



SACS Web- User Setup Instructions

These instructions will guide you through setup of users in the Standardized Account Code Structure web-based financial reporting system (SACS Web).

A role of User Manager is required to set up users in SACS Web. SBCEO will set up **ONE** Administrator/User Manager at each LEA. Once the LEA Administrator/User Manager is established, that user will then set up the administrator/user manager for each school district-authorized charter school (if applicable) and assign additional users within the LEA, or delegate that responsibility to other user(s) within the entity by giving them the User Management role.

User setup is a TWO-STEP Process:

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Once the account is set up, the user will receive an email from DONOTREPLY@SACS-CDE.ORG with a subject line “Confirm Link” to establish a password. **The link is only valid for 24 hours.** Once link expires, navigate to “I forgot my password” from the [SACS Web](#) login page to generate a reset password email. This will allow the user to create a password. When the entity and role(s) are assigned, the user will receive another email from DONOTREPLY@SACS-CDE.ORG with a subject line “Your SACS System Profile Entity Roles have Changed”.

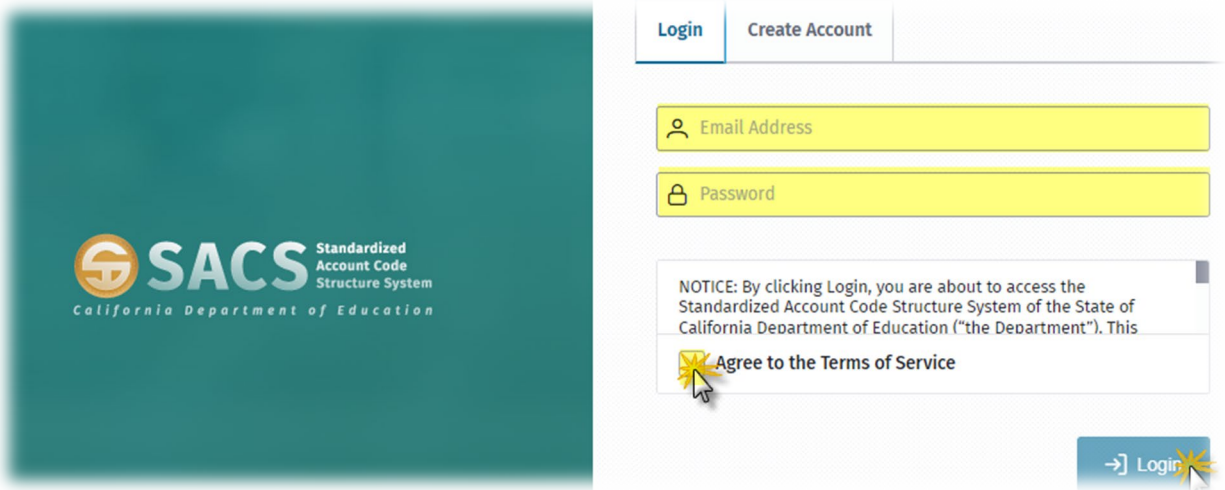
SACS Web Structure

It is each LEA’s discretion how to establish their SACS Web System user structure and user roles, and the documentation maintained. Each LEA must also communicate its local process for SACS Web access so that prospective users know what documentation to submit and who to contact for questions and/or assistance. We suggest the use of a SACS Web Access Form for internal control purposes. Setup documents should be retained at the reporting entity, they do not need to be forwarded to the COE or CDE.

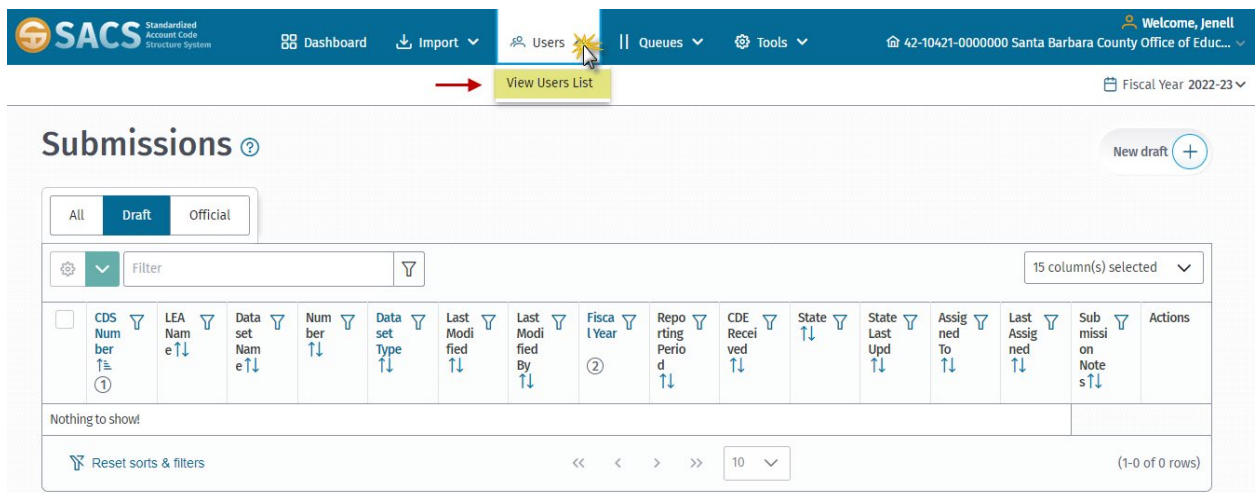
STEP 1: Add New User

The SACS Web System requires individual user access which is accomplished through the establishment of a user account within the system.

