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1 Introduction

This document describes key steps for successfully setting up Sentral Documents. This document describes the default setting for all new school documents management.

A detailed description for the setup of each area in Documents has been provided as well as a **checklist** of **pre-requisites**, **considerations** and **decisions** and recurring tasks that need to be reviewed on a periodic basis.

2 Considerations, Dependencies and Pre-Requisites

This section highlights the key areas that the school administration staff need to consider prior to setting up the Sentral Document module.

2.1 Staff Access

For the Documents to operate and be useful, you must have user accounts created for staff members at the school. Permissions need be revised in the Enterprise Setup to ensure the correct staff have access to setup this module.

| Manage User Permissions | | | | | | | | |
|---|---|---|---|---|---|---|---|---|
| Modify Access Levels for: Student Plans Save | | | | | | | | |
| Role permissions allow you specify what capabilities a user with a given access level will be able to do within a Sentral module. Administrator level access always has full level of access. | | | | | | | | |
| | Permission Level 1 | Permission Level 2 | Permission Level 3 | Permission Level 4 | Permission Level 5 | Permission Level 6 | Permission Level 7 | Permission Level 8 |
| Setup | | | | | | | | |
| Can Manage Common Setup | <input checked="" type="radio"/> None <input type="radio"/> Allow | <input type="radio"/> None <input checked="" type="radio"/> Allow |
| Can Access Setup - Additional Information | <input checked="" type="radio"/> None <input type="radio"/> Allow |
| Can Access Setup - Plan Types | <input checked="" type="radio"/> None <input type="radio"/> Allow |
| Student Plans | | | | | | | | |
| Can Access Confidential Plans | <input checked="" type="radio"/> None <input type="radio"/> Allow | <input type="radio"/> None <input checked="" type="radio"/> Allow | <input type="radio"/> None <input checked="" type="radio"/> Allow | <input type="radio"/> None <input checked="" type="radio"/> Allow |
| Can Access Plans | <input checked="" type="radio"/> None <input type="radio"/> Allow |
| Can Create Plans | <input checked="" type="radio"/> None <input type="radio"/> Allow | <input type="radio"/> None <input checked="" type="radio"/> Allow |
| Can Edit Other Users Plans | <input checked="" type="radio"/> None <input type="radio"/> Allow | <input checked="" type="radio"/> None <input type="radio"/> Allow | <input checked="" type="radio"/> None <input type="radio"/> Allow | <input type="radio"/> None <input checked="" type="radio"/> Allow |
| Can Remove Plans | <input checked="" type="radio"/> None <input type="radio"/> Allow |

2.2 School vs Portal Document

The school need to determine which documents will be visible via the portal and those only visible to staff. These then need to be monitored regularly, updated, and deleted as required.

2.3 Roles and Responsibilities Setup

Administration of the Documents module is usually assigned to a select group of staff with access to all the functionality in the module. As such, the school will be responsible for applying access levels for staff which will determine what actions they can perform in the module.

3 Setup Documents

The following is a description of the setup for each area in the Documents. Settings that are not explained in this guide can be configured without explanation or configured later. The configurations can be found via **School Documents > Setup Documents**.

3.1 Application Options

The Administrators/Executive can setup the Documents application.

Schools can define the maximum size of a file, the grace period for items in the recycle bin for both school and portal documents.

| Option | Value | Description |
|---|---------|--|
| Maximum File Size | 5 MB | Defines the maximum allowed file size (from 1 to 100) |
| School Documents Recycle Bin Grace Period | 30 days | The number of days until deleted school documents are permanently deleted. |
| User Documents Recycle Bin Grace Period | 30 days | The number of days until deleted user documents are permanently deleted. |
| Portal Documents Recycle Bin Grace Period | 30 days | The number of days until deleted portal documents are permanently deleted. |

3.2 Modify Access

Click on **Modify Access** to modify user access. This will take you to the Manage Roles screen in Sentral Setup.

1. To create a role, click on the **New Role** button.
2. Select **Edit** to assign staff to these roles you have created.

Add New Role
✕

Name

The name of the role.

Users

▼

The list of users in this role.

Save
Cancel

Scroll through the drop-down list and Add User to the roles.

Appendix A: Summary Checklist

So, you've scanned the detailed document and are wondering what's next? This table gives you a road map in concise, easy to read steps of how to get your Document module up and running in no time.

| MODULE | CHECKLIST | REVIEW FREQUENCY |
|----------------------------|------------------|------------------------------|
| <i>Application Options</i> | Size of files | On an annual basis - January |
| <i>Modify Access</i> | User access | Regular basis |