# End-User Training for the SACS Web System

# Agenda

April 21, 2022

8:30am – 12:00pm

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| **SECTION** | **Topic/Discussion Items** | **Resources** |
| **Introduction** (20 min)**End at 8:50** | AgendaIntroduction to SACS Web* No Change: SACS account code structure (CSAM) ∙ Data file specs (import/export) ∙ Forms ∙ Certifications
* New: User Login with assigned Entity and Role(s) ∙ Datasets (draft/submission) ∙ Multi-user Access ∙ Workflow

 Entity/Role(s) govern access (view/workflow activities) Multi-user access allows workflow (Lock/Save)* Consolidates Desktop Software, Maintenance (table updates), Charter School Alternative Form, and E-transfer (COE 🡪 CDE)
* Effective FY 2022-23 (2021-22 Unaudited Actuals reported in desktop software) – no preloaded historical data

Quick Tour* Menu: Dashboard (**3-5**) ∙ Import (**2**) ∙ Users (**1**) ∙ Queues (**6**) ∙ Tools
	+ Dashboard: Submissions (Draft & Official)
	+ Submission Navigation Pane
* User Profile: (**1**) Edit Profile ∙ Help Desk ∙ Log Out (upper right)
 | Agenda[SACS Web](https://sacs-cde.org/security/login) (Chrome)[Training Materials](https://www.sites.google.com/view/sacscoetraining)[SBCEO: SBAS SACS Webpage](https://www.sbceo.org/domain/284) |
| **1****Application Security**(40 min)**End at 9:30**  | User Account + Roles and Permissions* Entity: One or more
* Roles: Public ∙ Edit Draft Dataset ∙ Edit Dataset ∙ Dataset Approval ∙ Oversight ∙ User Management ∙ Administration

Logging In & Managing Your Account (Menu > User Profile)* Logged out after 30 mins of inactivity; **(!)** Save
* Locked after 5 failed attempts to login
* Inactive once password has expired for 1 year
 | 1a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.wceht87yc6k2)1b. [Application Security Quiz](https://docs.google.com/forms/d/e/1FAIpQLSdfMXF0F00-ekUkk_aPPvTazKTiSeqXcm0fGxRsQm-3_gSvAA/viewform?usp=sf_link)1c. [Exercise 1: Personal Account Mgmt](https://www.sites.google.com/view/sacscoetraining#h.21nbpa8bogq1)  |
|  | LEA User Manager* LEA Administrator/User Manager 🡪 Charters & LEA Users
* View/Manage SACS User Accounts (Menu > Users)
* [Add Users & Assign Roles](https://sbas.sbceo.org/Escape/SACSUserSetupInstructions.pdf) – 2 step process **(!)** Save

 For updates to take effect…Update > Save > Log out Assign at least one user in each role * Establish local policy for how users are established/roles assigned and documentation maintained
 | 1d. [Exercise 8: User Management](https://www.sites.google.com/view/sacscoetraining#h.qq82xyek2vfv)1e. [SBCEO: LEA Admin/User Mgr Tools](https://www.sbceo.org/domain/284) SACS User Role Assignment Forms, How to Add Users & Assign Roles, User Role Matrix, Sample Org Charts |
| **2a****Data Import**Create a New Submission(20 min)**End at 9:50** | Import data file (Menu > Import)* Select year from Fiscal Year Menu (upper right)
* Single Import: Select Type of Import, Dataset Name, Reporting Period, Dataset Format; + Select File; click Upload button.
* Multiple Import: Select Reporting Period; + Select Files; Select Type of Import, Dataset Name, Dataset Type; click Upload button.

 Scroll up to view Prescan Result and Upload Log which will  indicate whether the “File Saved Successfully”**--- Dataset submission is stored in the Dashboard ---** | 2a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.run1g62j4cw2) (Slides 1-18)2b. [Exercise 2: Import & Export DAT files](https://www.sites.google.com/view/sacscoetraining#h.x277o4b9minj) |
| **3****Dashboard****(& Submission)****Tour**(15 min)**End at 10:05** | The **Dashboard** displays dataset submissions (Menu > Dashboard)* User Guide link (icon to the right of ‘Submissions’)
* Fiscal Year Menu (upper right)
* View: All ∙ Draft ∙ Official (tabs)
* Compare Two Selected Datasets & Query SACS (to the left of global filter)

 To view features, Dataset(s) must be selected (check box(es))* View Status/Details

 Filter/Sort columns (Global Filter (left); Column Selector (rt))* Copy or Delete dataset submission (Actions column)

 Copy dataset to SACS Web (Draft); Alternative is export/import* New Draft: (Menu > Dashboard > New Draft Button (upper rt) Alternative to Menu > Import function. Creates blank file for 1) Manual entry via User Data Input/Review or 2) Merge files via Import from Submission Navigation Pane.