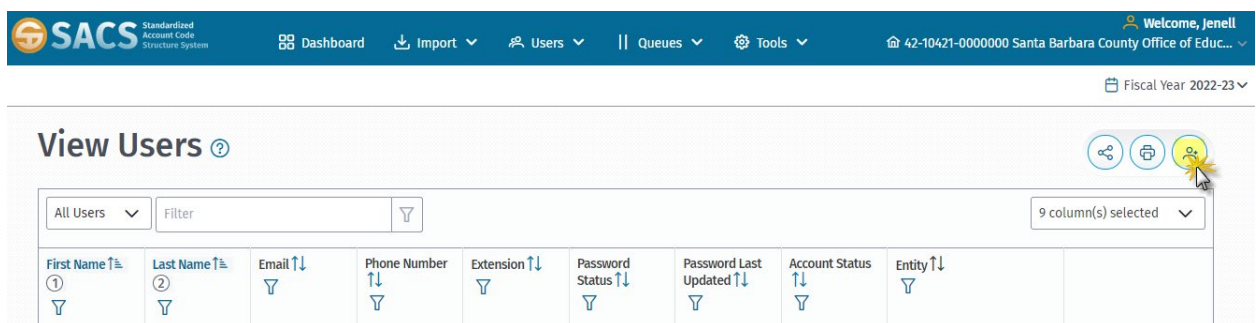
- The LEA Administrator/User Manager must login to [SACS Web](#) using Google Chrome.



- On the Main Menu, click **Users** and select **View Users List**.



- Click the **New User** button in the upper right corner.





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- Enter new user information [First Name, Last Name and Email Address]; Agree to the Terms of Service by checking the box, then click **Submit**.

The screenshot shows the SACS Web user setup interface. At the top is a navigation bar with the SACS logo and menu items like Dashboard, Import, Users, Queues, and Tools. The user is logged in as 'Welcome, Jenell'. The main form has three input fields: 'First Name', 'Last Name', and 'Email Address'. Red arrows point from a circled '1' to each of these fields. Below the fields is a 'Terms of Service' section with a checkbox labeled 'Agree to the Terms of Service' and a circled '2' next to it. A 'Submit' button with a checkmark and a circled '3' is located at the bottom right of the form.

IMPORTANT: A user account established in the system with no associated entities or roles (assigned in **STEP 2** below) will default to a **Public** role. This will allow the user to view published Unaudited Actuals and budget data for all entities. **A Public user will receive an error message when they log in to SACS Web if no reports are available.**

The screenshot shows the SACS Web Submissions page. At the top is a navigation bar with the SACS logo and menu items like Dashboard, Queues, and Tools. The user is logged in as 'Welcome, Jenelle'. Below the navigation bar are two red error messages, each with a close button (X). Below the errors is a 'Submissions' section with a question mark icon. There are three tabs: 'All', 'Draft', and 'Official'. A 'New draft' button with a plus sign is located to the right of the tabs.

A user that will access the system to develop or process financial data must be assigned roles in **STEP 2** below. →



STEP 2: Assign Entity and User Roles

Any user that will be responsible for creating, editing, reviewing, approving and/or submitting data must be assigned a reporting entity and one or more user roles. LEAs should evaluate their organizational structure to determine which staff should have access to the SACS Web System, and which roles should be assigned to those staff.

- Back on the Main Menu, click **Users** and select **View Users List**. Search for the newly added user account using the filter function . Once the correct user is located, click the **Edit User** button.

The screenshot shows the SACS Web interface with the 'Users' menu selected. A search filter 'smith' is applied. The table below shows the user list:

First Name	Last Name	Email	Phone Number	Extension	Password Status	Password Last Updated	Account Status	Entity
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active	[Redacted]
John	Smith	johnsmith@sbc.eo	[Redacted]	[Redacted]	Active	(none)	Active	[Redacted]
[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	[Redacted]	Active	[Redacted]

- On the Edit Profile page, click the **Add Entity/Role** button and select the appropriate assignments [Level (LEA type), Entity (LEA name; only LEAs within the county are available options) and Role(s)], then click **Add New**.

The screenshot shows the 'Edit Profile' page for user 'John Smith'. The 'Add Entity/Role' button is highlighted with a red arrow. A modal window titled 'Add New Entity & Roles' is open, showing the following fields:

- Level: Pick a level (dropdown menu)
- Entity: Pick an entity (dropdown menu)
- Roles: No results found (text area)

Buttons for 'Cancel' and '+ Add New' are visible at the bottom of the modal.



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- Click the **Save** button in the upper right corner.

Edit Profile ? Add Entity/Role +

User Information

First Name	Last Name	Phone Number	Extension	Email / Username
John	Smith			johnsmith@sbceo
Password Status Active	Account Status Active	Action	Password	Beta User <input type="checkbox"/>

User Entity Roles

Level	Entity Name	Roles	Actions
County Office of Education	42-10421-0000000 Santa Barbara County Office of Education	Edit Draft Dataset	✎ ✖

Undo changes << < 1 > >> (1-1 of 1 rows)

- A blue box will appear at the top of the screen indicating that the record was updated.

Edit Profile ? Add Entity/Role +

User Information

First Name	Last Name	Phone Number	Extension	Email / Username
John	Smith			johnsmith@sbceo
Password Status Active	Account Status Active	Action	Password	Beta User <input type="checkbox"/>

User Entity Roles

Level	Entity Name	Roles	Actions
County Office of Education	42-10421-0000000 Santa Barbara County Office of Education	Edit Draft Dataset	✎ ✖

- ✓ Check user setup by navigating back to view the user's profile. Ensure the **User Information** and **User Entity Roles** are correct. Make additions/edits as needed.