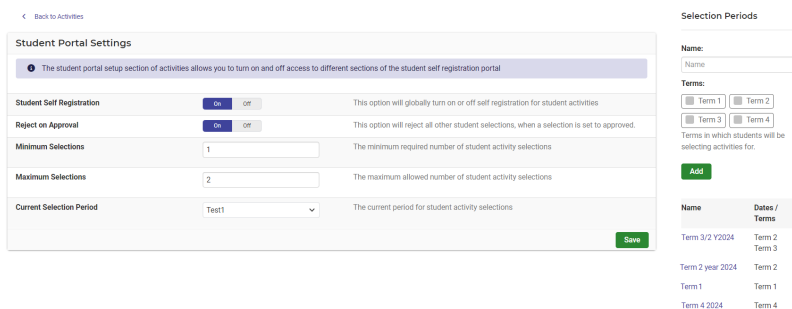- specify the time period in which selections can be made.

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

Turn on self-registration

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Student Portal**.

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

5. Select **Save**

Define access for student self registration portal

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

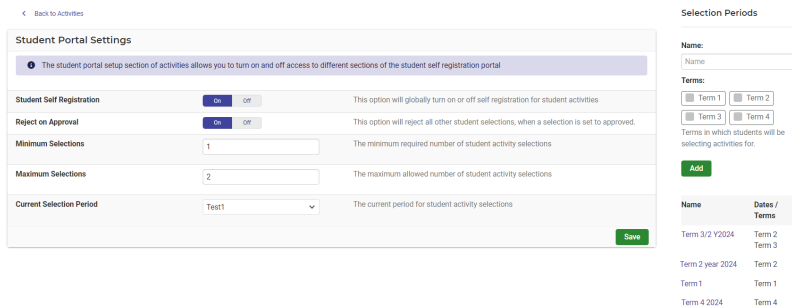3. Select Setup in the left menu and choose **Student Portal**.

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4. In Student Portal Settings, select **On** next to Student Self Registration:

    a. Specify whether to reject on approval

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

    c. Select the current selection period from the list.

5. Select Save .

Add selection periods for student portal settings

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Student Portal**.

4. 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, and then 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** and **Activities Setup | Create a Risk Assessment Template**

View template content

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

Add a new custom template

1. Select the menu icon and choose Activities.
2. Select Setup and choose **Activities Setup**.
3. Select Setup in the left menu and choose **Approval/Risk Assessment**.
4. Do one of the following:

   a. Under Approval Templates, enter a name for the template and select **Add New Template**.

   b. Under Risk Assessment Templates, enter a name for the template and select **Add New Template**.

   A blank template is created – ready for you to add content.

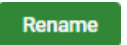5. To add sections and fields, select **Edit** next to the template.

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

7. Save your changes.

Create a new template (copy and edit)

Part 1 – Copy and rename existing template

1. Select the menu icon ⣿ and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

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

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.

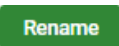   ii. Use the drag handles ☰ next to the section header to change its position.

    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 **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 **Rename** 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.

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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

Overview

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.

> **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**
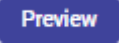
Create a new letter template for activities

1. Select the menu icon ⠿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Letter Templates**.

4. Select **New Letter Template**.

5. 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.

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

7. 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.

8. Select **Save**.

Edit an existing letter template for activities

1. Select the menu icon ⋮⋮⋮ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Letter Templates**.

4. Select **Edit** next to a template.

5. 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.

6. Select **Preview** to check content and formatting.

7. Select **Save**.

Remove a template

1. Select the menu icon ⋮⋮⋮ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Letter Templates**.

4. Select **Remove** next to a template.

5. Select **OK** to confirm.

Configure absence reasons

Overview

Use this section to specify the absence reasons available for selection when teachers mark the roll for activities.
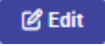
There are three inbuilt absence reasons available:

- 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.
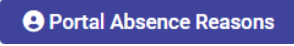
Edit an absence reason

1. Select the menu icon ⁙ and choose Activities.
2. Select ⚙ Setup and choose **Activities Setup**.
3. Select Setup in the left menu and choose **Absence Reasons**.
4. Select 🖉 Edit next to an absence reason.
5. Select a linked attendance reason from the list.
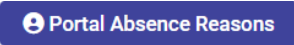6. Select Save .

