



**SENTRAL
EDUCATION**

Documents User Guide

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Document Overview

Target Audience

- All staff

Content

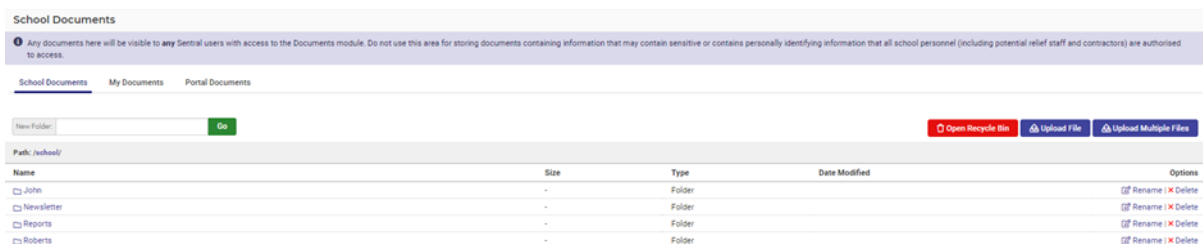
- School and My documents
- Portal document
- Online Forms (Portal Console)

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.

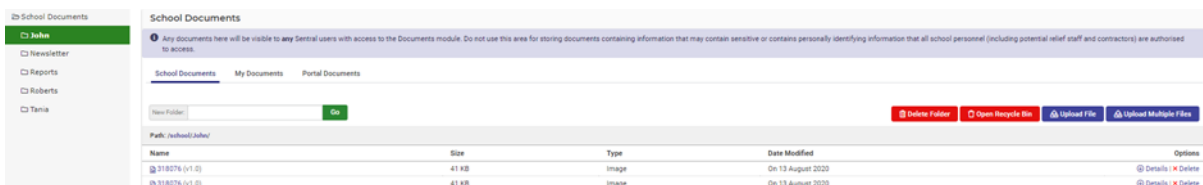


Best practice would be to create folders for filing documentation accordingly.


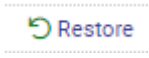
1. Go to the search field and type the name of your folder



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.

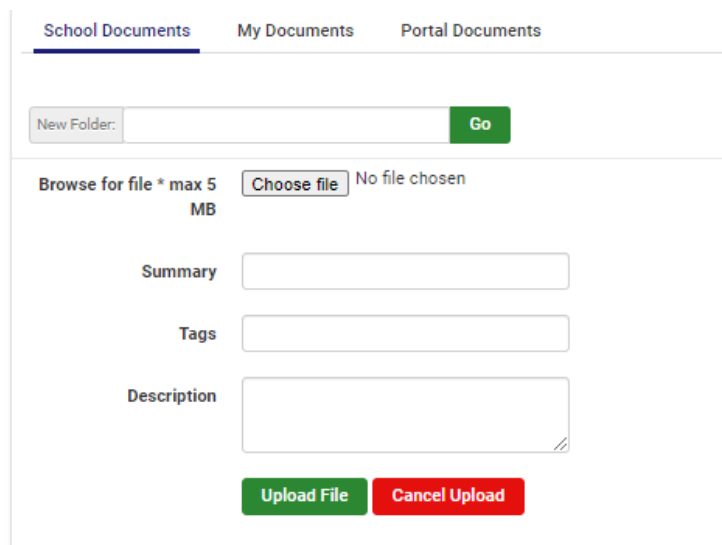
- To retrieve deleted files, go to 
- Select the items to 
- Once Folders have been created, staff can then upload documents (Image, word or CSV) into folders or to the general page.


Upload File

Summary: Name of the document.

Tags: Relevant tags associated with this document.

Description: Detailed outline of the document or image.



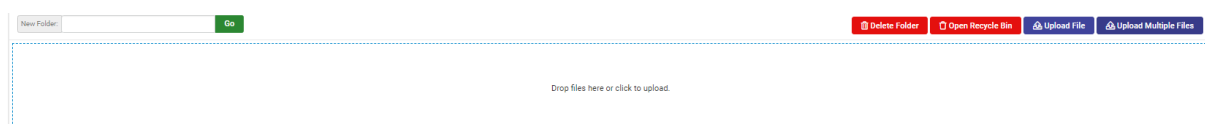
- Upload File** and the file will display.
- You are then given the option to view **Details**. 



- 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 file 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

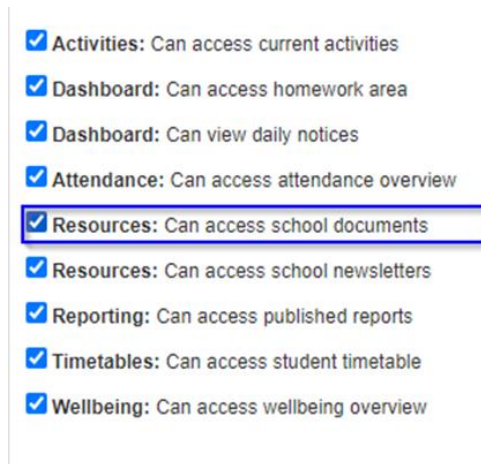
Any document here is only visible to the individual user. The steps from School Document apply.

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.

New Folder:

Browse for file * max 5 MB No file chosen

Summary

Tags

Description

Portal Access Restrictions No access restriction Add access restriction

Access Restriction Type *

Start Date *

End Date

Publish to Portal Feed

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.

