Issue Tracking Admin Guide

October, 2025

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Contents

Getting started

Overview

The topics in this section describe key steps for successfully setting up Sentral Issue Tracking. They describe 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.

Considerations, dependencies and pre-requisites

This section highlights the key areas that your Sentral Administrator in consultation with your school's leadership team consider prior to setting up the Sentral Issue Tracking module.

Setup

Your school's Sentral Administrator and School Admin staff need to configure:

- types of areas to track
- which staff members will be notified
- locations within the school
- priorities of the issues
- assignees
- access levels.

Integration with Asset Manager module

Often an issue registered by staff may relate to an asset such as a laptop for example. Asset Manager does not sync to Issue Tracking or vice versa. Your school may need to consider if an asset is damaged or is written off, that it may need to be updated in Asset Manager.

Roles and responsibilities setup

The Issue Tracking module is a powerful module with many features and functions that can address your 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. Your school is responsible for applying access levels for staff to determine what actions they can perform in the module.

Access

To access Issue Tracking from the Sentral home screen:

- Select the menu icon ⣿ and choose Issue Tracking.
- Select ⚙ Setup and choose Issue Tracking Setup.

Configure task types

Overview

Use the information in this topic to add and maintain task categories and types.

Within each task type, you can define the description, apply a colour code for the task type, and configure assignee settings.

Default task types

The following types are built-in:

- Work Health and Safety
- Whole School Incident.

> **Note:** You can edit and hide built-in task types but you cannot remove them.

Add task type
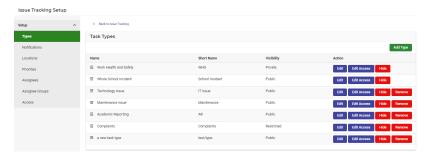
Steps

Follow these steps to add a task type.

1. Select the menu icon ⣿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

3. Select Setup in the left menu and choose **Types**.

4. Select **Add Type**.

    Additional fields display.

5. Enter the title that you want to use for the task type. For example, Maintenance Issue.

6. Select a colour to use for the task type.

7. Enter a short title. For example, Maint.

8. Enter a description.

9. Select a visibility option:

    - Public - for all users to see all tasks

    - Restricted - for all users to see only their own tasks

    - Private - for only users who are given access to see tasks.

10. Select Yes or No for the following settings:

    - Show deadline

    - Can attach a student

    - Require an assignee

    - Can non-managers set an assignee.

11. For Default Assignee, either leave unassigned or select a user from the list.

12. Select **Save**.

Edit task type

Steps
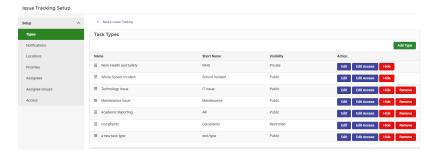
Follow these steps to add a task type.

1. Select the menu icon ⋮⋮⋮ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.
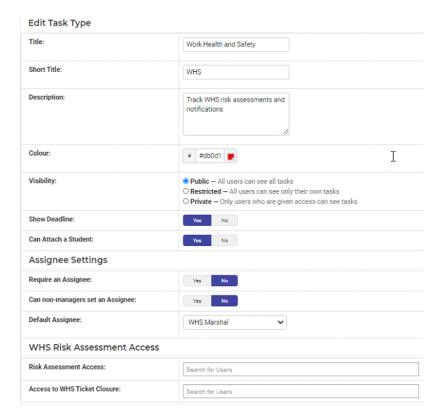
3. Select Setup in the left menu and choose **Types**.

4. Select [Edit] next to a task type.

5. Edit details as required, and select [Save].

> ⭐ **Example:** In the WHS example above:
> - staff can add deadline and 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.
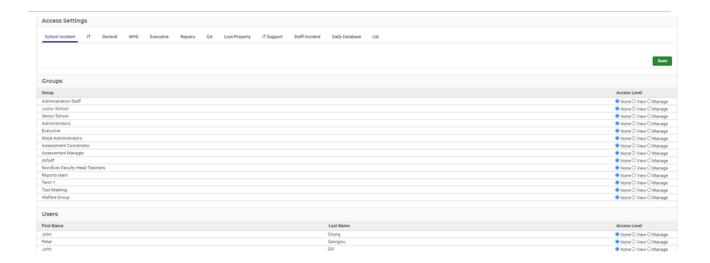
Access