Add an absence reason

1. Select the menu icon ⁙ and choose Activities.
2. Select ⚙ Setup and choose **Activities Setup**.
3. Select Setup in the left menu and choose **Absence Reasons**.
4. Select + Add Reason .
5. 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 .

Add a portal absence reason

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

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Absence Reasons**.

4. Select **Portal Absence Reasons** next to an absence reason.

5. In Editing Portal Absence Reasons:

    a. Select **Add Reason** .

        Additional fields display.

    b. Enter a description and a shorthand description (abbreviation).

    c. Select **Save** .

    The reason is listed next to the absence reason in the Portal Reasons column.

Edit or remove a portal absence reason

1. Select the menu icon ⣿ and choose Activities.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Absence Reasons**.

4. Select **Portal Absence Reasons** next to an absence reason.

5. 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** .

SENTRAL

Configure settings

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.

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

Activities Setup | Settings within Activities
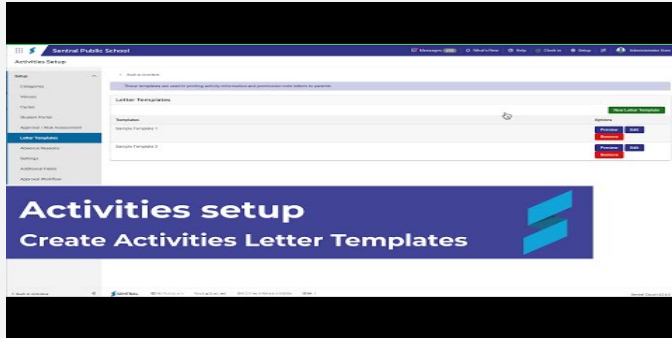
1. Select the menu icon and choose **Activities**.

2. Select Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Settings.**

4. **Configure Settings section.**

Settings		
Activity points	Show / Hide	This option determines if the points are used and should be shown in activities.
Enforce Category points limit	Yes / No	This option determines if point caps can be enforced within categories.
Show Risk Assessment Forms	Show / Hide	This option determines if the risk assessment forms should be shown in activities.
Show Approval Forms	Show / Hide	This option determines if the approval forms should be shown in activities.
Show Categories Sections	Show / Hide	This option determines if sections should be shown as an extra hierarchy level above categories.
Student Selections Cap	Hard / Soft	This setting will control whether the activities pushed to portal for selections with limited student slots are hard capped or soft capped.
Show Sports Dashboard	Yes / No	This setting will control whether the activities would have a Sports or a regular dashboard in the tenant.
Show Music Dashboard	Yes / No	This setting will control whether the activities would have a Music or a regular dashboard in the tenant.

a. Review the descriptions for each setting to understand what each option controls. Specify the options to suit your school's situation.

b. Specify if point caps can be enforced within categories.

c. Specify if risk assessment forms should be shown in activities.

d. Specify if approval forms should be shown in activities.

e. Specify if category sections should be shown as an extra hierarchy level above categories.

f. Choose how to control the student selections cap - whether the activities pushed to portal for selections with limited student slots are hard capped or soft capped.

g. Specify if activities would have a Sports or a regular dashboard.

h. Specify if activities would have a Music or a regular dashboard.

i. If you're finished configuring all settings, select **Save** .

5. **Configure Activity roll settings.**

Activity Roll Settings		
Create attendance absence on activities roll submit	Yes / No	This option determines if an absence should automatically be created when an activity roll is submittted.
Select which absence reason should be shown when the student is present for the activity roll	--none--	The selected reason will be used to in creating an absence in Attendance when submitting an Activity Roll.
Default Transport Roll Attendance Status	Present	The selected status will be used to in creating Attendances when a Transport roll is created.

a. Under Activity Roll Settings, review the descriptions for each setting to understand what it controls. Specify the options to suit your school's situation.

b. Specify if an absence should automatically be created or updated when an activity roll is submittted.

c. Select which absence reason should be shown when the student is present for the activity roll.

