

Documents User Guide

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Getting started

Target audience

- All staff

Content

The topics in this section cover:

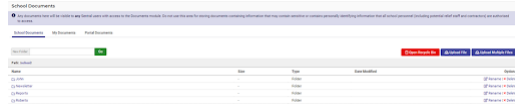
- School and My documents
- Portal document
- Online Forms (Portal Console).

About the Documents module

School Documents tab

The Documents module opens with the School Documents tab selected.

Documents on the School Documents screen are visible to any Sentral users with access to the Documents module.



Warning: Do not use this area for storing documents containing information that is sensitive or contains personally identifying information that all school personnel (including potential relief staff and contractors) are authorised to access.



Tip: Best practice would be to create folders for filing documentation by category.

My Documents tab

Documents displayed on the My Documents tab are only visible to the individual user.



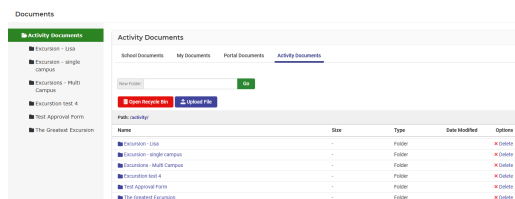
Tip: The steps from School Documents apply.

Portal Documents tab

Documents displayed on the Portal Documents tab are visible to parents if access controls in the Portal Console setup are configured to allow Portal users to view and download school resources.

Activity Documents tab


Attachments uploaded in the Activities module display in the Activity Documents tab within the Documents module.

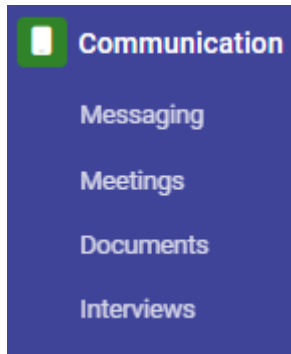


Manage folders

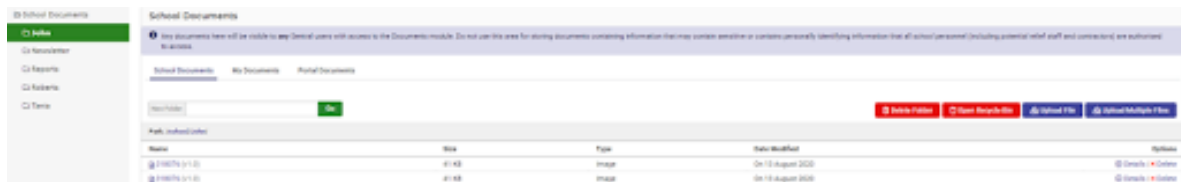
Create a new folder

Steps

1. Select the Sentral menu icon  and then select **Documents** under the Communication group.



The Documents home screen displays.



2. Type the name of your folder in the New Folder field and select **Go**.


New Folder:

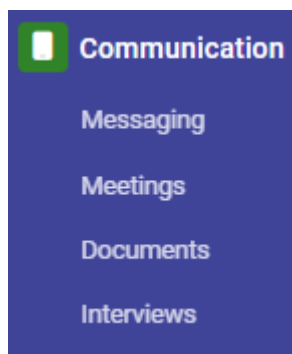
3. If required, create sub-folders within these folders.

Once folders have been created, you can upload documents (image, Word or CSV) into folders or to the home screen.

Rename or delete a folder

Steps

1. Select the Sentral menu icon  and then select **Documents** under the Communication group.






The Documents home screen displays.



2. Open the folder that you want to delete, and confirm that it does not contain any files.



Tip: To delete a folder, delete all files within the folder first.

3. Select  and select **OK** to confirm.
4. To retrieve deleted files:
5. Select 
6. Select items.
7. Select 

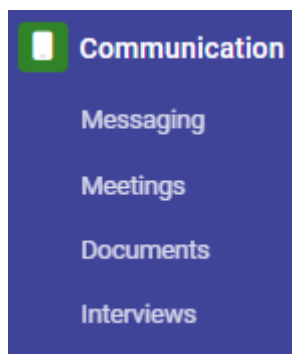
Upload a single file

Overview

Use the information in this topic to upload files to the Documents module.