Access **Submission** (Menu > Dashboard > Click Submission Link (CDS#))* Submission “Control Panel”: Dataset Identifier ∙ Master Buttons
* Submission Navigation Pane: Forms/Reports/Activities
* Key Information: State ∙ Assignment
 | 3a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.hw2ez8oswghw)3b. [User Interface Quiz](https://docs.google.com/forms/d/e/1FAIpQLSeGzGrbutd3xG--HRygTFPdFOzNbYeWTLPrg7onAY8N8e-IvA/viewform?usp=sf_link)3c. [Exercise 4: User Interface/Dashboard](https://www.sites.google.com/view/sacscoetraining#h.pj8vxuyi9u1f) |
| **BREAK****End at 10:15** |
| **2b****User Data Input/Review &** **Data Import (overwrite)**Update Existing Submission(20 min)**End at 10:35** | **--- Open Data Submission ---**Data Import: Overwrite Existing Data (Submission Navigation Pane > Import) **(PP20)*** **(!)** LOCK (Submission-wide); Select Type of Import, Overwrite Option (Delete Only/Delete All); + Select File; Click Upload button

User Data Input/Review (Submission Navigation Pane > User Data Input/Review) **(PP31)*** GL Form Data: Select Data Type; Sort/Filter Columns (account components, Value, Flag: I = Imported, C = Calculated, E=Editable)
	+ Select records and calculate sum
	+ Add/Modify/Delete GL Record ***only for fund*** ***with no imported data***

**(!)** LOCK (Submission-wide)Add GL Data Record button appears only once submission is lockedOnly GL records with “E” flag can be edited/deleted* Supplemental Form Data: Select Data Type; Sort/Filter Columns (Elements, Value, Actions)

 Supplemental Forms must have data view* Print/Export Submission Data

Single String Validation Tool (Menu > Tools > Single String Validation Tool) | 2a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.run1g62j4cw2) (cont’d slides 19-43)2b. See above2c. [User Data Input and Review Quiz](https://docs.google.com/forms/d/e/1FAIpQLSeQeqib2Lthggz4X0wlHpn_yjpSmMazGav0isjC49XsZjoWiw/viewform?usp=sf_link)2d. [Exercise 3: User Data Input/Review](https://www.sites.google.com/view/sacscoetraining#h.f9f43oo4h35) |
| **4****Forms**(20 min)**End at 10:55** | Forms (Submission Navigation Pane > Forms)* Funds: Expenditures by Object; Expenditures by Function; Restricted Detail (tabs)
* Supplementals: Based on LEA type and reporting period
* Criteria and Standards: Complete after Supplemental Forms and TRC; Pulls values from Form 01(i), A(i), MYP(i), CASH

Components of Ending Fund Balance/Net Position (Submission Navigation Pane > CEFB)* Designate components of ending balance by dataset/fund/resource
* Posted as GL data in database (overwrites existing designations) 🡪 forms

Internal Form Check (Submission Navigation Pane > IFC)* Stores internal form check errors from Forms
* Form specific notifications (users are prompted to resolve IFC before they leave form but do not prevent user from leaving form -- see notification)

Edit Forms **(PP13-20)*** **(!)** Lock to edit data in shaded boxes (see lock status notifications)
	+ Submission-wide Lock (Submission Control Panel > Global Submission Lock button (upper left))
	+ Form Lock: (from Form screen > Lock Form button (upper right)) Prevents users from editing same/related data on all forms
	+ Remove Locks: User can unlock by clicking Unlock Submission Button or Unlock Form Button; Override by Administrator or User Manager role
	+ View Locks (Submission Control Panel > Display Current Locks button (upper left))
* **(!)** Save (timeout 30 mins)

Print/Export to Excel **(PP23)*** Print Form (from Form screen > Export to Excel or Print)
* Print All (Submission Navigation Pane > Table of Contents (check box to select forms) > Print Selected Forms (upper rt))