This is used to create an absence in Attendance when submitting an Activity Roll.

d. Specify the default transport roll attendance status.

This is used to create Attendances when a Transport roll is created.

e. If you're finished configuring all settings, select **Save** .

SENTRAL

6. **Configure default print activity roll settings.**

Default Print Activity Roll Settings		
Show student IDs	Show Hide	This option will turn on/off student ids option by default when printing activity rolls.
Show parent contact details	Show Hide	This option will turn on/off parent contact details option by default when printing activity rolls.
Show medical alert	Show Hide	This option will turn on/off medical alert option by default when printing activity rolls.
Show activity flags	Choose a value...	This option will determine which activity flags will get displayed on activity rolls. If you leave it blank then no flags will be shown.
Show student flags	Choose a value...	This option will determine which student flags will get displayed on activity rolls. If you leave it blank then no flags will be shown.

a. Under Default Print Activity Roll Settings, review the descriptions for each setting to understand what it controls. Specify the options to suit your school's situation.

b. Specify whether to show or hide student IDs by default when printing activity rolls.

c. Specify whether to show or hide parent contact details by default when printing activity rolls.

d. Specify whether to show or hide medical alerts by default when printing activity rolls.

e. Select the activity flags to show on activity rolls.

   If you leave it blank then no flags are shown.

f. Select the student flags to show on activity rolls.

   If you leave it blank then no flags are shown.

g. If you're finished configuring all settings, select **Save**.

7. **Configure default activity settings for excursions.**

Default Activity Settings: Excursions	
Show in Reports:	No Yes
Is SDL (Student Directed Learning):	No Yes
Show in Attendance:	No Yes
Limit Places:	No Yes
Requires Approval / Risk Assessment:	No Yes
Enable Cost Subsidy:	No Yes

a. Specify whether to show Excursions in Reports by default.

b. Specify if excursions are student directed learning by default.

c. Specify whether to show excursions in Attendance by default.

d. Specify whether to limit places for excursions by default. If you select **Yes**, then also specify the maximum places.

e. Specify whether excursions require approval and risk assessment by default.

f. If you're finished configuring all settings, select **Save**.

8. **Configure Publish to Portal settings.**

Publish To Portal Settings	
Should invoices be created for parents when an activity is published to portal?	No Yes

a. Under Publish to Portal Settings, specify whether to create invoices for parents when an activity is published to the portal.

b. If you're finished configuring all settings, select **Save**.

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9. **Configure default activity settings for sports.**

   a. Under Default Activity Settings, review the descriptions for each setting to understand what it controls.

   b. Specify whether to disable co-curricular activities by default.

      This setting controls whether any sports, music and co curricular activities are displayed in Activities.

   c. Specify with to enable conflict resolution for sport cohort conflicts by default.

   d. Select the Post Game Teams Reset checkbox if you want to control when teams should be reset. If you select this checkbox, then also choose a time and select **Set Time**.

   e. Select [Save].

SENTRAL

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
>
>
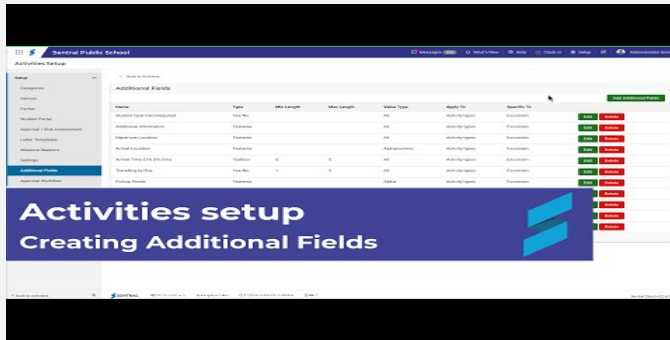
Add additional fields

1. Select the menu icon and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Additional fields**

4. Select **Add Additional Fields**.

5. In Add Additional Field:

   a. Enter a name for the field.

   b. Specify details such as the type of field, as well as its minimum and maximum length.

   c. Specify the values the field accepts.

   d. Choose whether to apply the field to:

      i. Categories – and then select one or more specific categories.

      ii. Activity types – and then select one or more specific activity types.

      iii. Activity attendees.

   e. Select **Save**.