The screenshot shows the Portal Console interface with four main sections:

- News Feed:** This is where you manage feed items, post news and edit content sent to the Parent Portal and App. It includes options to create and post new feed items, post feed items to specific classes, years or students, and for quick access click the button below to post a feed item. Buttons: Add New Feed Item, Manage Feed.
- School Documents:** This is where you can upload portal documents, online forms and organise files and folders to make document management easier. It includes options to upload files (documents) to portal, post files to portal as a feed item, manage access restrictions on files, and upload online forms for Portal users. Buttons: Upload New Portal Document, View Documents.
- Parent Interviews:** This is where you can create interview sessions, manage bookings and print schedules. It includes options to visit interviews. Button: Visit Interviews.
- Usage:** This section shows a pie chart and a legend for 'Logged in Today' and 'Not Used Today'. It includes a button to see portal usage.

From here you can view **Portal Documents & Upload Documents** and be redirected 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	-
HS Reports Sample (v1.0)	50 KB	All Years	PDF	On 28 November 2019
HS Interim Report (v1.0)	167 KB	All Years	PDF	On 13 August 2020

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.**

Online Forms						Upload Form	View Form Submissions
Name	Description	Size	Type	Date Created	Actions		
form	send back to school	24 KB	Word	30/11/2018 10:19	Delete		
School Form	Please return ASAP	12 KB	Word	04/12/2018 13:12	Delete		
Permission Form_Primary	Permission Form_Primary	13 KB	Word	09/01/2019 10:00	Delete		
Report	Report	50 KB	PDF	29/11/2019 11:17	Delete		
epi pen	test	301 KB	PDF	23/09/2020 17:01	Delete		

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 in a pending state.

Portal Submissions						Back To Online Forms
Form Name	Portal User Name	Submissions	Date Uploaded	Status	Actions	
Order Form	Elijah Heading	Sentral Attendance hardware Order- Septembr 2020.pdf	24/09/2020 08:23	PENDING	Approve Reject	
form 1 - menu (form deleted)	Elijah Heading	Screen Shot 2020-08-25 at 9:30:19 am.png	27/08/2020 15:27	REJECTED	× Rejected	
form 1 - menu (form deleted)	Elijah Heading	314807 - Sentral Education_Cloud Based Licence(1).pdf	27/08/2020 15:27	COMPLETE	✓ Complete	

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.

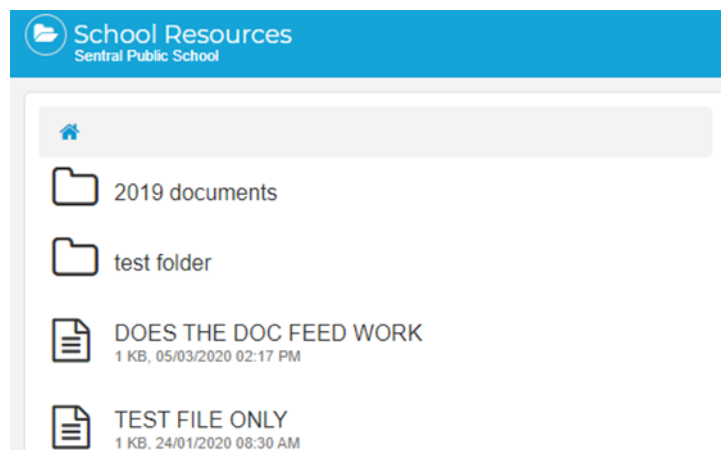
7. The school can then save, print or file the form and Accept/Reject.

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

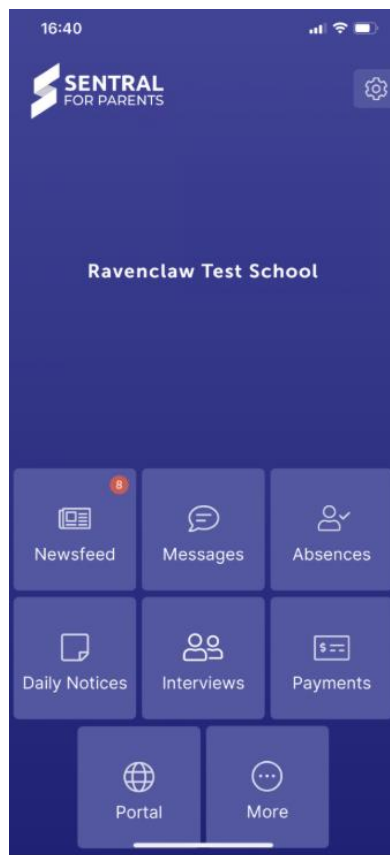
Parent View

When a parent signs into their Portal Account, they can go to School Resources to see documentation.

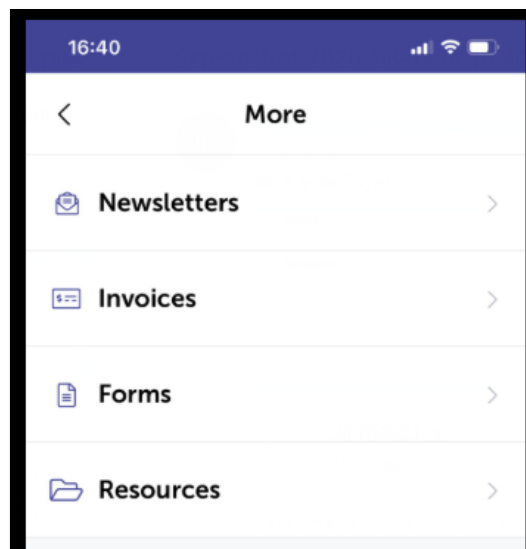
Folders can be clicked on to view the files.



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