



APPLICATION COURSE

Introduction to SACS

SACS Application Course

Introduction

Lesson 01 – **Application Security**

Lesson 02 – *Data Import*

Lesson 03 – *Dashboard*

Lesson 04 – *Forms*

Lesson 05 – *Technical Review Checks (TRC)*

Lesson 06 – *Data Submissions*



LESSON 01 – Application Security

SACS Application Security Performance Objective

- a) User must be able to log into the SACS Application
- b) User must be able to identify user roles and the permissions associated with that role
- c) User must be able to create a user account
- d) User must be able to perform User Management roles on user accounts.



LESSON 01 – Application Security

Introduction to SACS Application Security

- The SACS application allows the user to manage permissions throughout the system to control user access per entity
- All users are required to have an account and log into the application with a username and password
 - ❖ An account not associated with an entity is considered a Public account
 - ❖ Each account which is associated with one or more entities will have one or more roles
- Each user is assigned specific levels of access (roles) by a user with the **User Management** role



LESSON 01– Application Security

| USER ROLE | PERMISSIONS | How do I Get this Role |
|-------------------------------|--|---|
| Public | Default account; ability to view budget and interim data for all entities and view published Unaudited Actuals. No assigned roles or associated entities | SELF REGISTER or User Management |
| Edit Draft Dataset | Basic data entry processes; abilities limited to draft datasets | User Management |
| Edit Dataset | Basic data entry processes across the submission | User Management |
| Dataset Approval | Ability to promote a draft dataset to the next state | User Management |
| Oversight | Review or edit a submission for which the entity has oversight responsibilities | User Management |
| Certify/Promote to CDE | Staff allowed to submit UA data and certify it; Formerly eTransfer access form users; Can only be assigned by CDE | CDE User Management |
| User Management | Manages user accounts | Administration or User Management |
| Administration | Superuser; creates administration account | CDE User Management or Administration |



LESSON 01 – Application Security

Descriptions of District/COE SACS Security Roles

To begin, it is important to know where a user gets their role(s) and who grants the access to each user.

| CDE USER ROLE |
|------------------------------|
| Analyst |
| Consultant |
| Publish |
| Lead Workflow Consultant |
| User Management |
| Help Management |
| Workflow Management |
| Administration |
| System Administration |
| Validation Table Maintenance |



CDE USER MANAGEMENT Role

CDE User Management role

- Grants Administration and User Management roles to one COE user to ultimately delegate roles to related entities (upon initial setup)



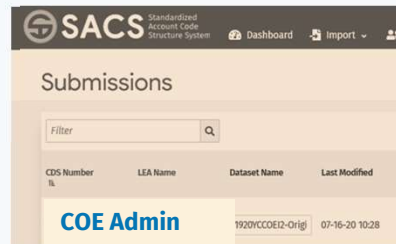
LESSON 01 – Application Security

ADMINISTRATION Role

The highest level of user (role) at the COE/District is the COE Administrator role:

- Creates other *Administration* accounts and grants other *Administration* roles
- Considered a **SUPER USER** (ability to restore a prior version of a Submission via the Version History screen and unlock a locked submission)
- **This role is not in the normal workflow for data submissions**

| USER ROLE |
|------------------------|
| Edit Draft Dataset |
| Edit Dataset |
| Dataset Approval |
| Oversight |
| Certify/Promote to CDE |
| User Management |
| Administration |



LESSON 01 – Application Security

USER MANAGEMENT Role

The manager of user roles at the entity and/or related entities:

- Creates other *User Management* accounts and grants ALL other user roles.
 - For example, COE grants User Management role to one District user upon initial setup of the system
 - In another example, District user manager creates user accounts for district staff and assigns edit draft dataset, edit dataset, and/or dataset approval roles
- **This role is not in the normal workflow for data submissions**

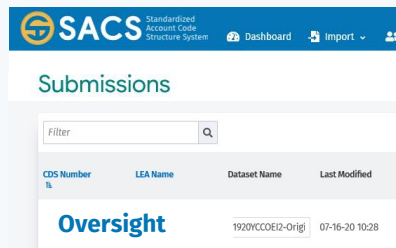
| USER ROLE |
|------------------------|
| Edit Draft Dataset |
| Edit Dataset |
| Dataset Approval |
| Oversight |
| Certify/Promote to CDE |
| User Management |
| Administration |



LESSON 01 – Application Security

OVERSIGHT Role

| USER ROLE |
|------------------------|
| Edit Draft Dataset |
| Edit Dataset |
| Dataset Approval |
| Oversight |
| Certify/Promote to CDE |



Oversight role

- 1st and 2nd Level Submission review for related entities
- Ability to reject and return submissions to the originating LEA
- Ability to edit datasets
- Ability to publish Budget and Interim submissions
- NOTE: Oversight role will also be used by districts who have authorized charter schools.