Edit additional fields

1. Select the menu icon and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Additional fields**

4. Select **Edit** next to a field.

5. In Edit Additional Field, update any of the settings and select **Save**.

Delete additional fields

1. Select the menu icon and choose **Activities**.

2. Select Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Additional fields**

4. Select **Delete** next to a field.

5. Select **OK** to confirm.
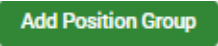
SENTRAL

Configure Positions register

Overview

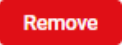Use the information in this section to add various sports to the register and nominate the positions played within the sport. For example, Football – defender, goal keepers, mid fielder.

> **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**.

2. Select Setup and choose **Activities Setup**.

3. Select Setup in the left menu and choose **Positions Register**.

4. Select **Add Position Group** .

5. Enter a name for the Position Group and select **Add** .

   The Position Group is added to the list – ready for you to add positions.

6. Select **Edit** next to the position.

7. 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**.

2. Select Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Positions Register**

   The Position Groups screen displays.

4. Select **Edit** next to a position group.

5. Do any of the following:

   a. Update the name of the position group and select **Save** .

   b. Select Remove next to a position group and select **Confirm** .

To edit or remove a position

1. Select the menu icon and choose **Activities**.

2. Select Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Positions Register**

   The Position Groups screen displays.

4. Select **Edit** next to a position group.

5. Do any of the following:

   - To rename a position, select **Rename** next to a position and then select **Save** .

   - To remove a position, select **Remove** next to a position.

Configure approval workflow

Overview

Use the information in this section to configure the module to reflect 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.

> **(i)** **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.

Add a new approval workflow

1. Select the menu icon ⣿ and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Approval Workflow**.

4. In Approval Workflows, select ![New Approval Workflow].

The Approval Workflow screen displays.

5. Enter a name and description for the workflow.

6. Specify if the **Editing during approval** setting should be enabled.

   - You can switch on this setting to allow users to make changes to an activity while the approval process is still running.

   - If this option is switched off, users cannot make changes unless the activity is rejected or more information is requested by an approver. The system will still allow users to change some minor details (for example, changing organisers, due date and some other flags such as report, calendar) that do not have an impact on core activity details (for example, venue, description, dates, cost).

7. Select ![Add Approval Workflow Step].

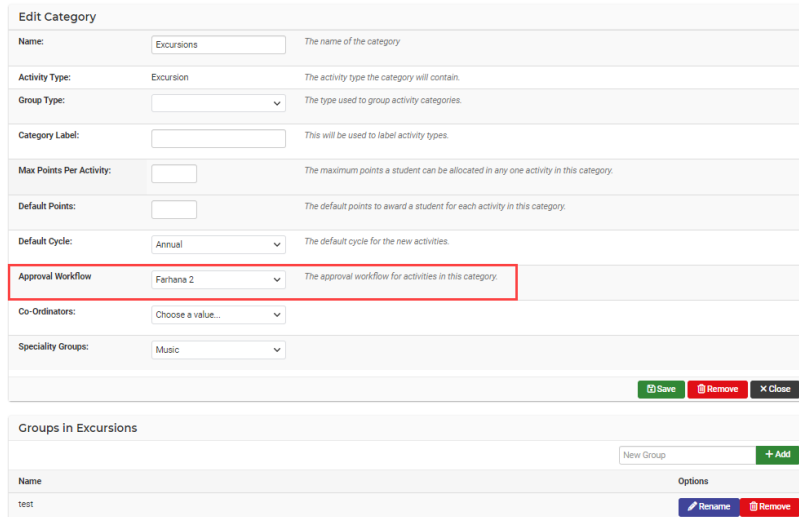You only need to create approval steps tied to the approval process. The first and the last steps of the activity approval workflow are always automatically created as 'Proposed' and 'Ready to Publish once you save a newly created workflow. You can edit these step names, but you cannot assign approvers to them. You also cannot change the order of these steps. This is because these steps do not require an approval.

