Activities User Guide

December, 2024

SENTRAL

Contents

Introduction

Schools are busy places with a diverse range of activities taking place on any one day. Learning is no longer restricted to the classroom and may take place in a variety of contexts. Together with the mix of co-curricular activities offered in most schools, this presents the need for an efficient system to manage the complex nature of today's daily routines.

Sentral's Activities module offers a highly configurable structure for planning, managing, and implementing the events and activities relevant for your school. You'll find:

- Activities approval and risk management workflows

- Permissions, payments, student registration, and attendance tracking

- Centralised venue management

- Ability to define categories and types of activities relevant for your school

- Ability to add customised questions to activities

- Integration between other Sentral modules and visibility over student participation in extracurricular activities

- Reporting functionality that provides information about activities or excursions

- Logical search and filtering functionality with options to monitor students and run reports.

- Ability to award students points for participation or completion of extra curricula requirements.

Product versions

The version of Sentral at your school may have a different user interface to the one shown in our YouTube videos and this guide. The features available are generally the same, although you may see differences because of the way Activities is configured at your school.

Role-based permissions

Your access is assigned to you by the Sentral Administrator (Administrator) at your school. They can set permissions at a granular level, and this determines the type of access you have and the functions you can access in the Activities module.

Access

To access the Activities module, select the Sentral menu icon ⣿ and then under Student Admin, select **Activities**. The Activities home screen displays.

Activities home screen

> **Video:** Watch this video on our YouTube channel for an intro to the Activities home screen.
> **Activities | Intro to the home screen**

Refer to the table below for a description of information on the Activities home screen.

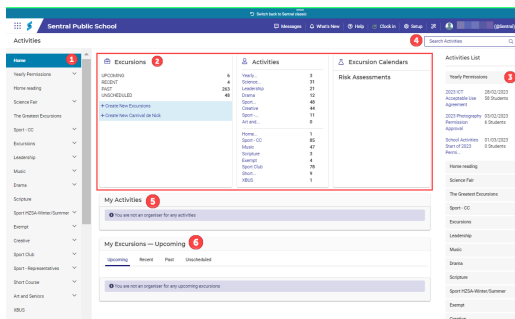| Reference number	Description	Example
1	Lists the activity categories and groups created by your Sentral Administrator. Lists menu options for Reports, Activity Reminders, and Bulk Management.	Category Section = Campus A Category = Community Service Activity = Red Shield Appeal Category section = Excursions Category = Camps Activity = Year 7 sports camp
2	Displays a tally of activity categories with shortcuts to current events organised via this module and other information configured by your Sentral Administrator.	Link to risk assessment templates Link to excursion calendar for a calendar view of the upcoming excursions by month.
3	Categories with scheduled activities listed underneath.	Category = Yearly permissions Activity = 2023 ICT Acceptable Use Agreement
4	Search function enables you to search students and activities.	
5	Lists activities that you are responsible for or assigned to. Provides access to activity details where you'll be able to manage the activities you're assigned to or responsible for. Activities listed will usually be set up by your head teacher or administrator.	
6	Lists excursions by upcoming, recent, past and unscheduled.	

Create an activity or excursion

Overview

There are several ways to create an activity or excursion:

- From the left menu
- From the Activities section of the Activities home screen
- From the Excursion section of the Activities home screen – for excursion categories selected by your Sentral Administrator to display on your Activities home screen.

Stage 1: Create an activity or excursion

1. Select the Sentral menu icon ⠿ and then under Student Admin, select **Activities**.

   The Activities home screen displays.

2. Do one of the following:

   a. In the left menu, select the category and choose **All**. Select New [activity/excursion name].

      The New [category] Activity screen displays.

   b. In the Activities section, select a Category link. Select **New** [activity/excursion name].

      The New [category] Activity screen displays.

   c. In the Excursion section, select Create New [excursion category name].

      The New [excursion category name] screen displays.

      The Overview tab is selected by default. Other tabs include Costs, Academic Reports, Student Portal, Questions.

3. Review the on-screen explanations for fields on the Overview tab.

   > ⓘ **Note:** The fields that you see on this screen may differ between schools. This is because your Sentral Administrator has the permissions to turn settings on and off, add customised fields, and mark certain fields as mandatory.

4. Complete the following sections of the Overview tab:

   a. Activity Details

   b. Availability.

   > 💡 **Tip:** You must enter at least the Excursion Name, Start Date and End Date. You won't be able to select Save until you complete the mandatory fields on the Overview tab.

   > ⓘ **Note:** Some information you add in this section gets reflected in permission forms or notes published via the Parent Portal if your Sentral Administrator has configured the Portal Console to enable permission forms to be available in the Parent Portal.

5. Select **Save**.

   You can update the permission form due date after the activity has been published to the Portal.

   > 💡 **Tip:** You have the option to complete other tabs at different stages of the approval workflow.

Stage 2: Enter cost information

Use the Costs tab to record the financial details for the excursion you are creating. It helps the organiser to estimate the activity financial budget as well as assess the excursion fee per attendee at different occupancy or capacity levels.

There are two sections to complete:

- Fixed Costs: an amount that does not change with number of participants
- Variable Costs: costs that relate to each participant (meals and hotels).

   > ℹ️ **Note:** Your school's policy and workflows determine whether you must complete this tab. From a system perspective, this tab is optional.

1. First, create the activity or excursion.

   See **"Stage 1: Create an activity or excursion" on the previous page**

2. Enter the total number of students.

3. Do any of the following:

   a. Select **Add Fixed Cost Item** and complete supplier details.

   b. Select **Add Variable Cost Item**, and complete supplier details.

   c. To remove any costs, select **Remove** next to the cost item.

   Summary costs and projected summary costs display at the bottom of the screen.

4. Select **Save**.

5. The cost summary reflects accurate information once students are added. You may need to come back to this tab.

Stage 3: Enter Excursion information

Use the Excursion tab to view the cost for the excursion and add checklist items/tasks required for the excursion.

> **(i) Note:** his tab only displays for excursion-based activities. Calculations are based on details entered on the Costs tab.

1. First, create the excursion and enter cost information.

   See **"Stage 1: Create an activity or excursion" on page 7** and **"Stage 2: Enter cost information" on the previous page**

2. Select the Excursion tab.

3. Enter the cost value per student for the entire excursion.

4. Select the type of excursion from the list.

5. Enter information to track the progress of various tasks within the activity.

6. Select **Save** .

Stage 4: Enter Academic Reports information

Integration with Academic Reports

There are settings in both the Activities and Academic Reports modules that need to be enabled for the activity to display and allow automatic synchronisation with Academic Reports.

- Activities module – Show in Reports option needs to be set to Yes
- Academic Reports – Additional settings to allow synchronisation of student participation.

Use the information in this section to record information for your students' academic reports.

1. First, create the excursion, and enter cost and excursion information.

   See **"Stage 1: Create an activity or excursion" on page 7"Stage 2: Enter cost information" on the previous page**,and **"Stage 3: Enter Excursion information " above**

2. Select the Academic Reports tab.

3. Specify whether to show excursion details in Academic Reports.

4. Enter the report name to be used in Academic Reports.

5. Do one of the following:

   a. Enter the description to use in Academic Reports.

   b. Leave the field blank to use the description from the Overview tab.