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 | IT | General | WHS | Executive | Repairs | GA | Lost Property | IT Support | Staff Incident | Daily Database | Lib

<div align="right">Save</div>

Groups

Group	Access Level
Administration Staff	● None ○ View ○ Manage
Junior School	● None ○ View ○ Manage
Senior School	● None ○ View ○ Manage
Administrators	● None ○ View ○ Manage
Executive	● None ○ View ○ Manage
Maze Administrators	● None ○ View ○ Manage
Assessment Coordinator	● None ○ View ○ Manage
Assessment Manager	● None ○ View ○ Manage
dsfsdf	● None ○ View ○ Manage
Non-Exec Faculty Head Teachers	● None ○ View ○ Manage
Reports team	● None ○ View ○ Manage
Term 1	● None ○ View ○ Manage
Test Meeting	● None ○ View ○ Manage
Welfare Group	● None ○ View ○ Manage

Users

First Name	Last Name	Access Level
John	Chung	● None ○ View ○ Manage
Peter	Georgiou	● None ○ View ○ Manage
John	Gill	● None ○ View ○ Manage

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Configure issue tracking notifications

Overview

Use the information in this topic to configure notification options to be sent via email and/or a Sentral Dashboard Alert when tasks are created, assigned or changed.

> **(i)** **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.

Steps

Follow these steps to configure notification settings.

1. Select the menu icon ⣿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

3. Select Setup in the left menu and choose **Notifications**.

4. Do one of the following:

   a. Specify the type of notifications you would like to send.

   b. Disable notifications altogether.

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5. Enable or disable the following settings:

a. When a Task is Assigned

Enable this option to send a notification to an assignee when a task is assigned to them.

> (i) **Note:** The assignee must be linked to a Sentral user for this to work.

b. When a Task Changes

Enable this option to notify both the reporter and assignee when a task changes in some way or a comment is added.

> (i) **Note:** The assignee must be linked to a Sentral user for this to work.

c. When a Comment is Added

Enable this option to notify both the reporter and assignee when someone comments on a task.

d. When a Task is Closed

Enable this option to notify the reporter of a task when a task they have entered is closed.

6. Select **Save**.

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Configure location groups

Overview
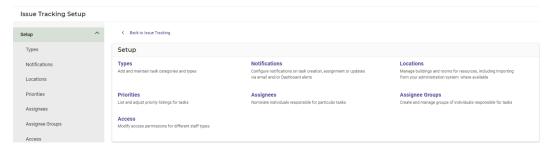
Use the information in this topic to manage buildings and rooms for resources, including importing from your administration system where available.

Add, edit or remove a location groups

Steps

Follow these steps to configure Location Groups settings.

1. Select the menu icon ⣿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

3. Select Setup in the left menu and choose **Locations**.

4. To add a location group or building:

    a. Select **Add Location Group/Building**

    b. Enter a name for the location group or building.

    c. Select **Save** .

5. To remove a location, select **Remove** next to the location group or building, and select **Confirm**

6. To edit a location group or building name:

    a. Select **Edit Locations** next to a location or building.
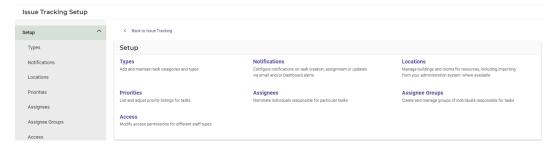
    b. Select **Rename Location Group/Building**

    c. Update details and select **Rename Location Group/Building** again.

Add, edit or remove a location or room within a group location or building

Steps
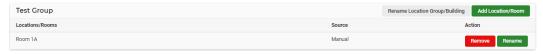
1. Select the menu icon, and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.
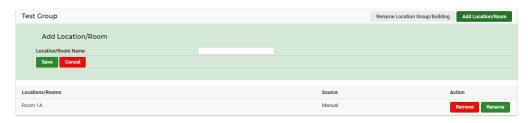
3. Select Setup in the left menu and choose **Locations**.

4. Select **Edit Locations** next to the location group or building where you want to add a location or room.

5. To add a location or room:

    a. Select **Add Location/Room**

    b. Enter a name for the location or room.

    c. Select **Save**.