![SENTRAL]

8. In Adding approval step:

    a. Enter a name and description for the approval step.

    b. Specify visibility and approver options on the Details tab.

    c. Assign approvers for the step in the Approvers tab.

      You can allocate approvers for each step and outline (in the Description section) what needs to be checked during each approval step.

    d. Only assigned approvers or school administrators are allowed to approve or reject an approval step. If an approval step is assigned to 'Anyone', only users with permission to approve an activity or school administrators can approve or reject an activity.

      You can manage permission settings from the Sentral Setup section.

      i. Select ⚙ **Setup** and choose **Manage User Accounts**.

      ii. Select Manage User Permissions in the left menu.

      iii. Under Manage User Permissions, next to Modify Access Levels, choose **Activities** from the list.

      iv. Under Approval Workflows, choose options.

    e. Select **Add to workflow** .
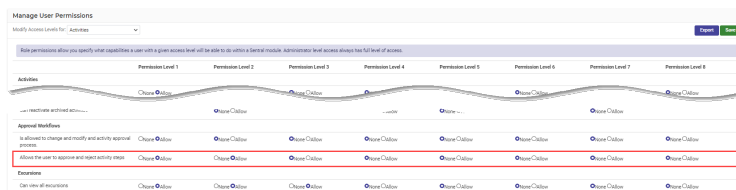
      The approval step is added to the approval workflow.

9. Add more approval workflow steps as needed, and then select **Save** .

> ⚠️ **Warning:** If an approval step is assigned to 'Anyone', only school administrators or users with permission to approve an activity can approve or reject an activity.

Link a new approval workflow to a category

You can link created workflows to an existing activity category (for example, excursion).

1. Select the menu icon ⁞⁞⁞ and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.
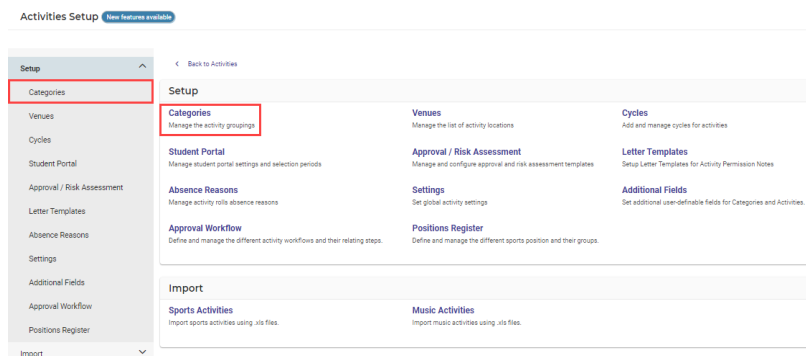
3. Under Setup in the left menu, choose **Categories**.