6. Do one of the following:

   a. Enter outcomes to include on a co-curricular section of the academic report.

   b. Leave the field blank.

7. Select **Save** .

   The saved activity or excursion displays in the appropriate category tally on the Activities home screen.

Stage 5: Enter student portal information

Use the information in this section to complete student portal details if your school has Sentral ST and is configured to use the student portal.

1. First, create the activity or excursion.

   See **"Stage 1: Create an activity or excursion" on page 7**, **"Stage 2: Enter cost information" on page 8**, **"Stage 3: Enter Excursion information " on the previous page** , **"Stage 4: Enter Academic Reports information" on the previous page**

2. Select the Student Portal tab.

3. Specify whether to show the activity or excursion in the student portal.

4. Enter details.

5. Specify whether to allow self-registration.

6. Select **Save** .

Stage 6: Create customised questions

Use the information in this section to add customised questions to an activity that you would like parents or guardians to answer using the Portal.

1. First, create the activity or excursion.

   See **"Stage 1: Create an activity or excursion" on page 7**, **"Stage 2: Enter cost information" on page 8**, **"Stage 3: Enter Excursion information " on the previous page** , **"Stage 4: Enter Academic Reports information" on the previous page**

2. Select the Questions tab.

3. Enter text in the Question box.

4. Select the question type to suit the response options you want to make available.

   For Single Choice and Multiple Choice, select Add Answer and define the response options.

5. Specify whether the question must be answered.

6. (Optional) Select Add New Question and repeat these steps for up to 20 questions.

7. Do any of the following:

   - To remove answers to questions, select **X** next to the answer.
   - To remove questions, select **Remove**below a question.
   - To remove all questions, select **Remove**at the bottom of the screen.

8. Select **Save** .

   The questions display in the Portal when the activity or excursion is published. Portal users can answer the questions as part of submitting their activity response.

Manage school activities

Overview

Use the information in this section to add information to an activity or excursion that was initially created as a 'shell' with minimum details.

> **Tip:** You can add relevant information to any saved activity for each step of the approval workflow. You may need to complete or review some information prior to the go live for or post go live

> **Video:** Watch this video on our YouTube channel to learn about editing activities or excursions
> **Activities | How to edit an activity**

To edit a school activity

1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select **Activities**.

    The Activities home screen displays.

2. Use one of the following options to open the activity:

    a. Under **My Activities**, open the activity from the list.

    b. Under **Activities List** on the right, open the activity.

    c. Enter the activity name in the Search box and select from the options displayed.

    d. In the **Activities** section, select a Category link. Open the activity from the list.

    e. In the left menu, select the category and choose **All**. Open the activity from the list.

    f. Under **Activities list** on the right, select a Category link, and then open the activity from the list.

    Overview information for the activity is displayed.

3. View information about the activity.

    • workflow approval status at the top of the screen

    • activity details on the right

    • students information.

    If you're an organiser you can also see additional items that were not part of the original creation of the activity.

    > **Note:** What you see is determined by your Sentral Administrator – what they've enabled and any customisations they've configured to align to your school policies.

4. Select Edit [Activity]   Edit

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5. Update activity information on any of the following tabs:
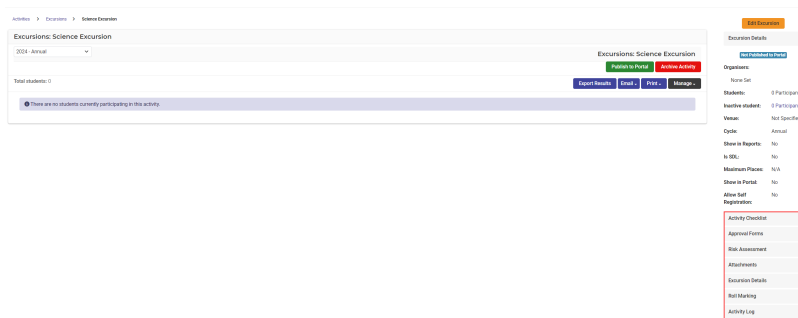
- Overview
- Costs
- Academic Reports
- Excursion
- Student Portal
- Customised Questions.

6. Select Save .

To action an activity checklist

Use these steps when the Activity Type is Excursion.
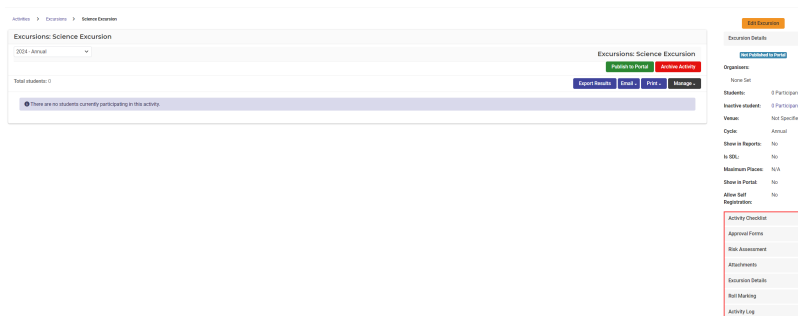
1. Open the activity.

2. Select **Activity Checklist** on the right.

3. Update one or more tasks or checklist items and select Save .

To create an approval form (if applicable)

1. Open the activity.

2. Select **Approval Forms** on the right.

3. Select Create and choose an option from the list.

4. Complete details for the online form.

5. Select Save .

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To create a risk assessment

Use these steps to if you need to create risk assessment for the activity.

1. Open the activity.

2. Select **Risk Assessment** on the right.

3. Select **Create ▾** and choose an option from the list – whether to create a new risk assessment or copy an existing one.

4. Complete details for the online form.

5. Select **Save**.

To add attachments

Use these steps if you need to add attachments to an activity.

a. Open the activity.

b. Select **Attachments** on the right.

c. Select **Attach File** .

d. In Upload File:

   a. Enter a name for the attachment.

   b. Specify whether it is visible to staff, organiser only or parents and students via the Portal.

   c. Choose the file and select **Upload**.
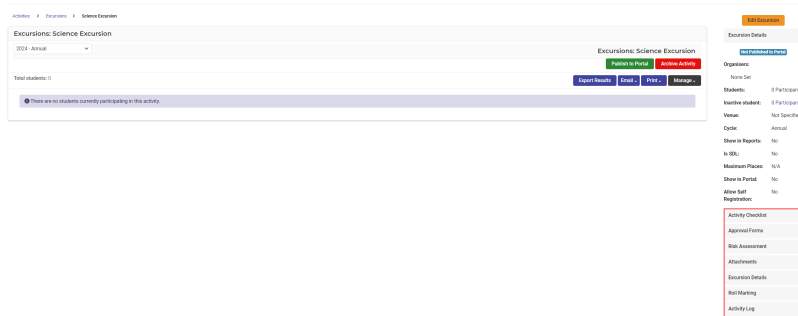
To view excursion details (if applicable):

