

Documents Admin Guide

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Contents

Getting started	3
Overview	3
Considerations, dependencies and prerequisites	3
Staff access	3
School vs Portal document	3
Roles and responsibilities setup	3
Manage user permissions for documents	4
Overview	4
Activity documents	4
Configure document options	5
Overview	5
Steps	5
Summary checklist	6

Manage user permissions for documents

Overview


Use the information in this topic to manage user permissions and modify access levels for the Documents module.

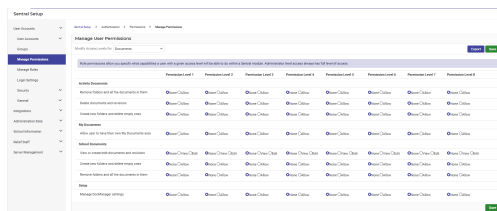
Role permissions allow you specify what capabilities a user with a given access level will be able to do.

Activity documents

Each activity/excursion created within the Activities module creates a new sub-folder within the Documents module. Attachments uploaded to an activity or excursion are visible within the Documents module.

To set role permissions for Activity documents:

1. Select  Setup and choose **Manage User Roles**.
2. Select **Manage Permissions** in the left menu.
3. Next to **Modify Access Levels for**, select **Documents** from the list.



4. Under **Activity Documents**, for each role, set permissions to **None** or **Allow** for the following capabilities:
 - a. Remove folders and all the documents in them
 - b. Delete documents and revisions
 - c. Create new folders and delete empty ones.
5. Under **My Documents**, for each role, set permissions to **None** or **Allow** for the following capability:
 - Allow user to have their own My Documents area
6. Under **School Documents**, for each role, set permissions to **None** or **Allow** for the following capability:
 - View or create/edit documents and revisions
 - Create new folders and delete empty ones
 - Remove folders and all the documents in them.
7. Under **Setup**, for each role, set permissions to **None** or **Allow** for the following capability:
 - Manage DocManager settings.



Tip: DocManager is the Documents module.


8. Select **Save**.

Configure document options


Overview

Your Sentral Administrator can set up the Documents module. Based on your leadership team's preferences, they can define the maximum size of a file, as well as the grace period for items in the recycle bin for both school and portal documents.

Steps

1. Select the Sentral menu icon  and choose **Documents** in the Communication group.

The Documents home screen displays.

2. Select  Setup and choose **Documents Setup**.

Documents Setup

[Back to Documents](#)

Option	Value	Description
Maximum File Size	20 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.
Activity Documents Recycle Bin Grace Period	days	The number of days until deleted activity documents are permanently deleted.

[Save](#)

3. Set the maximum file size allowed.
4. Set the grace period for school documents in the recycle bin.
5. Set the grace period for user documents in the recycle bin.
6. Set the grace period for portal documents in the recycle bin.
7. Set the grace period for school documents in the recycle bin.
8. Select **Save**.

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
Application options	Size of files	On an annual basis - January
Modify access	User access	Regular basis