6. To rename a location or room:

    a. Select **Rename** next to the location or room.

    b. Update details and select **Rename** again.

7. To remove a location or room within a location group or building, select **Remove** next to the location or room, and select **Confirm**

Configure priorities for tasks

Overview
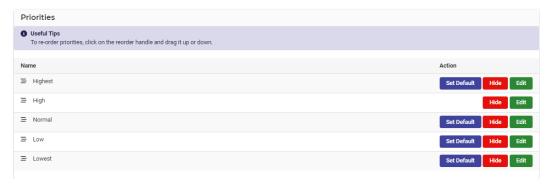
Use the information in this topic to list and adjust priority listings for tasks.

Steps

1. Select the menu icon ⦂⦂⦂ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

3. Select Setup in the left menu and choose **Priorities**.

4. To edit the name of a priority:

   a. Select **Edit** next to the priority.

   b. Enter a new name and select **Edit** again.

5. To hide a priority:

   a. Select **Hide** next to the priority.

   b. Select **Confirm** to disable the priority.

6. To set a priority as the default, select **Set Default** next to the priority.

   The **Set Default** button disappears - meaning that the priority is now the default.

7. To re-order the list of priorities, use the drag handle icon ☰

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Configure assignees

Overview

Use the information in this topic to nominate individuals responsible for particular tasks.
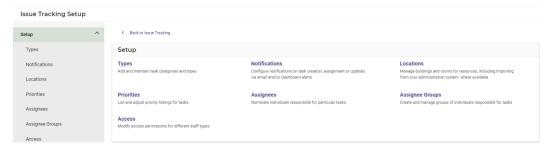
> **(i)** **Note:** You can import assignees from your Sentral User list.
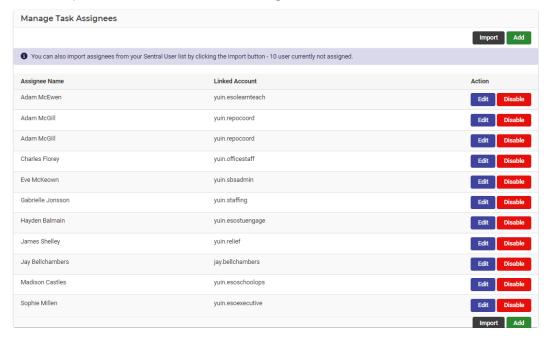
Import assignees

Steps

1. Select the menu icon ⣿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

3. Select Setup in the left menu and choose **Assignees**.

4. Select **Import**

5. The Import Assignees from Sentral Users screen displays.

   TaskPad is previous

   ### Import Assignees from Sentral Users

   ⓘ 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.

Name	Username
☐ Bill **Williamson**	bill.williamson
☐ Mr **Sentratest**	sentraltest
☐ Mr Bilbo **Baggins**	bilbo.baggins
☐ Mr P **Cummins**	cumminsp
☐ Mr Arnie **Liss-Test**	arnie-liss-test
☐ Dr Sienna **Moowattin**	yuin.apsstaff
☐ Dr Sienna **Moowattin**	yuin.teacher
☐ Purchase **Order1**	purchase.order1
☐ Mystery **User**	Mystery.User
☐ Mystery **User**	Mystery.User1

6. Select some or all of your Sentral Users and select **Import** .

Add new assignee

Steps

1. Select the menu icon ⠿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

   ### Issue Tracking Setup

Setup ⌃	
Types	‹ Back to Issue Tracking
Notifications	
Locations	
Priorities	
Assignees	
Assignee Groups	
Access	

   Setup

   Types
   Add and maintain task categories and types

   Notifications
   Configure notifications on task creation, assignment or updates via email and/or Dashboard alerts

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

   Priorities
   List and adjust priority listings for tasks

   Assignees
   Nominate individuals responsible for particular tasks

   Assignee Groups
   Create and manage groups of individuals responsible for tasks

   Access
   Modify access permissions for different staff types

3. Select Setup in the left menu and choose **Assignees**.

   ### Manage Task Assignees

   Import   Add

   ⓘ You can also import assignees from your Sentral User list by clicking the Import button - 10 user currently not assigned.

