

# Strategic Planning Admin Guide

September, 2025

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# Getting started

## Overview

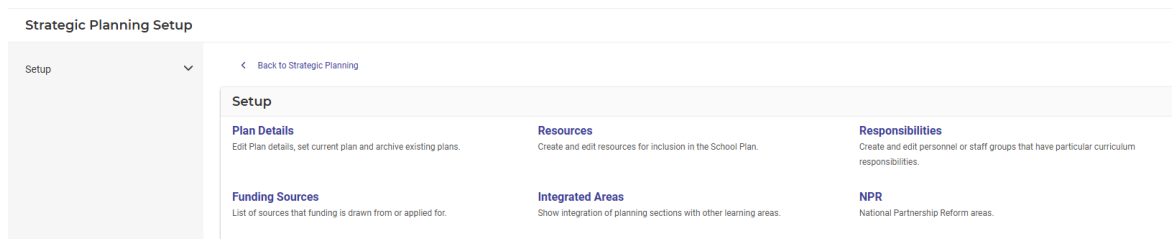
Topics in this section describe key steps for successfully setting up Sentral Strategic Planning.

A detailed description for the setup of each area has been provided as well as a checklist of prerequisites, considerations, decisions and recurring tasks that need to be reviewed on a periodic basis.

## Access

1. Select the menu icon  and choose **Strategic Planning** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Planning Setup**.

The Strategic Planning Setup screen displays.



# Considerations, dependencies and prerequisites

## Overview

This section highlights the key areas that your school administration staff need to consider prior to setting up the Sentral Strategic Planning module.

## Staff access

### Action

Review permissions to ensure the correct staff have access to set up this module. Role permissions allow you specify what capabilities a user with a given access level will be able to do within a Sentral module.

1. Go to **Setup | Manage User Accounts | Manage Permissions**.

Sentral Setup > Authentication > Permissions > Manage Permissions

### Manage User Permissions

Modify Access Levels for: Strategic Planning Export Save

Role permissions allow you specify what capabilities a user with a given access level will be able to do within a Sentral module. Administrator level access always has full level of access.

	Viewer	Teacher	Coordinator	Executive
Create or edit EduMaP plan details	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
Create/Edit Management Plans	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
Create/Edit Strategic & Annual Plans	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
Modify school details	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
Import school data	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
Manage users	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow
View, Print and Email Reports	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
View other users profiles	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
View school data	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
Access OASIS reports	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow
<b>Setup</b>				
Has access to strategic planning setup	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input checked="" type="radio"/> None <input type="radio"/> Allow	<input type="radio"/> None <input checked="" type="radio"/> Allow

Save

2. Next to **Modify Access Levels for**, select **Strategic Planning** from the dropdown list.
3. Review permissions and update where required.
4. Select **Save**.

### Reason

For the Strategic Planning module to operate and be useful, you must have user accounts created for staff members at your school.

## Sentral vs mandated systems

### Action

Determine if the Strategic Planning module will be implemented for school governance and reporting to external bodies. Consider teaching and learning excellence and achievement, professional leadership, visions and values, learning evaluations and management. These then need to be monitored regularly, updated, and actioned as required.

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## Roles and responsibilities setup

Administration of the Strategic Planning 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, which will determine what actions they can perform in the module.

# Configure Strategic Planning

The topics in this section describe how to set up each area in the Strategic Planning module. Settings that are not explained here can be configured without explanation or configured later.

## Configure Plan Details

### Overview

Use the information in this topic to edit Plan details, set current plans and archive existing plans.



### Considerations

Some jurisdictions require plans to start from a specific year. Please ensure that the starting year corresponds to the one required.



**Tip:** When there are multiple strategic plans, only one can be set as Default.

### Steps

1. Select the menu icon  and choose **Strategic Plans** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Plans Setup**.
3. Select **Setup** in the left menu and choose **Plan Details**.