1. Open the activity.

2. Select **Excursion Details** on the right.

3. View Departure and Return details – limited to departure and return date and time.

To view the activity log

1. Open the activity.
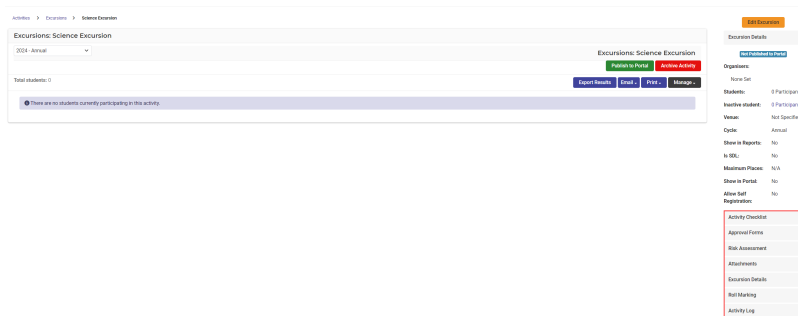
2. Select **Activity Log** on the right.

3. View the log of actions made to excursion and who performed them activity.

   The log is read only.

To create a roll for attendance tracking
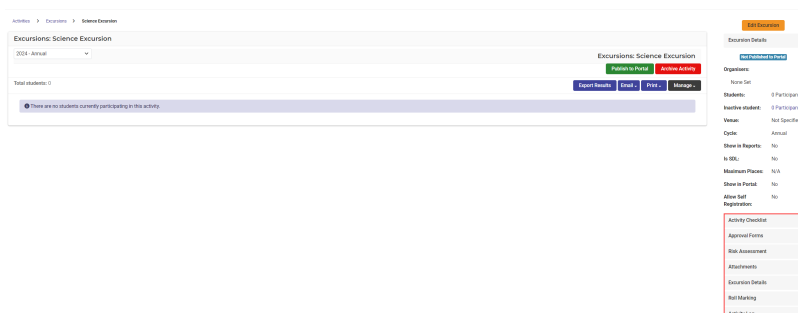
1. Open the activity.

2. Select Roll Marking on the right.

3. In Create Roll, choose whether to make the roll recurring or once-off.

4. For a once-off roll, enter and name, check the date, and select Save .

5. For a recurring roll, specify the recurrence type, the start and end dates, and select Save .

   The saved roll is available to be selected and viewed.

   The Roll screen displays flags, notes, uniform, and you can mark all as present or absent.

To mark a roll

1. Open the activity.

2. Select Roll Marking on the right.

3. Select the [activity] roll link.

4. Select ⬤▾ and choose an option from the list:

    *   Mark all selected as absent

    *   Mark all select as present.

5. Complete absence details for selected students and select Save.

    When you submit the activity roll, relevant absences are automatically created in the Attendance module, and any existing absences are updated.

    The status column ⊘ is the import from the Attendance module.

6. (Optional) Select Print Roll to print the activity roll.

To troubleshoot roll marking

Integration with Attendance: If absences were not created when you submitted the activity roll, check with your Sentral Administrator. There are two settings that they can check:

*   Activities Setup | Absence Reasons

    Activity absence reasons should be mapped to attendance absence reasons via Activities Setup | Absence Reasons.

*   Activities Setup | Settings | Activity Roll Settings | Select which absence reason should be shown when the student is present for the activity roll

    An appropriate default absence reason should be selected for when marking students as present in the activity roll.

*   Activities Setup | Settings | Activity Roll Settings | Create attendance absence on activities roll submit

    This option determines if an absence should automatically be created when an activity roll is submitted. This setting needs to be set to **Yes** for the integration with Attendance to work.

Manage attendees – student and non-student

Overview
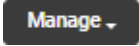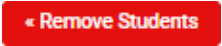
Creating an excursion or activity is just the first step. You still have to assign students and complete more workflow steps before you're ready to publish to the Portal, collect responses, and run the activity. Use the information in this section to manage attendees and complete other action items related to the activity or excursion.

To manage student attendees

> **Video:** Watch this video on our YouTube channel to learn about managing attendees. **Activities | Manage attendees, student and non-student**

Steps

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Confirm that you're viewing the appropriate instance for the activity. If not, use the dropdown list to select another option. For example, Year or Term.

4. Select **Manage▾** and choose **Manage Student Attendees** from the list.

5. Select the students who are attending the excursion/activity.

6. Under Find Students:

   a. Choose options to filter the cohort group and cohort type, and then select **Go** .

   b. Select one or more students and then select **Add Selected Students »** .

   c. Selected students are listed on the right.

7. Under Selected Students:

   a. Start typing a specific student's name and select them from the list that displays.

      The student is added to the list of selected students.

   b. Repeat this step to add more students from different cohorts.

8. To remove any students from the list, select the student and then select **« Remove Students** .

9. Select **Save**.

The activity or excursion shows the list of students. Student participant numbers display in Excursion/Activity Detail.
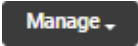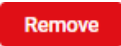
> 💡 **Tip:** Use the arrows at the top of each column to reorder the list.

To manage non-student attendees

Follow these steps to manage staff and family members who are attending the excursion or activity.

Steps

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Confirm that you're viewing the appropriate instance for the activity. If not, use the dropdown list to select another option. For example, Year or Term.

4. Select **Manage ▾** and choose **Manage Non-Student Attendees** from the list.

5. To add a staff member:

   a. Under Find Staff, start typing the staff member's name and select them from the list that displays.

   b. Use the time pickers to set start and end times.

6. To add a student's family member:

   a. Under Find Family Members, start typing the family name, look for the correct given name and relationship, and select them from the list that displays.

   b. Use the time pickers to set start and end times.

7. To delete attendees, select **Remove** next to the attendee.

8. Select **Save**.

   They will display on the activity screen along with student attendees.

Manage student points

> **Tip:** Default point values are automatically filled out the first time you specify points for an activity/instance.

Follow these steps to specify how many points a student should get for an activity and instance (if any).

1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Confirm that you're viewing the appropriate instance for the activity. If not, use the dropdown list to select another option.

4. Select **Manage ▾** and choose **Manage Student Points** from the list.

   If the activity was set up with points by your Sentral Administrator, the default amount is displayed.

5. Consider if the category was set to enforce maximum points.

   > **Example:**
   >
   > Each activity is worth 2 points. The cap is 10 points for the category. The student does 6 activities in the category. They receive 10 points for the category in total – not 12.
   >
   > Each activity is worth 1 point. The cap is 10 points for the category. The student does 8 activities in the category. They receive the full 8 points because they are below the cap.

6. Enter the values and select **Save** .

Manage custom fields
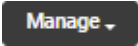
Follow these steps to specify custom fields for a student for that activity and instance (if any).
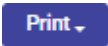
1. Select the Sentral menu icon and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Confirm that you're viewing the appropriate instance for the activity. If not, use the dropdown list to select another option.

4. Select **Manage ▾** and choose **Manage Custom Fields** from the list.

5. Complete fields for one or more students and select **Save** .

Manage permission responses

Follow these steps to manage permission responses that you may be required to collect from attendees for an activity.

