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1 Introduction

This document describes key steps for successfully setting up Sentral Issue Tracking and describes the default settings and configuration for all staff.

A detailed description for the setup of Issue Tracking has been provided as well as a **checklist of pre-requisites, 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 Issue Tracking module.

2.1 Setup

School Admin staff need to configure the types of areas to track, which staff members will be notified, locations within the school, Priorities of the issues and assignees and access levels.

2.2 Asset Manager

Often an issue registered by staff may relate to an asset e.g. laptop. Asset Manager does not sync to Issue tracking nor vice versa. Schools may need to consider if an asset is damaged or is written off, it may need to be updated in Asset Manager.

2.3 Roles and Responsibilities Setup

The Issue Tracking module is a powerful module with many features and functions that can address the school's tasks and WHS needs. Administration of this 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 Issue Tracking

The following is a description of the setup for each area in the Issue Tracking setup. These details will guide you through the critical configurations you need to setup for Issue Tracking. The configurations can be found via **Issue Tracking module > Issue Tracking Setup**.

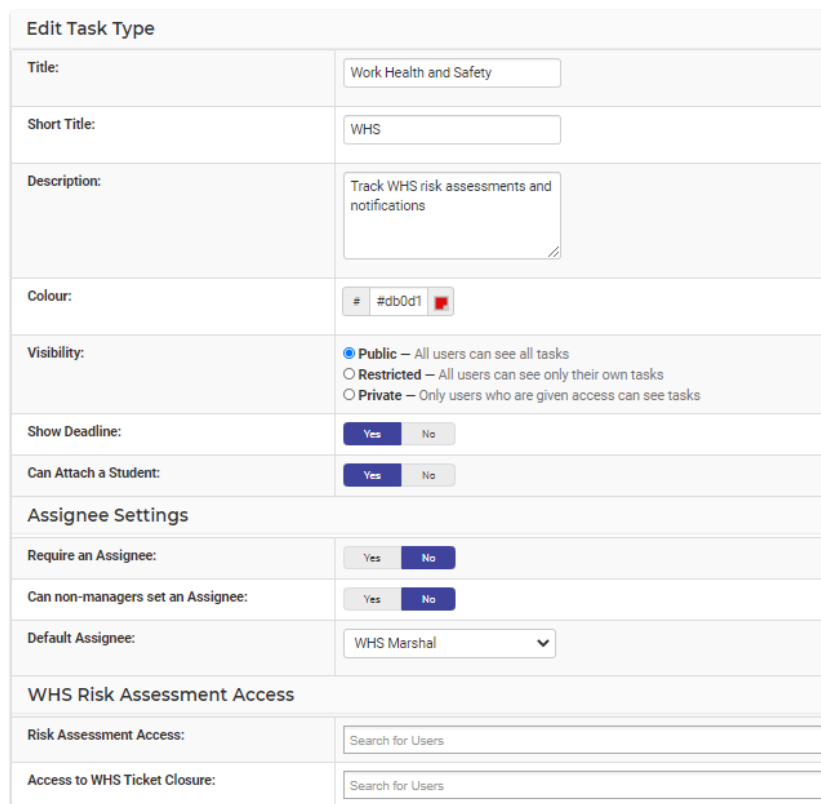
3.1 Types

The Types (Task Types) area is where staff maintain task categories and types. Within each Task Type you can define the description, colour code the type, Assignee Settings.

Schools can Add Type or Edit Types already visible by default.



Select **Edit** WHS as an example as the other types of Issue may have different tasks.



Staff can add deadline & attach students to this issue.

Staff can also add an assignee, non-managers can set an assignee and a default assignee can be assigned.

WHS assessment access enables staff to be assigned to complete risk assessment and access to WHS ticker closures.

3.2 Notifications

The notification options allow a notification to be sent via email and/or a Sentral Dashboard Alert when tasks are created, assigned or changed.

Note: Assignee related options are only effective if the assignee is linked to a Sentral user account. Similarly, email notifications are only possible if the linked Sentral user account has an email address set in the user's profile.

3.3 Locations

Manage buildings and rooms for resources, including importing from your administration system where available.

3.3.1 Priorities

List and adjust priority listings for tasks.

3.3.2 Assignees

Nominate individuals responsible for tasks. You can import assignees from your Sentral User list.

Manage Task Assignees		
		<input type="button" value="Import"/> <input type="button" value="Add"/>
ⓘ You can also import assignees from your Sentral User list by clicking the Import button - 37 user currently not assigned.		
Assignee Name	Linked Account	Action
Charles Brazier	charles.brazier831-staff@data-test.sentral.com.au	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
Charles Cain	charles.cain94-staff@data-test.sentral.com.au	<input type="button" value="Edit"/> <input type="button" value="Disable"/>
Jayden Blackburn	jayden.blackburn239-staff@data-test.sentral.com.au	<input type="button" value="Edit"/> <input type="button" value="Disable"/>

You can quickly import some or all of your Sentral Users into TaskPad so that you may assign tasks to them. Tick the boxes next to the users below to create assignees linked to that user.

3.3.3 Assignee Groups

Create and manage groups of individuals for tasks.

Manage Task Assignee Groups		
		<input type="text" value="Group Name"/> <input type="button" value="Add Group"/>
Group Name	Assignees	Action
Campus Jobs	Cade Wilde, Susan Le Noury, Jenny Case	<input type="button" value="Edit Members"/> <input type="button" value="Rename"/> <input type="button" value="Disable"/>
Car Fanatics	No Assignees	<input type="button" value="Edit Members"/> <input type="button" value="Rename"/> <input type="button" value="Disable"/>
Workplace Health & Safety Committee	John Chung, Robert Jones, Susan Sancbergs	<input type="button" value="Edit Members"/> <input type="button" value="Rename"/> <input type="button" value="Disable"/>

3.3.4 Access

Modify access permissions for different staff types based on the tasks. Using the tabs across the top, toggle between tasks to provide access levels to staff

Access Settings		
School Incident <u>IT</u> General WHS Executive Repairs GA Lost Property IT Support Staff Incident Daily Database Lib		
		<input type="button" value="Save"/>
Groups		
Group	Access Level	
Administration Staff	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Junior School	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Senior School	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Administrators	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Executive	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Maze Administrators	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Assessment Coordinator	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Assessment Manager	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
deffoff	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Non-Exec Faculty Head Teachers	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Reports team	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Term 1	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Test Meeting	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Welfare Group	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage	
Users		
First Name	Last Name	Access Level
John	Chung	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage
Peter	Georgiou	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage
John	Gill	<input checked="" type="radio"/> None <input type="radio"/> View <input type="radio"/> Manage

4 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 Issue Tracking module up and running in no time.

MODULE	CHECKLIST	REVIEW FREQUENCY
Types	Review Issue Tracking Types	Once
Notifications	Review notifications	On a regular basis
Locations	Review Locations	On an annual basis
Priorities	Review Priorities	On an annual basis
Assignees	Review Assignees	On a regular basis
Assignee Groups	Review Assignee Groups	On a regular basis
Access	Review Access Permissions	On a regular basis