Assignee Name	Linked Account	Action
Adam McEwen	yuin.esolearnteach	Edit Disable
Adam McGill	yuin.repocoord	Edit Disable
Adam McGill	yuin.repocoord	Edit Disable
Charles Florey	yuin.officestaff	Edit Disable
Eve McKeown	yuin.sbsadmin	Edit Disable
Gabrielle Jonsson	yuin.staffing	Edit Disable
Hayden Balmain	yuin.esostuengage	Edit Disable
James Shelley	yuin.relief	Edit Disable
Jay Bellchambers	jay.bellchambers	Edit Disable
Madison Castles	yuin.esoschoolops	Edit Disable
Sophie Millen	yuin.esoexecutive	Edit Disable

   Import   Add

4. Select **Add** .

5. Under Add New Assignee:

   a. Enter a name or a role title (for example, IT Coordinator).

   b. Select a Sentral User from the list.

   c. Select **Save** .

Edit assignee

Steps

1. Select the menu icon ⠿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.
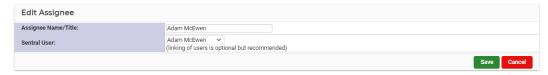
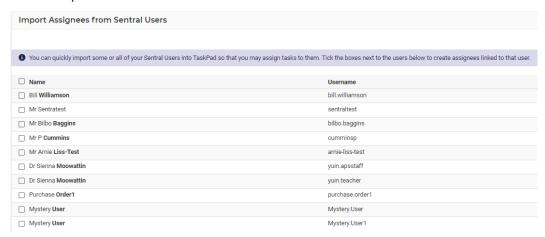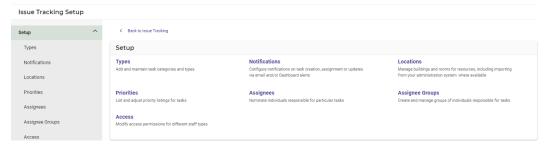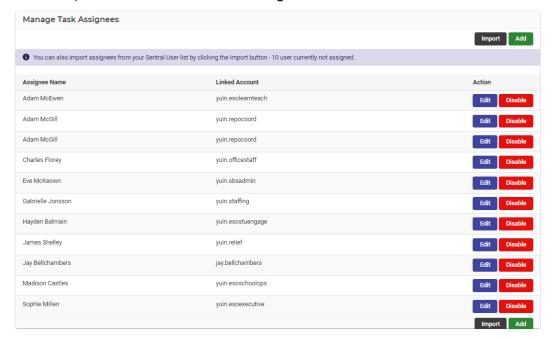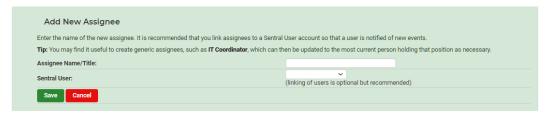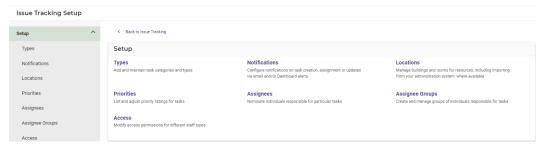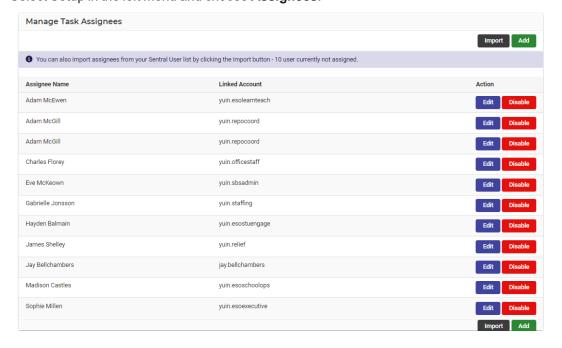
3. Select Setup in the left menu and choose **Assignees**.

4. Select **Edit** next to an assignee.

Edit Assignee	
Assignee Name/Title:	Adam McEwen
Sentral User:	Adam McEwen ⌄
	(linking of users is optional but recommended)

Save **Cancel**

5. Under Edit Assignee:

    a. Update the name or a role title.

    b. Update the Sentral User.

    c. Select **Save** .