> 💡 **Tip:** The best time to review this area is once the activity has gone live.
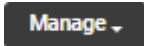
By default, the flag is set to **No** or **Unknown** as not all activities need to use flags.

- If the Paid Amount is left empty and the Paid Option is set as Yes, then the system assumes this activity is fully paid.
- If the Paid Amount has been set and Paid Option is set as Yes, then the system assumes this activity is partially paid.

> ▶ **Video:** Watch this video on our YouTube channel to learn about managing permission responses. **Activities | Manage permission responses**

Steps

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:
   a. Open the activity.
   b. Search for the activity.

   For more, see To edit a school activity

3. Confirm that you're viewing the appropriate instance for the activity. If not, use the dropdown list to select another option.

4. Select **Manage ▾** and choose **Manage Permission Responses** from the list.

   The flags are built-in, meaning that they're always there rather than being configured by your Sentral Administrator. However, you won't always need to use them for an activity or excursion, which is why the default settings are No or Unknown.

5. Select filter options and select **Ok** .

6.
> 💡 **Tip:** Viewing permission and payment statuses is useful when you need to find the list of students who have yet to pay.

7. Do any of the following:

    a. Select the appropriate option for Attending.

    b. If the activity required payment:

        i. Select **Yes** or **No** for Paid.

        ii. Either leave the paid amount empty or enter an amount.

> ⚠️ **Warning:** Warning: If this activity has been published to the Portal and permissions and payments made, you can't alter the options.

8. Select **Save**.

View parent responses for an activity

Overview

Use these steps to view responses to Activity questions published via the Portal.

Steps

1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select Activities.

    The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the activity.

    For more, see**"To edit a school activity" on page 11**

3. View the list of attendees.

4. Check the Responses column.

5. Select **Export Results** .

    Results are exported to an Excel file.

To export parent responses for an activity

Use these steps to view responses to **Activity questions** published via the Portal.

1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select Activities.

    The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the activity.

    For more, see**"To edit a school activity" on page 11**.

3. Select **Export Results** .

    Results exported to an Excel file include parent responses to questions.

To export a list of students from an activity

> ▶ **Video:** Watch this demo on our YouTube channel. **Activities | How to export a list of students from an activity**
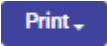
1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select Activities.

    The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the activity.

    For more, see **"To edit a school activity" on page 11**

3. Select **Print ▾** and choose **Export Students**.

   The list of students is exported to an Excel file.

To manage the display of activities on reports

Use the information in this section to show or hide activity participation on a student's report.

> **Note:** You can also use the Edit Activity function to not show an activity in reports. See **"Stage 4: Enter Academic Reports information" on page 9**

Steps

1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select Activities.
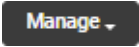
   The Activities home screen displays.

   > **Video:** Watch this demo on our YouTube channel. **Activities | How to export a list of students from an activity**

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Select **Manage ▾** and choose **Manage reports**.

4. Activity participants are listed with the Show checkboxes selected.

5. Use the checkboxes next to participants to show or hide activity participation on their reports.

6. Select **Save**.

Manage letter templates

Overview

Use the information in this section to print activity information and permission note letters to send to parents. If a template exists, you can preview and edit a letter.

Steps
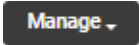
> ⚠️ **Warning:** The activity organiser may need to complete the approval steps before letters are sent.

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

   > ▶️ **Video:** Watch this demo on our YouTube channel.
   >
   > **Activities | How to export a list of students from an activity**

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Select **Manage ▾** and choose **Manage Letter Templates**.
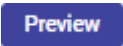
4. In Manage Letter Templates, select **New Template**.

5. Enter a name for the template, select the template type, and then select **Add**

   The Base template's content pre-populates this activity template. Base templates are defined in Activity setup to be shared across all the activities.

   > ⚠️ **Warning:** Warning: If you select none, the letter template is blank and you have to build it from scratch.

6. Complete the Top Content (first half of page) and Bottom Content (second half of page) sections.

   a. Use the menu options within each section to select merge fields for the letter.

   b. Select **Preview** to check the layout.

7. Select **Save**.

SENTRAL

Manage printing

Use the information in this section to manage printing within the activity/excursion once it is approved and live.

To print rolls

> **Video:** Watch this demo on our YouTube channel.
> **Activities | Print rolls for an activity**

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

    The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the activity.

    For more, see **"To edit a school activity" on page 11**

3. Do one of the following:

    a. Select **Print ▾** and choose **Print Roll**.

    b. Select **Print ▾** and choose **Print Today's Roll**.

4. In Print Roll options:

    a. Select the additional items to be included on the roll.

    b. Specify the student list order.

    c. Select the flags to show.

    d. Select filtering options.

    e. Select Generate roll.

        The roll is generated.

5. Do any of the following:

    a. Select whether to view the roll in the browser window or download the report.

    b. Download, save or print the roll.

To print medical information

> **Video:** Watch this demo on our YouTube channel.
> **Activities | Print medical information**

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

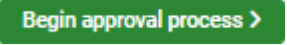   The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the activity.

    For more, see **"To edit a school activity" on page 11**

3. Check that the correct instance is selected. If not, select another option from the list.

4. Select students for whom you want to print medical information.

5. Select [Print ▾] and choose **Medical Information**.

   A summary of medical information for the selected students is generated in a new browser window.

6. Do any of the following:

   a. Print a hard copy.

   b. Save to PDF.

To print letters

Video: Watch this demo on our YouTube channel.

Activities | Print letters for activities

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Check that the correct instance is selected. If not, select another option from the list.

4. Select [Print ▾] and choose **Print Letters**.

   Active students display with a tick next to their names. This means they will get a letter generated for them.

5. Use the checkboxes to deselect students if you do not want to print a letter for them.

6. Select an option from the Letter Template list.

7. Select **Print**.

8. Do any of the following:

   a. Select whether to view the roll in the browser window or download the report.

   b. Download, save or print the roll.

SENTRAL

To export a list of students from an activity

> **Video:** Watch this demo on our YouTube channel.
>
> **Activities | How to export a list of students from an activity**

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:
   a. Open the activity.
   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Check that the correct instance is selected. If not, select another option from the list.

4. Select **Print ▾** and choose **Export Students**.

   The list of students in the activity is downloaded to your computer as a CSV file.

To email students and parents

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:
   a. Open the activity.
   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Check that the correct instance is selected. If not, select another option from the list.

4. Select **Email ▾** and choose one of the following options:
   - All Students
   - Preferred Contacts
   - Preferred Contacts and Students.

   Your default email provider opens.

5. Prepare and send the email.

Manage approval workflows

Overview

Approval workflows for activities and excursions get created in Activities Setup by your Sentral Administrator.

Your Sentral Administrator:

- structures approval workflows to ensure all aspects of activities get completed before they're run
- assigns authorised staff members as approvers. Each stage may require a different staff member to approve.

> (i) **Note:** Your school may have approval workflows that differ by activity category.

Permissions

Your permissions determine what you can see:

- If you're an Approver/Executive level user assigned to authorise the activity at various stages, your view of the workflow screen includes buttons that allow you to approve or reject a step in the workflow.
- If you're an organiser or teacher, you'll only see the workflow status.

