Documents User Guide

Contents

Document Overview

## Target Audience

- All staff

Content

- School and My documents
- Portal document
- Online Forms (Portal Console)

Overview

Staff will learn how to use the documents modules to upload with staff and share document with parents via the portal.

School Documents

Any documents here will be visible to any Sentral users with access to the Documents module. Do not use this area for storing documents containing information that has sensitive or contains personally identifying information that all school personnel (including potential relief staff and contractors) are authorised to access.
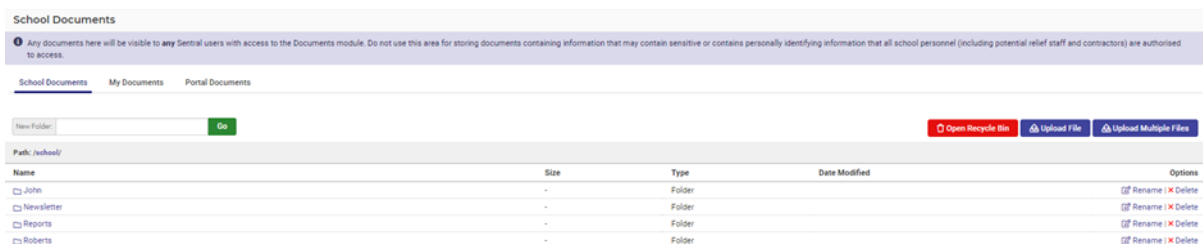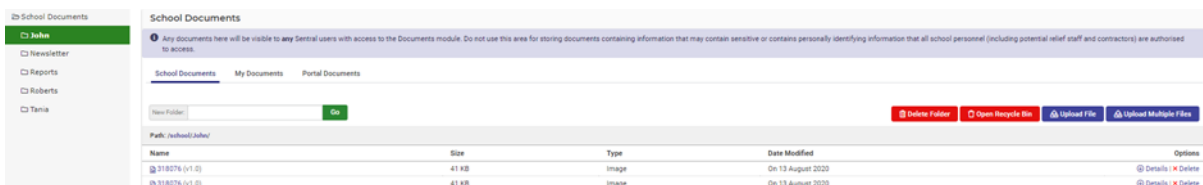

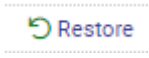Best practice would be to create folders for filing documentation accordingly.

1. Go to the search field and type the name of your folder

2. Click **Go** to save.
3. Sub folders can also be created within these folders.

4. These can then be renamed or deleted.
5. In order to delete a folder, all files within the folder must be deleted first.
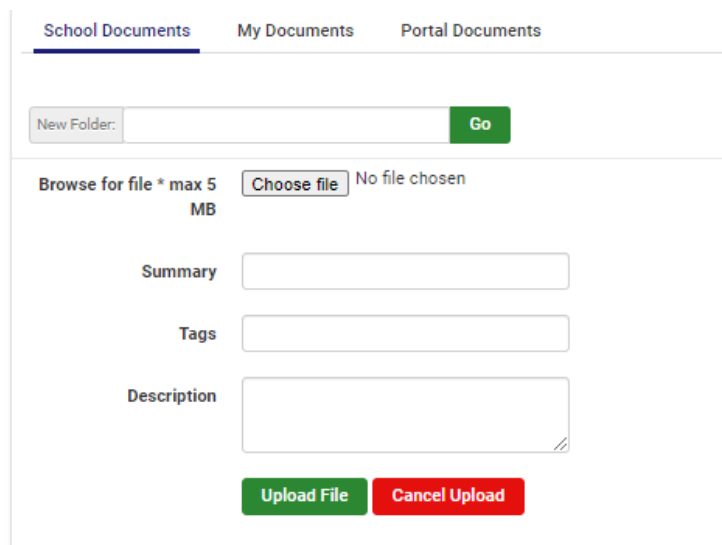
6. To retrieve deleted files, go to **🗑 Open Recycle Bin**

7. Select the items to **↺ Restore**

8. Once Folders have been created, staff can then upload documents (Image, word or CSV) into folders or to the general page.