Disable assignee

Steps

1. Select the menu icon ⣿ , and then choose Issue Tracking.
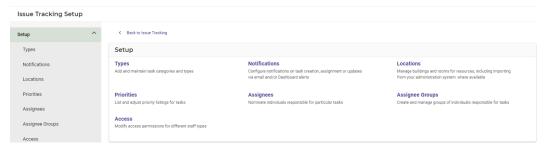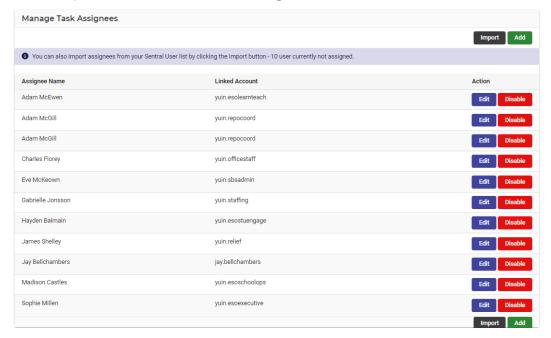
2. Select ⚙ Setup and choose **Issue Tracking Setup**.

Issue Tracking Setup

Setup ⌃	‹ Back to Issue Tracking
Types	**Setup**
Notifications	**Types** — Add and maintain task categories and types **Notifications** — Configure notifications on task creation, assignment or updates via email and/or Dashboard alerts **Locations** — Manage buildings and rooms for resources, including importing from your administration system where available
Locations	
Priorities	**Priorities** — List and adjust priority listings for tasks **Assignees** — Nominate individuals responsible for particular tasks **Assignee Groups** — Create and manage groups of individuals responsible for tasks
Assignees	
Assignee Groups	**Access** — Modify access permissions for different staff types
Access	

3. Select Setup in the left menu and choose **Assignees**.

Manage Task Assignees

Import **Add**

ⓘ You can also import assignees from your Sentral User list by clicking the Import button - 10 user currently not assigned.

Assignee Name	Linked Account	Action
Adam McEwen	yuin.esolearnteach	**Edit** **Disable**
Adam McGill	yuin.repocoord	**Edit** **Disable**
Adam McGill	yuin.repocoord	**Edit** **Disable**
Charles Florey	yuin.officestaff	**Edit** **Disable**
Eve McKeown	yuin.sbsadmin	**Edit** **Disable**
Gabrielle Jonsson	yuin.staffing	**Edit** **Disable**
Hayden Balmain	yuin.esostuengage	**Edit** **Disable**
James Shelley	yuin.relief	**Edit** **Disable**
Jay Bellchambers	jay.bellchambers	**Edit** **Disable**
Madison Castles	yuin.esoschoolops	**Edit** **Disable**
Sophie Millen	yuin.esoexecutive	**Edit** **Disable**

Import **Add**

4. Select **Disable** next to an assignee.

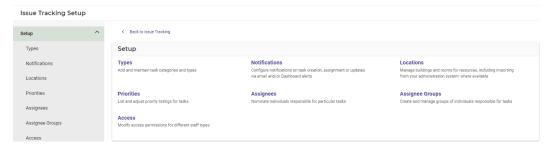5. Select **Confirm** .

Manage task assignee groups

Overview

Use the information in this topic to create and manage groups of individuals for tasks.

Add group

Steps

1. Select the menu icon ⣿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

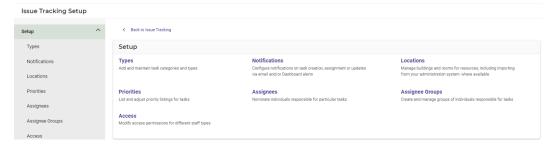3. Select Setup in the left menu and choose **Assignee Groups**.

4. Enter a name for the new group and select **Add Group** .

Edit groups

Steps

1. Select the menu icon ⣿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

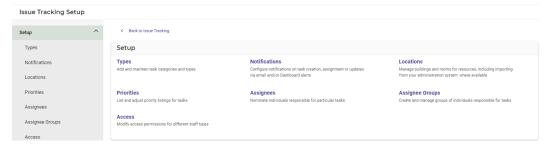3. Select Setup in the left menu and choose **Assignee Groups**.