To view approval workflow status and begin approval process

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see

3. Check that the correct instance is selected. If not, select another option from the list.

4. Check the workflow status at the top of the screen.
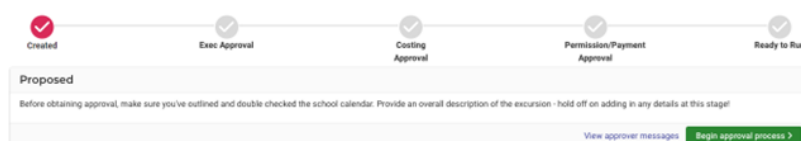
5. Select [Begin approval process >] to initiate the approval process.

   This allows users to create an activity and add necessary details over the time before submitting for approval.

To approve an activity workflow

If you have permissions, follow these steps to approve, reject an approval workflow stage, or request more information.

> (i) **Note:** Creating and saving an activity does not automatically trigger the approval process.

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1. First, open the activity, view the approval workflow status and begin the approval process.

    The Activities home screen displays.

    For more, see **"To view approval workflow status and begin approval process" on the previous page**

2. Checke the workflow status at the top of the screen.
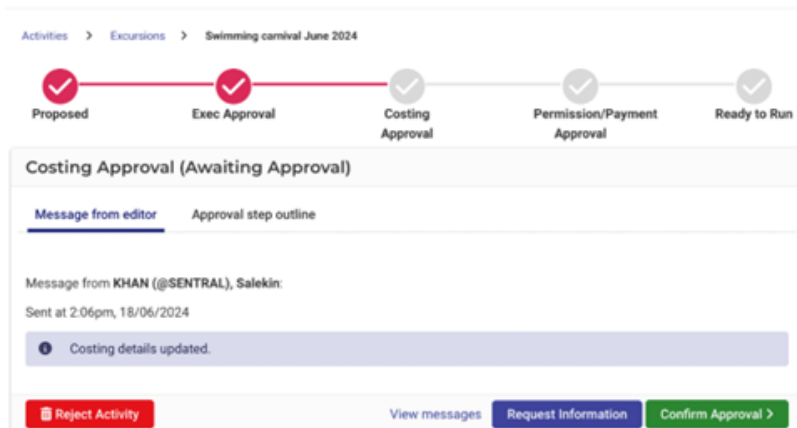
3. Review information about the activity workflow stage, and then select one of the following options:

    Once you approve the current stage, the next stage becomes available and the status indicator shows the current stage as complete.

    Assigned approvers receive a notification via the dashboard to action an approval or acknowledge a stage was approved.

    If you reject a stage, a text box displays for you to add a comment for the organiser. Once rejected with a note, the activity moves back to the first stage, and the organiser needs to trigger the approval process from the beginning.

    The organiser receives a notification with the comment visible so that they can discuss or complete the steps required to get approval.

    If you request more information, a text box displays for you to add a comment for the organiser. Once more information is requested with a note, the activity stays at the current approval stage, and the system allows organisers to make necessary changes (as requested) and send the activity back to the approver(s) for approval.

    The organiser receives a notification with the comment is visible so that they can discuss or complete the steps required to get approval.

> **Note:** Once all stages are approved, the organiser communicates to parents and students using Print Letters, Email, or the portal.

Publish a form to portal

Overview

Your Sentral Administrator may have set up an activity category designed around form completion. This allows you to make forms the activity, with students assigned to the 'activity' as attendees, which you can then publish to the portal.

Use the information in this section if your school uses the Parent Portal and you want to publish to the portal.

> **Video:** Watch this demo on our YouTube channel to learn about publishing a form to the Portal
> **How to publish a form to portal**

Steps

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Confirm that you're viewing the appropriate instance for the activity. If not, use the dropdown list to select another option. For example, Year or Term.

4. Select **Publish to Portal** .

   The Publish to Portal screen displays.

5. Complete information required for publishing:

   a. Specify whether to show start and end times.

   b. Specify whether to ask parents for permission, payment, permission and payment, or publish as information only.

      If you select either Payment Only or Permission & Payment, then information displays to indicate students for whom a new invoice fee will be created and students for whom an existing invoicefeepayment request will be published to the Portal.

   c. If relevant for the activity/excursion, complete cost details.

   d. If relevant for the activity/excursion, complete due date details for permission and payment.

   e. If relevant for the activity/excursion, select a venue option.

   f. (Optional) Enter event details.

   g. Select **Publish** .

   Once published, the Unpublish from Portal button displays. If you're an organiser, this allows you to make amendments and republish.

   Parents receive a newsfeed item with a Requires Action prompt to complete permission or payment. This updates the Manage Permission Responses for that activity. Parents view details and complete.

Tip: If you unpublish an activity, the following changes apply:

1. The activity will no longer be able to accept parent responses or payments from parents.
2. Existing permission responses will be removed.
3. Parents who paid for this activity will be notified via email.
4. Existing answers to the customised questions will be removed.
5. If a refund is required, this needs to be manually processed.

SENTRAL

Archive activities

Overview

Use the information in this section to archive activities that are no longer required.

> **(i) Note:** This does not delete the activity. You can still access all archived activities.

There are two ways to archive an activity:

- Bulk archive
- Individual activity archive.

To bulk archive an activity

1. Select the Sentral menu icon ⚹⚹⚹ and then under Student Admin, select Activities.
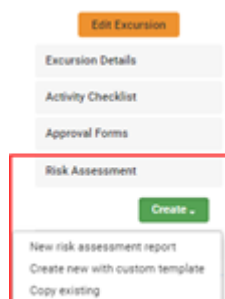
   The Activities home screen displays.

2. In the left menu, select the activity category, and choose **All**.

   The activities/excursions in the category are listed.

3. Select checkboxes next to the activities/excursions to be archived.
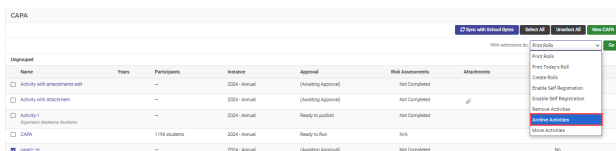
4. Select **Archive Activities** from the dropdown list and select [Go] .

To archive an individual activity

1. Select the Sentral menu icon ⚹⚹⚹ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Check that the correct instance is selected. If not, select another option from the list.
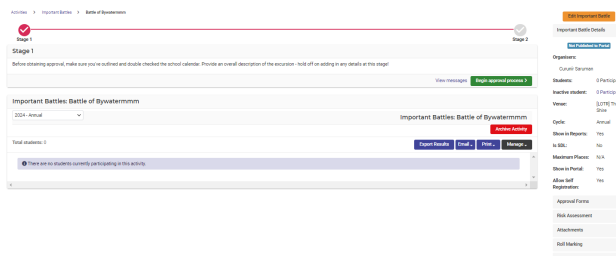
4. Select [Archive Activity] .
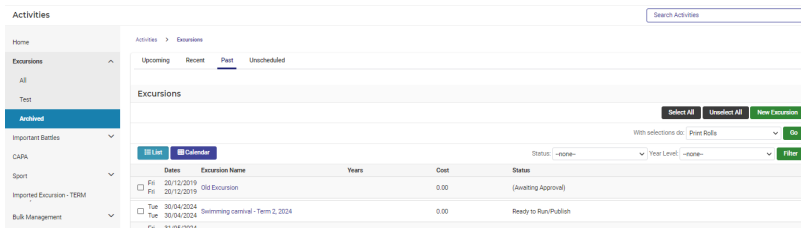
To access archived activities

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. In the left menu, select the activity category, and choose **Archived**.