Each form opens in a new window…to view, allow pop-ups Blank Forms (Menu > Tools > Blank Forms) | 4a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.q7ov1hs9x1az)4b. [Forms Quiz](https://docs.google.com/forms/d/e/1FAIpQLSfK1XuQ02iYkpYvCiVPGuReC7jQioQvWyyFT8CSVEjGlIagMg/viewform?usp=sf_link)4c. [Exercise 5: Forms](https://www.sites.google.com/view/sacscoetraining#h.e0ed4uc9rwkb) |
| **5****Technical Review Checks**(15 min)**End at 11:10** | Technical Review* Run separately for each dataset
* Import, GL, Supplemental, Export
* (F) Fatal ∙ (W/WC) Warning/Warning with Calc ∙ (O) Informational

Run TRC (Submission Navigation Pane > TRC > Technical Review) **(PP7-12)*** **(!)** LOCK (Submission-wide); Select Dataset Type, Phase, Display > Start

Review/Enter Explanation (Submission Navigation Pane > TRC > Explanations) **(PP14-19)*** **(!)** LOCK (Submission-wide); Select Data Type, Display
	+ Check Type: (F) Fatal ∙ (W/WC) Warning/Warning with Calc ∙ (O) Informational
	+ Status: (F) Fatal ∙ (P) Passed ∙ (E) Explained ∙ (W) Warning – **not explained**

 Must run TRC to see explanations* + Expand to view detail; Enter explanations; Click Save button

Print TRCs **(PP21)** | 5a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.myns2k5ad0tn)5b. [Exercise 6: Technical Review Checks](https://www.sites.google.com/view/sacscoetraining#h.kqbjrlez8y6) |
| **6****Submissions**(45 min)**End at 11:55** | Data submission and review workflow (within/across organizations)Queues (Menu > Queue)* The Queues menu provides access to submissions in different stages of the workflow **based on your assigned role(s)**

 Select correct Reporting Period to view submission in queue

|  |  |
| --- | --- |
| **Role** | **Queue** |
| Edit Draft Dataset | None |
| Edit Dataset | Edit Dataset |
| Dataset Approval | Dataset ApprovalLEA Draft Dataset Approval |

Basic LEA Workflow

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| --- | --- | --- | --- |
| **Draft Dataset** (Draft Tab) | Pending Internal Review | **Submission Dataset**(Official Tab) | Icon  Description automatically generatedPromote to Review |
| New Draft Dataset | * Visible to originator
* Independent
* 5 max per user (per FY/Entity)
 | New Data Submission | Data Entry | * Visible to entity users
* Collaborate
* 1 allowed

*To delete, return to Draft state* |

States * New Draft Dataset: Default status of new dataset

Change state to Pending Internal Review from dashboard > Save[Roles: Edit Dataset; Dataset Approval]* Pending Internal Review

Change state to New Data Submission from Queue (Menu > Queues > LEA Draft Dataset Approval > select Reporting Period > change state to New Dataset Submission > Save) [Roles: Dataset Approval]* New Dataset Submission

Change state to Data Entry from Queue (Menu > Queues > Edit Dataset OR Dataset Approval > select Reporting Period > change state to Data Entry > Save) [Roles: Edit Dataset; Dataset Approval]* Data Entry

Change state to Promote to Review (Menu > Queues > Dataset Approval > select Reporting Period > change state to Promote to Review > Save) [Roles: Dataset Approval]* Promote to Review: Dataset is now locked
 | 6a. [PowerPoint](https://www.sites.google.com/view/sacscoetraining#h.b70d7hidvnx0)6b. [Workflow Quiz](https://docs.google.com/forms/d/e/1FAIpQLSeC0vBeuYjwHJCF4VbE1OuHr_GMNiyaru0twJTu_xQe_E198Q/viewform?usp=sf_link)6c. [Exercise 7: Workflow](https://www.sites.google.com/view/sacscoetraining#h.fdltka59oqsq) |
| **Close**(5 Min)**End at 12:00** | **Questions?**Jenelle Williams, SBCEO: jwilliams@sbceo.orgFinancial Accountability & Info Svcs, CDE sacsinfo@cde.ca.gov | Helpful Tips* Permissions guide access
* Lock submission to edit/Save
* Allow pop-ups to print all
* Pay attention to notifications/alerts
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