4. Select **✎ Edit** next to one of the categories listed.

The Edit Category screen displays.
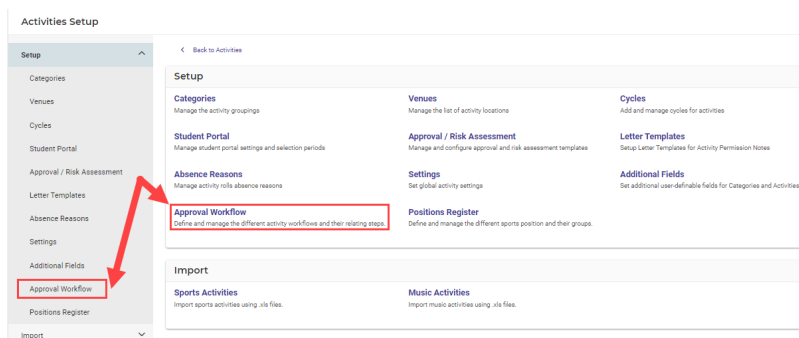

5. Next to Approval Workflow, select the newly created approval workflow from the list.

6. Select **Save**.

Edit an approval workflow

1. Select the menu icon ⠿ and choose **Activities**.

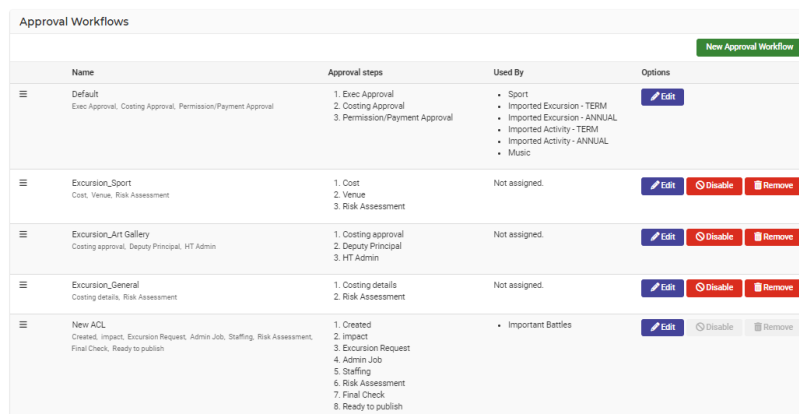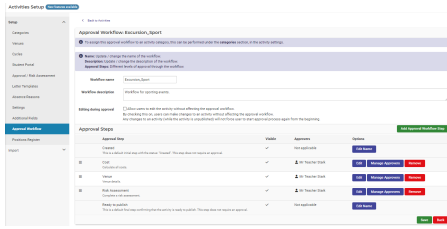2. Select ⚙ Setup and choose **Activities Setup**.

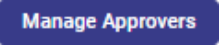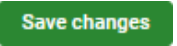3. Under Setup in the left menu, choose **Approval Workflow**.

4. 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.
5. Select **✎ Edit** next to an approval workflow.

6. 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.
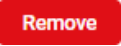   iv. Select **Save**.

    c. Add an approval workflow step.

        i. Select **Add Approval Workflow Step**.
        ii. Enter a name and description for the step and select **Add to workflow**.

    d. Manage approvers for an approval step.

        i. Select **Manage Approvers** next to the step.
        ii. Select the groups and user to assign to the step.
        iii. Select **Save changes**.

        > 💡 **Tip:** You must assign Approvers according to their current role in the school's process.
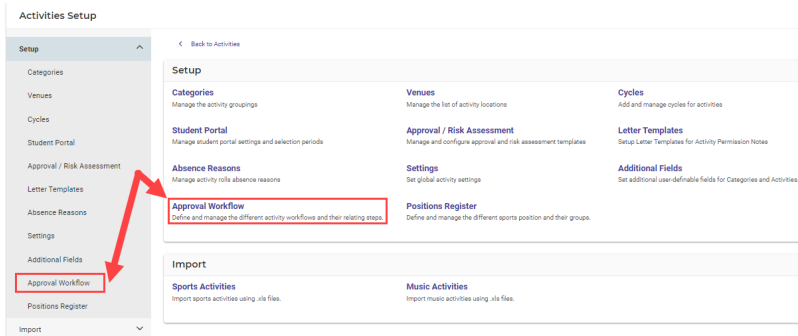
    e. Re-order approval steps.

        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**.

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**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Approval Workflow**.

4. Check the Used By column.

   - 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.

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

5. 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 🗑 Remove and then select Confirm .

      The approval workflow is removed from the list of workflows.

Import activities

> **Tip:** We encourage schools to discuss how to use the Imports function with your Implementation Manager.