Steps

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



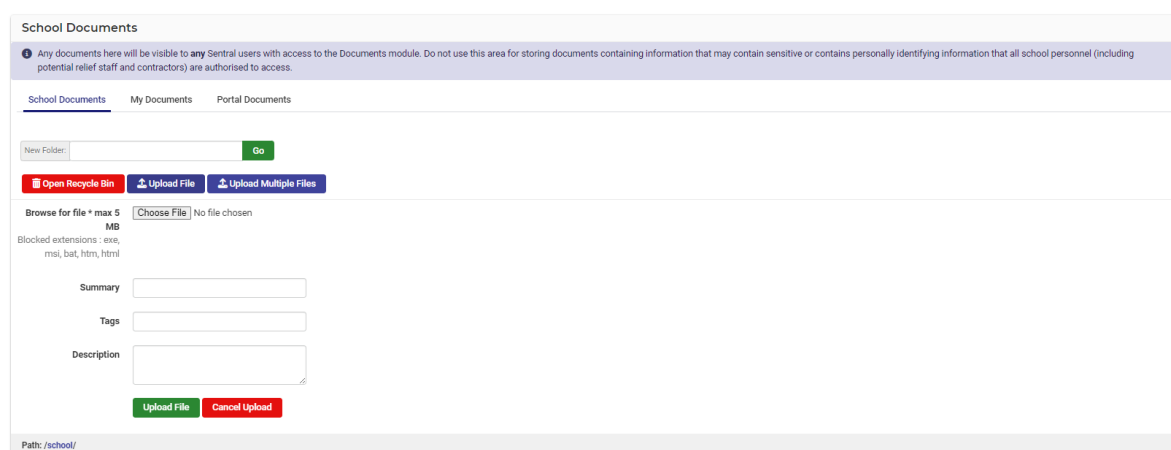
The Documents home screen displays.



2. Open the folder location where you want to upload a document.

3. Select 

Additional fields display.



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 may contain sensitive or contains personally identifying information that all school personnel (including potential relief staff and contractors) are authorised to access.

School Documents My Documents Portal Documents

New Folder:

Browse for file * max 5 MB
Blocked extensions: .exe, .msi, .bat, .html, .html

Choose File No file chosen

Summary

Tags

Description

Path: /school/

4. Select **Choose File** and browse to select the file.
5. Complete details for the document:
 - a. Summary: Name of the document.
 - b. Tags: Relevant tags associated with this document.
 - c. Description: Detailed outline of the document or image.

6. Select

Upload File


The file displays in the list.

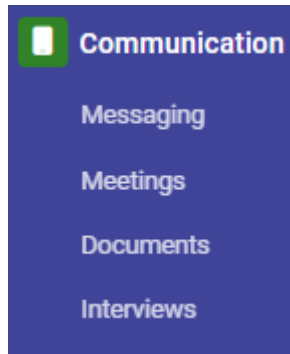
View file details for uploaded files

Overview

Use these steps to view the details for an uploaded file.


Steps

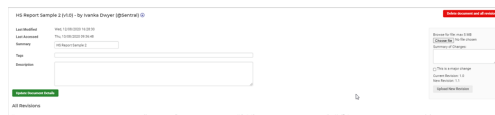
1. Select the Sentral menu icon  and then select **Documents** under the Communication group.



The Documents home screen displays.



2. Open the folder location of the file.
3. Select  **Details** next to the file.



4. Apply version control and update to a new revision of this file with summary of changes.



Work with Portal documents

Make Portal documents visible to parents



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

Steps

1. Select the Sentral menu icon  and then select **Portal Console** under the School Admin group.
2. Select the Setup icon  and choose **Portal Console Setup**.
3. Select **General** in the left menu and choose **Access Controls**.
4. Select to view access controls for **Parents**.
5. Make sure **View and download** school resources is switched on.