   Archived activities/excursions for the selected category are listed.

Use the student view

Overview

Use the information in this section to view activity information about just one student.

Search for a student and add them to an activity

1. Select the Sentral menu icon ⚏ and then under Student Admin, select **Activities**.

   The Activities home screen displays.

2. Start typing a student's name in the search box and select from the options displayed.

   The Activities screen for the selected student displays.
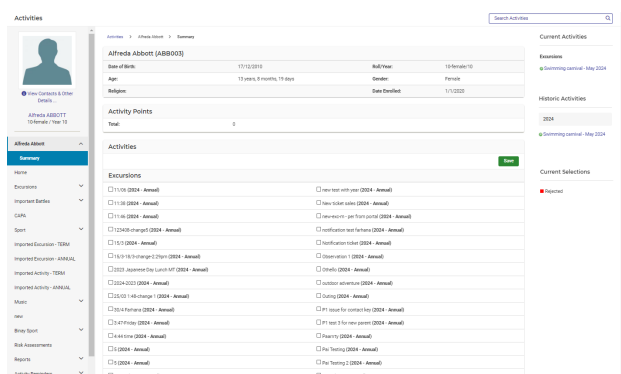
3. View current activities and historic activities in the right pane.

4. View activities listed by category.

5. To add the student to an activity:

   a. Select the checkbox next to the activity.

   b. Select **Save**.

      The Current Activity list on the right is updated.

      Organisers can view Portal Activity responses for the selected student.

      The student's selections and approval status display under Current Selections on the right.

To approve a student's activity selection

1. Select the Sentral menu icon ⚏ and then under Student Admin, select **Activities**.
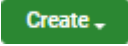
   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the student and then select the activity.

   c. Search for the activity.

   For more, see **"To edit a school activity" on page 11** or **"Search for a student and add them to an activity" above**

3. Check that the correct instance is selected. If not, select another option from the list.

4. Within the activity, select **Manage ▾** and choose **Manage Selections**.

To view activity points for a student

1. Select the Sentral menu icon ⣿ and then under Student Admin, select **Activities**.

    The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the student and then select the activity.

    c. Search for the activity.

    For more, see **"To edit a school activity" on page 11** or **"Search for a student and add them to an activity" on the previous page**

3. Check that the correct instance is selected. If not, select another option from the list.

4. View information in the Activity Points section.

    This displays Total Points earned as well as those earned by category.

    If a point cap has been set, the calculation should enforce that for:

    -   categories
    -   total.

    If no point cap has been set, the points can accumulate indefinitely.

View portal activity responses

Use the information in this section to view responses from the Parent Portal related to published activities.

1. Select the Sentral menu icon ⣿ and then under Student Admin, select **Activities**.

    The Activities home screen displays.

2. Do one of the following:

    a. Open the activity.

    b. Search for the student and then select the activity.

    c. Search for the activity.

    For more, see **"To edit a school activity" on page 11** or **"Search for a student and add them to an activity" on the previous page**

3. Check that the correct instance is selected. If not, select another option from the list.

4. View information in the Responses column.

5. Select View Response next to a student.

6. View information for the selected student in the Provided responses section.

Complete risk assessment report

Overview

Use the information in this section to complete a risk assessment report for an activity. The risk assessment report gives you the opportunity to identify potential hazards, evaluate risks and implement controls.

There are two ways you can add a risk assessment report to an activity:

• New risk assessment report

   This option is an out-of-the-box pre-configured template that allows you to add some optional components when you construct a risk assessment report.

   This easy to use template is available for NSW DoE and other states.

• Create new with custom template
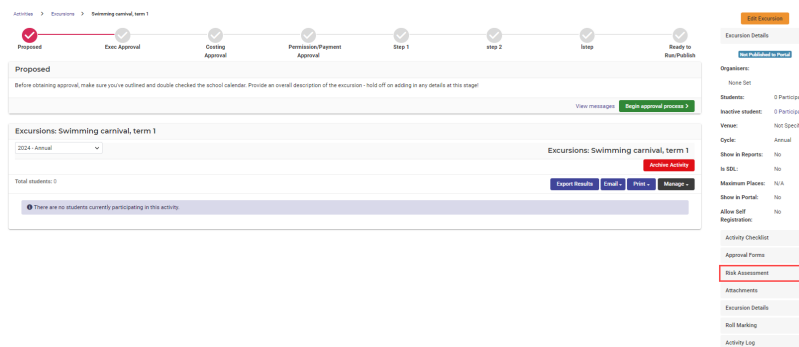
   This option is completely customisable. Use this template if you need additional component options for the risk assessment.

Create a report

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Open the activity.

3. Under Edit Excursion on the right side:

   a. Select **Risk Assessment**.

   b. Select [Create ▾] Create and choose **New risk assessment report** from the menu options.

4. In New Risk Assessment Report, enter a name for the report and select **Save** .

The Risk assessment report screen displays, and you can start adding hazards/risks.
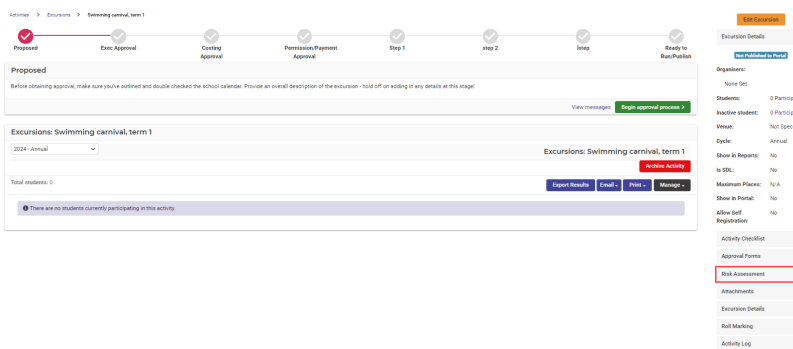
> **Note:** Note: Take advantage of our out-of-the-box pre-configured risk matrix to add a risk rating. Use the Print button to generate a report in PDF format.
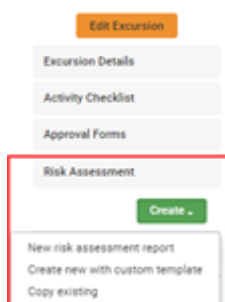
5. Select **⊕ Create Hazard** to add a new hazard/risk.

6. Complete the necessary details, including the risk rating, and then save your changes.

The hazard/risk displays in the risk assessment screen.

