# 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** | Agenda  Introduction 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 locked  Only 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 above  2c. [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 Approval  LEA Draft Dataset Approval |   Basic LEA Workflow   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | **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.org](mailto:jwilliams@sbceo.org)  Financial Accountability & Info Svcs, CDE [sacsinfo@cde.ca.gov](mailto: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 |