Manage Portal Access

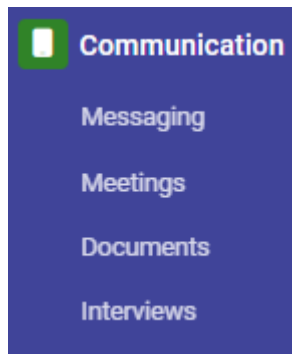
Portal Feature	<input type="radio"/> All off	<input type="radio"/> All view only	
Absences	<input type="radio"/> off	<input checked="" type="radio"/> View	
Academic Reports	<input type="radio"/> off	<input checked="" type="radio"/> View	<input type="checkbox"/> Download Published Reports <input type="checkbox"/> Mark and Comment Details <input type="checkbox"/> Self Assessment
Activity Participation	<input type="radio"/> off	<input type="radio"/> View	<input checked="" type="radio"/> Activity Selection
Conferences	<input checked="" type="radio"/> off	<input type="radio"/> View	
Continuous Assessment	<input type="radio"/> off	<input checked="" type="radio"/> View	<input type="radio"/> Data Entry
Continuums	<input checked="" type="radio"/> off	<input type="radio"/> View	
Daily Notices	<input type="radio"/> off	<input checked="" type="radio"/> View	
Forms	<input checked="" type="radio"/> off	<input type="radio"/> Download and submit	
Homework	<input checked="" type="radio"/> off	<input type="radio"/> View	
Links	<input type="radio"/> off	<input checked="" type="radio"/> View	
Markbook	<input checked="" type="radio"/> off	<input type="radio"/> View	
Messages	<input type="radio"/> off	<input checked="" type="radio"/> Read and respond to messages	<input type="radio"/> Start a conversation
NAPLAN	<input checked="" type="radio"/> off	<input type="radio"/> View	
Newsletters	<input type="radio"/> off	<input checked="" type="radio"/> View and download	
Plans	<input checked="" type="radio"/> off	<input type="radio"/> View	
School Resources	<input type="radio"/> off	<input checked="" type="radio"/> View and download	

6. Follow the same steps you used for school documents.

Upload files to Portal Documents


Steps

1. Select the Sentral menu icon  and then select **Documents** under the Communication group.

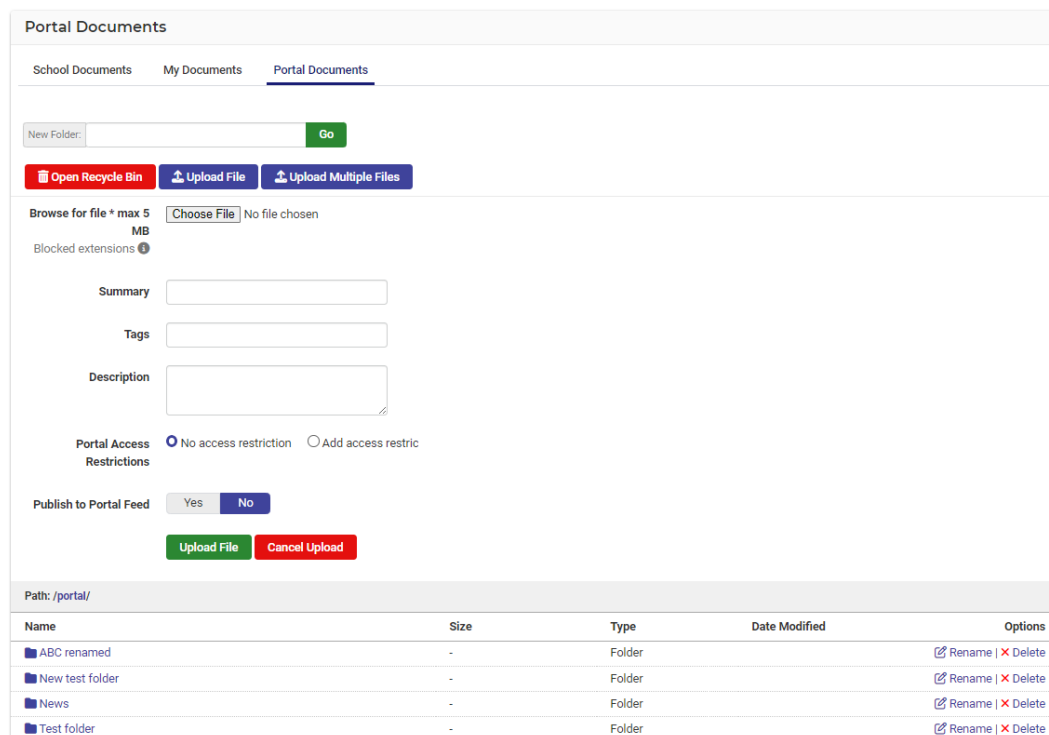


The Documents home screen displays.