Upload File

Summary: Name of the document.

Tags: Relevant tags associated with this document.

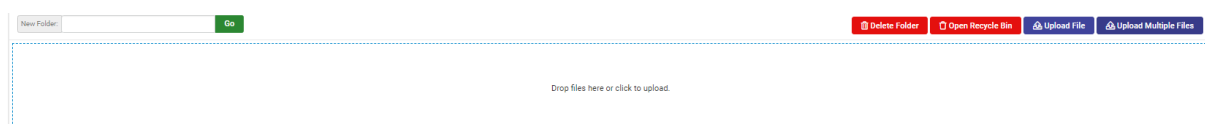**Description**: Detailed outline of the document or image.

1. **Upload File** and the file will display.

2. You are then given the option to view **Details**. ⊕ Details

3. This enables staff to apply version control and update to a new revision of this file with summary of changes.

Upload Multiple Files

Like individual files uploads however, you can add multiple samples or files in one go.

The items will automatically appear in the list below. No need to save.
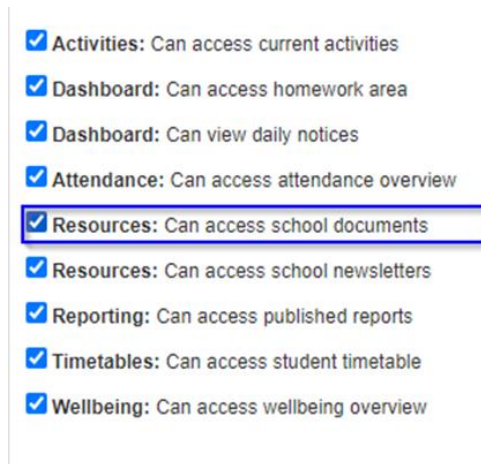
My Documents

Any document here is only visible to the individual user. The steps from School Document apply.

Portal Documents

To make Documents be visible to parents, it will need to be switched on in the setup of the Portal.

1. Go to **Portal Console Setup > Access Controls**.

Make sure **Can access school document** is switched on.

Follow the same steps you did for school documents.

The additional functionality here is;

1. **Portal Access Restrictions** – This is a yes/no option.

Date Range will only show the document within the dates provided

Current School Year will only show the document to the Portal user that is within that student year level.

Historical School Year will only show the document to the Portal user that was within that year level in a specified year.

Note: Documents with Date Range or Historical School Year permission restrictions will not display in Legacy Portal.

2. **Publish to Portal Feed** – sends parents a push notification.

Online Forms

Schools that are using the Portal Console will notice they can Upload and view portal documents.

From here you can view **Portal Documents & Upload Documents** and be redirected to the Documents Module.

The additional feature here is that schools can upload **Online Forms.**

Schools may wish to share forms with parents that are required to be downloaded, completed and returned via the Portal.

1. Click on **School Documents > Documents > Online Forms.**

2. A list of current forms will display.

3. The school can **Upload Form** and complete the details onscreen. **Add Title**, **Description** and **Form** all are mandatory fields. No push notification is sent to the parent, it simply publishes to the **Parent Portal**.

NOTE: Parents need to go to the **School Forms** Tab to download the form and then upload the completed form.

4. **View Form Submission** – documents/forms that have been uploaded by parents can be viewed by the school. They appear ion a pending state.