Plan Details			
2013-2014 Strategic Plan			
2017-2019 2020 STRATEGIC LEADERS IN LEARNING			
2017-2019 2018-2020 Special Strategic Plan			
2013-2014 NISN Master Strategic Plan			
2020-2022 2020-2021 Master Plan			

4. To add a new plan, enter a name for the new strategic plan and select **Add**.  
The plan is added to the list.
5. To edit the name and starting year of a plan, select **Edit** next to the plan. Update details and select **Save**.





**Warning:** Changing the time period of an existing plan will shift any data currently associated with this plan.


## Configure Resources

### Overview

Use the information in this section to create and edit resources for inclusion in the School Plan.

### Steps

1. Select the menu icon  and choose **Strategic Plans** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Plans Setup**.
3. Select **Setup** in the left menu and choose **Resources**.
4. Select the strategic plan to edit.



5. Do any of the following:
  - a. Enter a name for the new resource and select **Add**.
  - b. Select **Edit** next to a resource to update the resource name. Select **Save**.
  - c. Select **Import** to import a list of resources. Type or paste the list of resources in the pop-up that displays - one per line. Select **Save**.
  - d. Use the **Copy** function to add a list of resources from an existing plan.
  - e. Use the drag handles  to move resources into a different order.

## Configure Responsibilities

### Overview

Use the information in this section to create and edit personnel or staff groups that have particular curriculum responsibilities.

### Steps

1. Select the menu icon  and choose **Strategic Plans** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Plans Setup**.
3. Select **Setup** in the left menu and choose **Responsibilities**.
4. Select the strategic plan to edit - and add responsibilities.



Adding a new person or party (i.e. Group) to be responsible for the strategic plan is a two-part process.
5. Do any of the following to create new responsibility.
  - a. To add person or group, choose the type of responsible member and select **Add**. Then enter the name and link user account for individual user.
  - b. To copy a list of All Responsible Persons/Parties from an Existing Plan, select the Plan from the list and then select **Copy**.
  - c. **Import User List** - Use this import to build the responsibility list from the user list. This will automatically link the responsibility to the user so they can see any responsibilities assigned to them under their teacher profile.
  - d. **Import Responsible List** - To import a list of Responsible Persons/Parties, select the **Import Responsible List** button, then type or paste the list of resources one per line in the dialog.

## Configure Funding Sources

### Overview

Use the information in this section to create and edit the list of sources that funding is drawn from or applied for.

### Steps

1. Select the menu icon  and choose **Strategic Plans** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Plans Setup**.
3. Select **Setup** in the left menu and choose **Funding Sources**.
4. Select the strategic plan to edit.
5. Add a new funding source, copy from a plan or import via a list.



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## Configure Integrated Areas

### Overview

Use the information in this section to show integration of planning sections with other learning areas.

### Steps



1. Select the menu icon  and choose **Strategic Plans** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Plans Setup**.
3. Select **Setup** in the left menu and choose **Integrated Areas**.
4. Select the strategic plan you wish to work in.
5. Add, copy from or import areas of integration.

## Configure NPR

### Overview

Use the information in this section to configure National Partnership Reform(NPR) areas. The labelling of these is determined by your school.

### Steps

1. Select the menu icon  and choose **Strategic Plans** in the **School Admin** group.
2. Select  **Setup** and choose **Strategic Plans Setup**.
3. Select **Setup** in the left menu and choose **Integrated Areas**.
4. Select the strategic plan you wish to work in.
5. Create new, copy from, or import a list of reform areas.



# 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 Strategic Planning module up and running in no time.

Module	Checklist	Review frequency
Plan details	Type of plans	On an annual basis
Resources	Resource allocation	On an annual basis
Responsibilities	Who is responsible	On an annual basis
Funding Sources	What is the funding	On an annual basis
Integrated Areas	Areas What areas are integrated NPR This stands for National Partnership Reform	On an annual basis
Areas	What areas are integrated	On an annual basis
NPR	This stands for National Partnership Reform	On an annual basis