2. Select the **Portal Documents** tab.
3. Open the folder location where you want to upload a document.
4. Select 

Additional fields display.



Name	Size	Type	Date Modified	Options
ABC renamed	-	Folder		Rename Delete
New test folder	-	Folder		Rename Delete
News	-	Folder		Rename Delete
Test folder	-	Folder		Rename Delete

5. Select **Choose File** and browse to select the file.

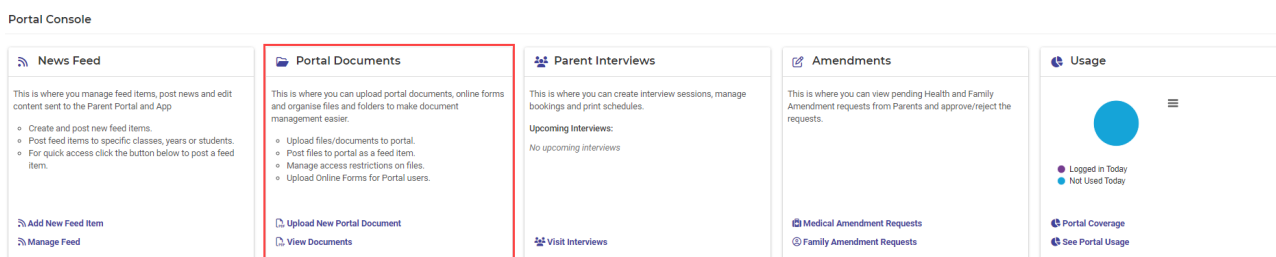
6. Complete details for the document:
 - a. Summary - name of the document.
 - b. Tags - relevant tags associated with this document.
 - c. Description - detailed outline of the document or image.
 - d. Portal Access Restrictions – select No access restriction or Add access restriction.
 - e. Publish to Portal Feed – sends parents a push notification.

7. Select **Upload File**

The file displays in the list.

View and upload documents from Portal Console

If your school is using the Portal Console module, you can upload and view Portal documents from the Portal Console.



Selecting **View documents** displays Portal Documents within the Portal Console - with the option to go to the Documents module.

Portal Documents				
Path: /portal/				
To manage your Portal Documents, click on the "Go to Documents" button.				
Name	Size	Years	Type	Date Modified
2019 documents	-	-	Folder	-
test folder	-	-	Folder	-
HIS Reports Sample (v1.0)	50 KB	All Years	PDF	On 28 November 2019
HIS Interim Report (v1.0)	167 KB	All Years	PDF	On 13 August 2020

Selecting **Upload New Portal Documents** redirects to the Documents module - with the Portal Documents tab selected.

Share online forms with parents

Overview

Your school may wish to share forms with parents that are required to be downloaded, completed and returned via the Portal. Use the information in this topic to upload forms from the portal console.

Steps

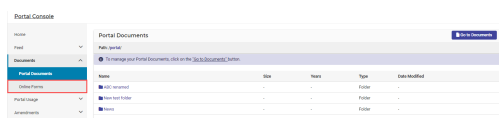
1. Select the Sentral menu icon  and then select **Portal Console** under the School Admin group.

The Portal Console home screen displays.

2. In the **Portal Documents** section, select **View Documents**.

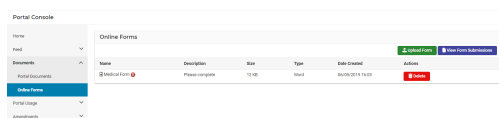
The Portal Documents screen displays - still within the Portal Console module.