5. The school can click on **Review** which switches on **Approve/Reject** option for the school.

6. Click on the link for the received form to download.

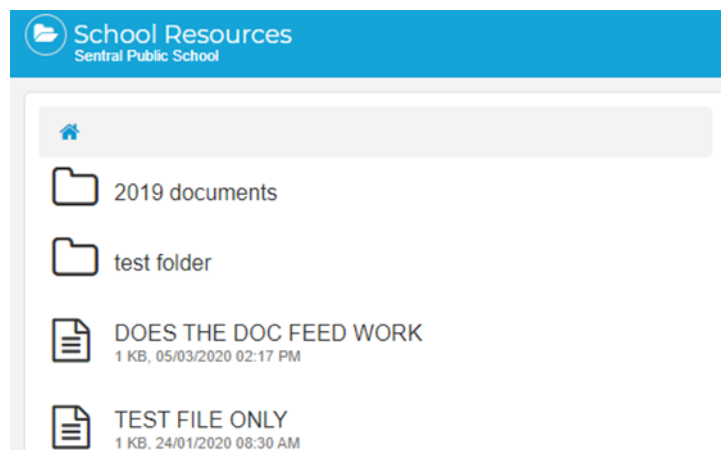7. The school can then save, print or file the form and Accept/Reject.

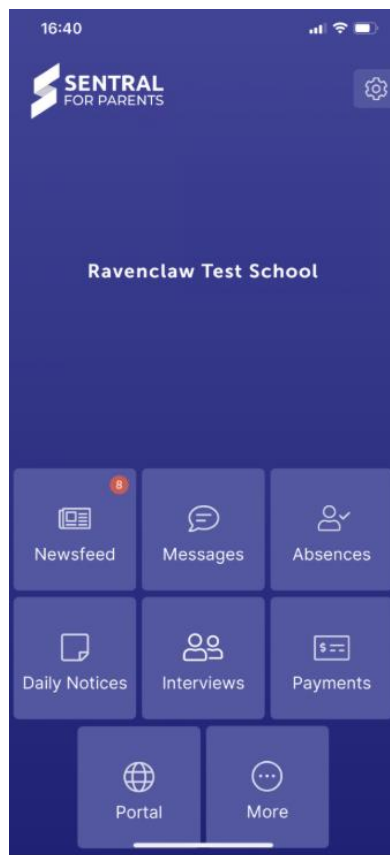8. If Accepted the Status is **Complete**. If **Rejected**, this will be noted on screen.

Parent View

When a parent signs into their Portal Account, they can go to School Resources to see documentation.
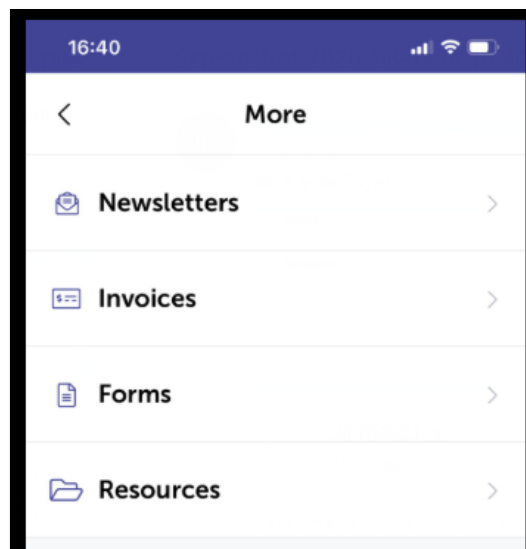
Folders can be clicked on to view the files.

Via the App the parent goes to **More** icon.

Select **Resources** to view the documents.

Glossary of Terms

Sentral software contains many drop-down lists and areas to add detail relevant to data entry for Documents. The list below provides further information on data entry fields. Each school can configure various elements and add to the list of data entry fields, so this is a default list of glossaries of terms.

Item	Description	Type
Publish to Portal Feed	Publish document to portal	Yes/No
Summary	Name of the document	text field
Tags	relevant tags associated with document	text field
Description	Detailed outline of the document or image	text field
Summary of Changes	the change in the document	text field
Maximum File Size	max size of the files	numeric
Recycle grace periods	number of days until document is permanently deleted	numeric
Date Range	will only show the document within the dates provided.	select from drop down
Current School Year	will only show the document to the Portal user that is within that student year level.	select from drop down
Historical School Year	will only show the document to the Portal user that was within that year level in a specified year.	select from drop down