4. To assign members to a group:

   a. Select **Edit Members** next to a group name.

   b. In Manage Group Members, select one or more group members, and then select **Save**

5. To rename an assignee group:

   a. Select **Rename** next to a group.

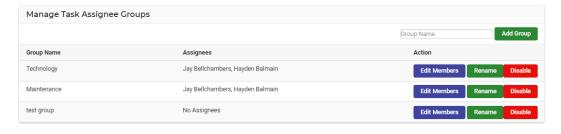   b. Update the name of the group and select **Rename** again.

Disable task assignee groups

Steps

1. Select the menu icon ⠿ , and then choose Issue Tracking.

2. Select ⚙ Setup and choose **Issue Tracking Setup**.

3. Select Setup in the left menu and choose **Assignee Groups**.

4. Select **Disable** next to an assignee group name.

5. Select **Confirm** .

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
Properties	Review Priorities	On an annual basis
Assignees	Review Assignees	On an annual basis
Assignee Groups	Review Assignee Groups	On an annual basis
Access	Review Access Permission	On an annual basis

Issue Tracking FAQs

How to setup notification triggers when creating and editing tasks in issue tracking?

Overview

Sentral administrators can decide how, when and if a notification is sent to assignees when tasks are created in Issue Tracking.

To setup notifications

1. Navigate to **Issue Tracking** module.
2. Select Issue **Tracking Setup**.
3. Select **Notifications**.
4. For **Notification Types**, select the preferred notification method from the drop-down menu.
5. For the following fields, use the **Enabled/Disabled** toggles to select when a notification is sent:
   a. When a task is assigned.
   b. When a task changes.
   c. When a comment is added.
   d. When a task is closed.
6. Select **Save**.

Issue Tracking Setup - Task Types

Overview

To setup the type of tasks your school may encounter:

1. Navigate to **Issue Tracking** module.
2. Select **Issue Tracking Setup**.
3. Select **Types**.
4. Select **Add Type**.
5. Enter a title, choose a colour and provide a short title.
6. Provide a short description if necessary.
7. Select required Visibility for the Task Type. The Visibility selection will depend on the type of task and who should have access. Eg. A teacher may not have access to Executive Task Types.
8. For the following, make appropriate Yes or No toggle selections based on your schools' preferences:
   a. Show deadline.
   b. Can attach a student.
   c. Require an assignee:
   d. Can non-managers set an assignee:
9. (Optional) Select **Default Assignee**: in drop-down.
10. Once completed, save **Task Type**.

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> **Note:** Some task types are built in and cannot be removed, however can be edited, access can be edited or hidden.

Creating assignees and Assignee groups

Overview

When creating tasks in Issue Tracking, users can assign a Group or a user to a particular task.

The below steps are recommended to action first, as it affects the ability for you to later assign individual users to Groups.

To add individual users to be able to assign tasks

1. Navigate to **Issue Tracking** module.
2. Select **Issue Tracking Setup**
3. Select **Assignees**.
4. Select **Add**. You can also use the Import function if you have many users to import.
5. Enter the name or title.
   it is recommended to link the user to their Sentral User account.
6. Then select **Save**.

To create a group then assign individuals to the group.

1. Select **Assignee Groups**.
2. Enter a Group name in the **Group Name** window then select **Add Group**.
3. Select **Edit Members** for the new Group.
4. Check the boxes alongside the individual users and Save. If a user is not displaying, refer to instructions **To add individual users to be able to assign tasks**above.
5. Click **Back**.

The individuals and/or Group will now display for selection in the drop-down menu for Assigned to: when creating a new Task.

Issue Tracking Setup | Locations

A Sentral administrator can manage these Locations, such as adding, editing, and removing Locations and Location Groups/Building.

To manage locations -

Navigate to Issue Tracking module.

Select Issue Tracking Setup.

Select Locations.

Do one or more of the following:

To remove or add a new Location Group/Building

Select Add Location Group/Building, enter a name and Save. Select Add Location/Room, enter a name and Save.

Select Remove on the Location Group/Building and then Confirm.

To add a new, remove or Rename a location of an existing Location Group/Building.

Select Edit Locations for the Location Group/Building, select Add Location/Room, enter a name and Save.

Select Rename, enter a new name and select Rename.

Select Remove for the location and then Confirm.