3. Select **Online Forms** in the left menu.



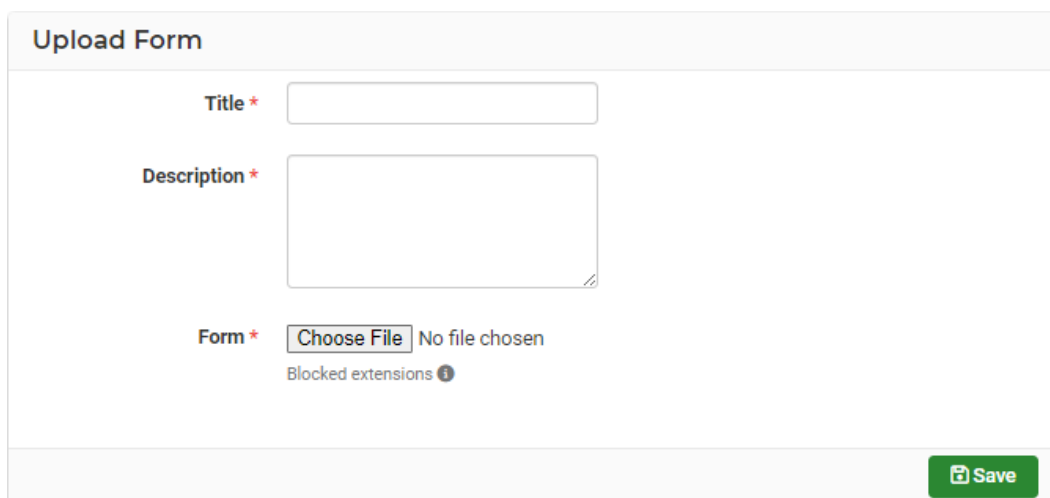
Name	Size	Views	Type	Date modified
101 - 101	-	-	Folder	-
101 - 101	-	-	Folder	-
101 - 101	-	-	Folder	-
101 - 101	-	-	Folder	-

The list of current forms displays.



Name	Description	Size	Type	Date modified
101 - 101	Please complete	10 KB	Form	10/10/2019 10:10

4. Select **Upload Form**



Upload Form

Title *

Description *

Form *

Choose File No file chosen

Blocked extensions ⓘ

Save

5. In Upload Form:

- a. Enter a title and description for the form.
- b. Select Choose File and browse to select the form that you want to upload.
- c. Select **Save**.

No push notification is sent to parents. It simply publishes to the parent portal.

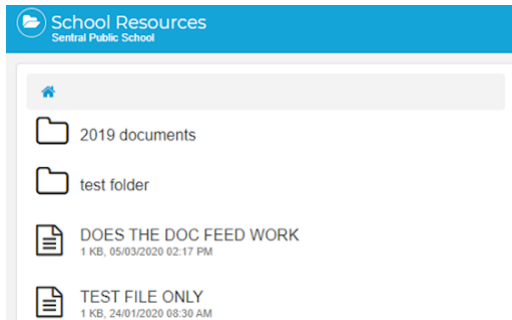


Tip: Parents need to go to the School Forms tab to download the form and then upload the completed form.

Parent view

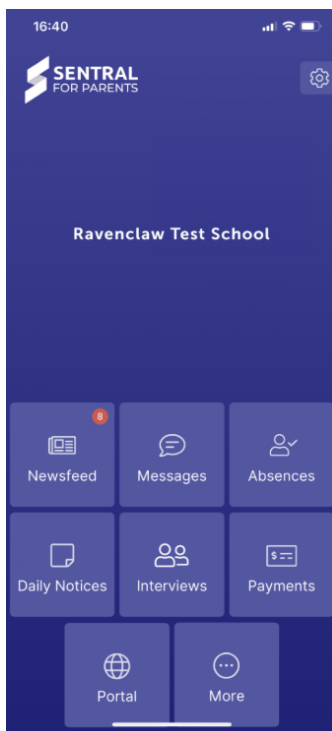
Portal account view

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



App view

When using the App the parent goes to **More** icon.



Select **Resources** to view the documents.