Create with custom template

1. Select the Sentral menu icon and then under Student Admin, select Activities.

The Activities home screen displays.

2. Open the activity.

3. Under Edit Excursion on the right side:

   a. Select **Risk Assessment**.

   b. Select **Create** Create and choose **Create new with custom template** from the menu options.

4. In New Risk Assessment

   a. Enter a name.

   b. Select one of the templates from the dropdown list

   c. Select **Save** .

5. Complete the necessary details, and then save your changes.

Copy an existing report

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Open the activity.

3. Under Edit Excursion on the right side:

   a. Select **Risk Assessment**.

   b. Select **Create ▾** and choose **Copy existing** from the menu options.
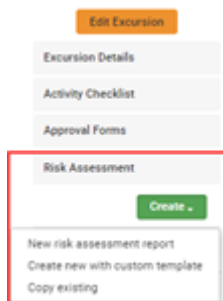
4. In Copy Risk Assessment:

   a. Enter a name for the risk assessment.

   b. Select one of the existing risk assessment reports or custom templates from the list.

   c. Select **Save** .

SENTRAL

Create reports
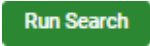
Overview

The Reports function gives you the option to search and export information related to activity categories, types, year groups, student sections etc.

The report types include:

- Activity

  Run a report on an activity type. Filter by other criteria to run a search on specific parameters down to the student level

- Activity Outcomes

  Search and export outcomes associated with the activities that have been created

- Student Selections

  Display student selections by a cycle

- Student Points

  View total points each student obtained during a School Year

- Activity Attendance

  View the attendance for a student against their activities

- Custom

  Create a report that does not match the above report types.

Run a report

1. Select the Sentral menu icon ⣿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Select Reports in the left menu and choose a report type.

3. Select options to run the report against.

4. Select **Run Search** .

   Search results display.

5. Select **Export** to export results to a CSV file.

SENTRAL

View activity risk assessment

Overview

Use the information in this section to view the risk assessment for an activity.

Steps

1. Select the Sentral menu icon ⠿ and then under Student Admin, select Activities.

   The Activities home screen displays.

2. Select Risk Assessments in the left menu.

3. View the list of risk assessments.

4. Select an activity link to view the risk assessment.

SENTRAL

Manage activity reminders

Overview

Use the information in this section when you need to send reminder notifications to parents for payments or permissions requests.

> **Note:** Access s restricted to the users who created the activity or for the relevant group or administrator.

Steps

1. Select the Sentral menu icon ⠿ and then under Student Admin, select **Activities**.

   The Activities home screen displays.
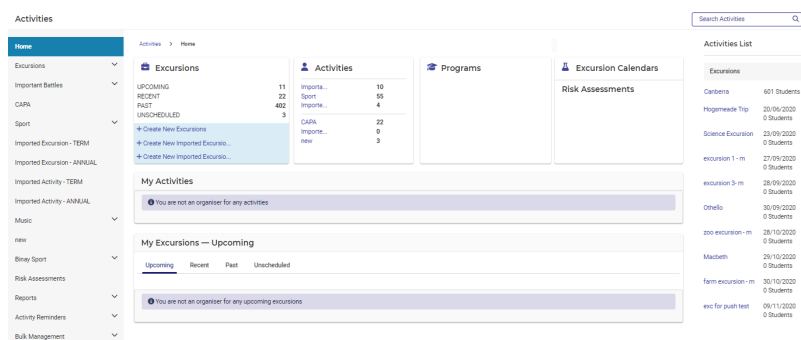
2. Select Activity Reminders in the left menu and choose **Excursions**.

3. View the list of upcoming activities and summary information about permission and payments received.

4. Select one or more activities and then select one of the parent reminder buttons – for permission or payment.

   A confirmation screen displays.
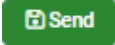
5. Under Mail Type, specify whether to send the reminder via email and/or Portal.
   - If email, select a template.
   - If Portal, complete the feed notification message and select Yes to send a push notification to the App.
6. Select one or more students to receive the reminder.
7. Select **⊡ Send**.

Change venues using bulk management

Overview

Use the information in this section to change venues for an activity.

Steps

1. Select the Sentral menu icon ⠿ and then under Student Admin, select **Activities**.

   The Activities home screen displays.
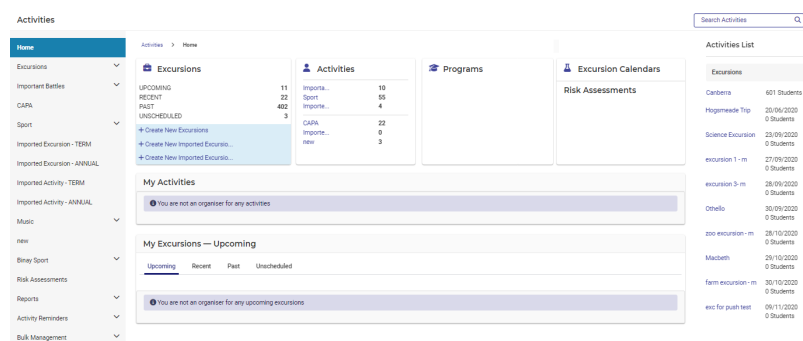
2. Select Bulk Management in the left menu and choose **Change Venue**.

3. Select the date range (start date and end date).

4. Select venue to change

   > ℹ️ **Note:** Venues should be sourced from the Venues Register in the Activities Setup.

5. Select the replacement venue

   > ℹ️ **Note:** Venues should be sourced from Venues Register in the Activities Setup.

6. Select **Proceed**to confirm the change request.

SENTRAL

Send workflow messages

Editors/organisers

Activity editors/organisers can send messages to the next approvers while they are:

- beginning an approval process
- responding to the requested information by an approver
- reinitiating an approval process after an activity has been rejected.

Approvers

Approvers can send messages to editors/organisers while:

- rejecting an activity

- requesting more information.

Editors, organisers and approvers

Editors, organisers and approvers can view all messages from the Activity dashboard by selecting the View messages link.

Editing an activity

Edit during approval enabled

You can edit an activity at any time before publishing if the 'Editing during approval' setting in the approval workflow was selected when the activity was created, and you have permissions.

Editing during approval disabled

If the above setting is deselected – meaning there is no tick in the checkbox, then editing is restricted.

You cannot edit some sections of the activity unless:

- approval process hasn't started
- approver requested more information
- approver rejected an activity.

> ℹ️ **Note:** This option restricts users from making any major changes while the activity is awaiting approval. If a change is made, the system will automatically force the activity approval workflow to start from the beginning.

To edit an activity during approval workflow

Use the information in this section to edit an activity. You need permissions to perform this task in Sentral.