Import sports activities

> **Note:** This feature is available to some independent schools.
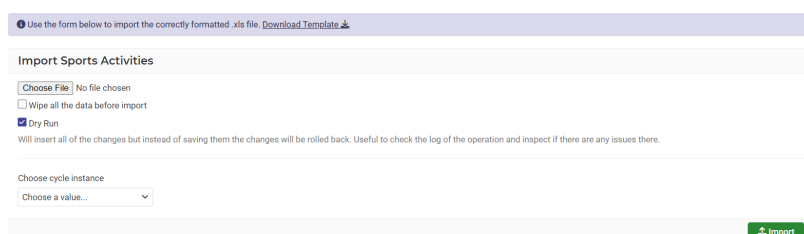
Overview

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

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**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Import in the left menu, choose **Sports Activities**.

4. Select the **Download Template** link at the top of the screen.

Import file

1. Select the menu icon ⣿ and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Import in the left menu, choose **Sports Activities**.

4. Select Choose File and select the correctly formatted Excel file.

5. Select one of the following options:

   a. Wipe all the data before import

      This option wipes all co-curricular type activity data before imprinting. It does not affect standard activities.

   b. Dry Run.

6. Select a cycle instance for the import.

   This is only applicable to schools using co-curricular activities such as Saturday sport.

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7. Select ⬆ Import .

An import log displays the imported files.

Import music activities

ℹ **Note:** This feature is available to some independent schools.
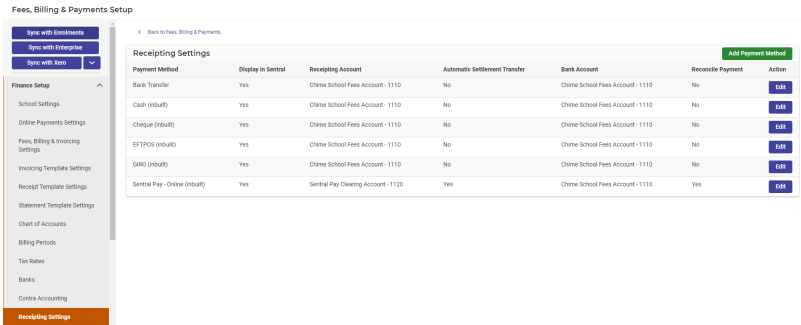
Overview

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

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**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Import in the left menu, choose **Music Activities** .

4. Select the **Download Template** link at the top of the screen.

Import file

1. Select the menu icon ⠿ and choose **Activities**.

2. Select ⚙ Setup and choose **Activities Setup**.

3. Under Setup in the left menu, choose **Music Activities**.

4. Select **Choose File** and select the correctly formatted Excel file.

5. Select one of the following options:

   a. Wipe all the data before import

      This option wipes all co-curricular type activity data before imprinting. It does not affect standard activities.
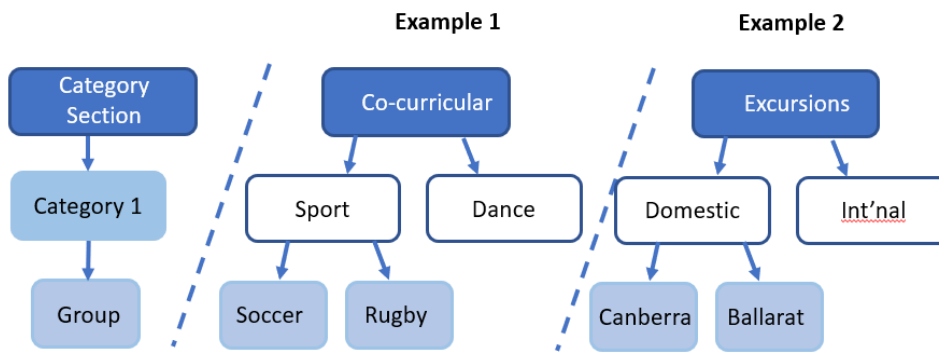
   b. Dry Run.

6. Select a cycle instance for the import.

   This is only applicable to schools using co-curricular activities.

7. Select ⬆ Import .

An import log displays the imported files.

.

Categories – Examples

Category section, Category and Group information displays on the home screen.