1. Select the Sentral menu icon ⋮⋮⋮ and then under Student Admin, select Activities.
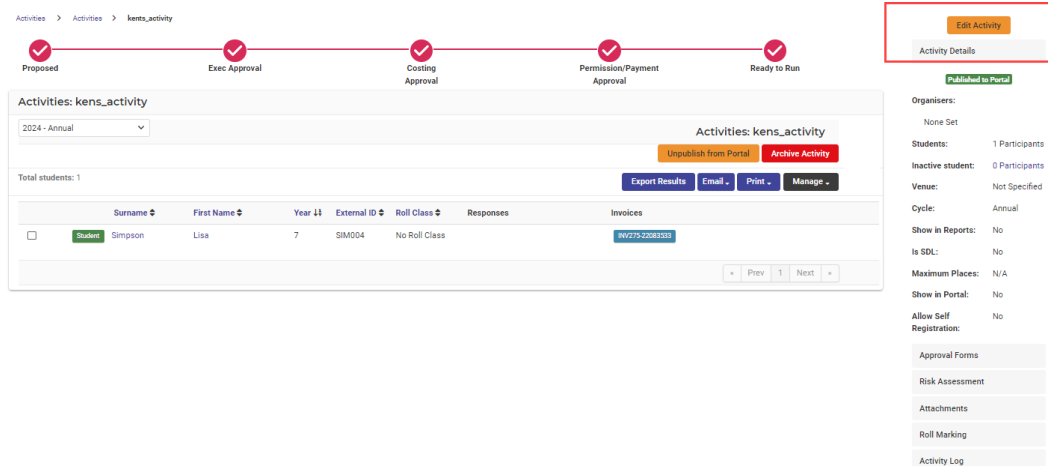
   The Activities home screen displays.

2. Do one of the following:

   a. Open the activity.

   b. Search for the activity.

   For more, see **"To edit a school activity" on page 11**

3. Check that the correct instance is selected. If not, select another option from the list.

4. At the top-right, above the activity or excursion details, select **Edit Activity** .

The button label differs depending on your school's configuration. For example, the button label may be Edit Activity, Edit Excursion, Edit CAPA.

> **(i)** **Note:** Any changes affecting the activity permission slip may require the activity workflow to start from the beginning, unless the Edit during approval checkbox was selected when the Approval Workflow used for the activity was set up. This setting is found via Activities Setup | Setup | Approval Workflow.

5. If the 'Editing during approval' setting in the approval workflow was selected when the activity was created, you can edit the activity at any time before publishing.

6. If Editing during approval is disabled, meaning there is no tick in the checkbox, then editing is restricted.

    You cannot edit some sections of the activity unless:

    - approval process hasn't started
    - approver requested more information
    - approver rejected an activity.

    > **(i)** **Note:** Once all stages are approved, the organiser communicates to parents and students using Print Letters, Email, or the portal.

    The screen capture below shows a list of activity data fields that can be modified any time during the approval process without impacting the approval workflow – meaning that the activity approval workflow will not start from the beginning.

    > **(i)** **Note:** These data fields can also be modified after publishing an activity to the Parent Portal.

7. Once you've updated activity details, select **Save** .

Copy activities

Overview

Sentral provides 'Copy' functionality that allows schools to copy existing activities. This functionality copies all activity details, including customized questions. Schools also have the option to copy student and staff attendee information. Please note that any additional documents (e.g., attachments, academic reports, risk assessments, and approval forms) will not be copied and must be added separately.
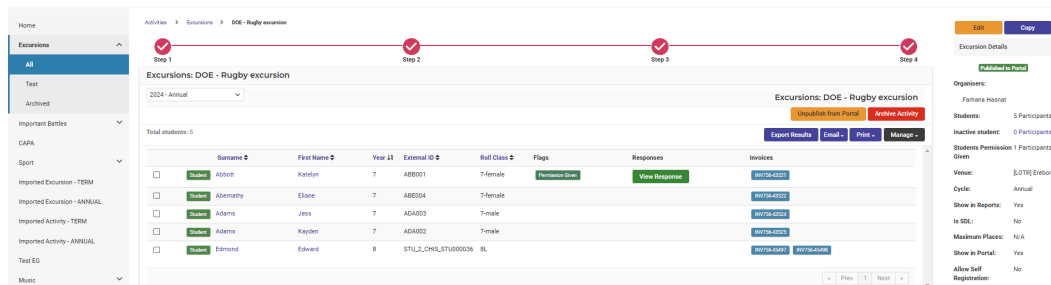
Steps

1. Select the Sentral menu icon ⠿ and then under Insights, select Activities.

   The Activities home screen displays.

2. From the search box located in the top-right corner, type and select an activity name that is linked to a teaching group.

   Alternatively, you can select a specific category from the left menu, view all activities within the selected category, and then select an activity.
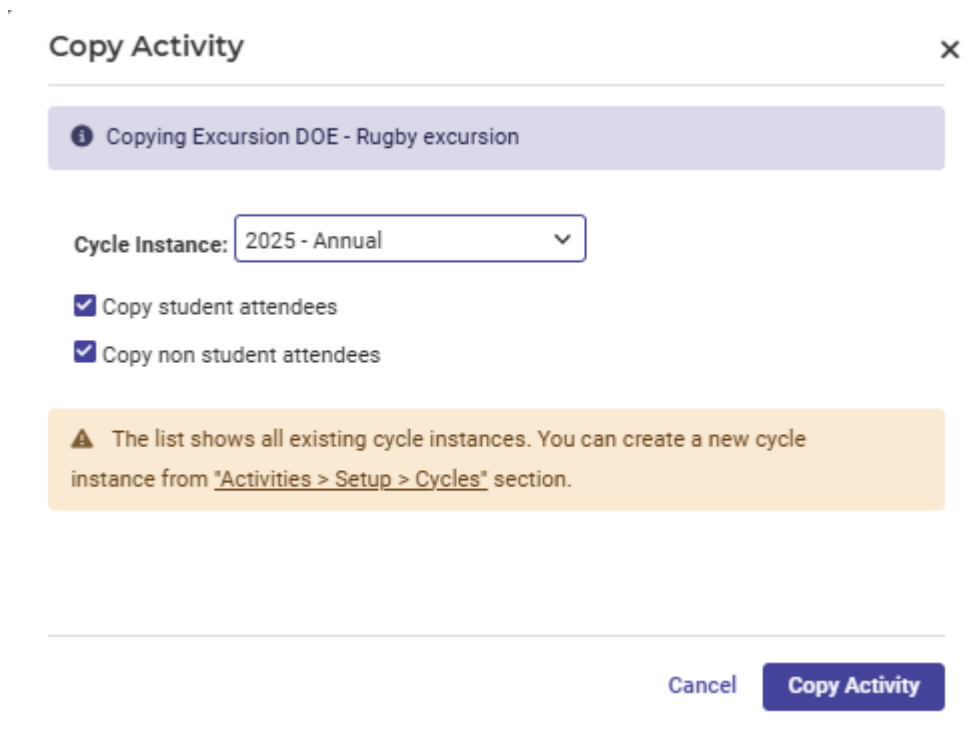
3. Select Copy from the activity dashboard.

4. Select a future cycle instance from the dropdown.

   The dropdown list shows all existing cycle instances. You can create a new cycle instance from Activity Setup | Cycles section.

5. Select Copy Activity.

    The Activity Edit screen displays.

6. Select a Start and End Date. Also make necessary changes to information in other fields if required.

7. Select Copy.

    Sentral will sync activities that are created against a category with a nominated Group Type back to NSW DoE's system.