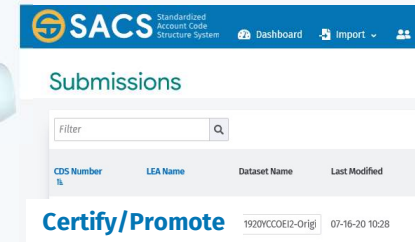
LESSON 01 – Application Security

Certify/Promote to CDE

| CDE USER ROLE |
|------------------------------|
| Analyst |
| Consultant |
| Publish |
| Lead Workflow Consultant |
| User Management |
| Help Management |
| Workflow Management |
| Administration |
| System Administration |
| Validation Table Maintenance |



| USER ROLE |
|-------------------------------|
| Edit Draft Dataset |
| Edit Dataset |
| Dataset Approval |
| Oversight |
| Certify/Promote to CDE |



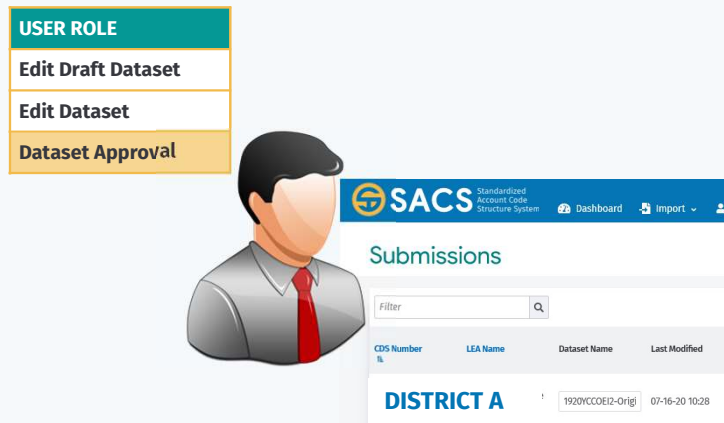
COE Certify/Promote to CDE role

- Ability to submit Request for unaudited actuals Promoter access
- Ability to promote/demote a submission to the following states:
 - Promote to Pending CDE Authorization
 - Demote to Active Submission Returned
 - Demote to Resubmission Required (if rejected by CDE)



LESSON 01 – Application Security

DATASET APPROVAL Role



The image shows a screenshot of the SACS (Standardized Account Code Structure System) interface. On the left, a table lists user roles. The main interface shows a 'Submissions' page with a search filter and a table of submission records.

| USER ROLE |
|--------------------|
| Edit Draft Dataset |
| Edit Dataset |
| Dataset Approval |

SACS Standardized Account Code Structure System | Dashboard | Import

Submissions

Filter

| CDS Number | LEA Name | Dataset Name | Last Modified |
|------------|----------|-----------------|----------------|
| DISTRICT A | | 1920VCCOE2-Orig | 07-16-20 10:28 |

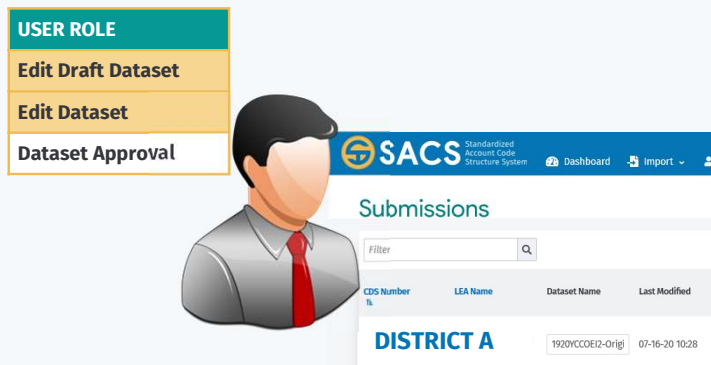
DATASET APPROVAL

- Ability to see any draft dataset submissions within the assigned entity for review and promotion to the next level
 - Ability to promote a draft dataset to submission dataset
 - Ability to promote a submission dataset to reviewing agency



LESSON 01 – Application Security

EDIT DRAFT/DATASET Role



The image shows a screenshot of the SACS (Standardized Account Code Structure System) application interface. On the left, a vertical menu lists user roles: 'Edit Draft Dataset', 'Edit Dataset', and 'Dataset Approval'. The main interface displays a 'Submissions' table with columns for 'CDS Number', 'LEA Name', 'Dataset Name', and 'Last Modified'. A search filter is visible above the table. The table contains one entry for 'DISTRICT A' with CDS Number '1920VCCOE12-Orig1' and Last Modified '07-16-20 10:28'. A user icon is overlaid on the left side of the screenshot.

| CDS Number | LEA Name | Dataset Name | Last Modified |
|-------------------|------------|--------------|----------------|
| 1920VCCOE12-Orig1 | DISTRICT A | | 07-16-20 10:28 |

EDIT DRAFT DATASET

- Basic data process abilities limited to Draft Datasets
- This role can only see datasets that are in the DRAFT state and owned by the current user.

EDIT DATASET

This role is assigned to for data entry and to allow peers to collaborate and review datasets prior to promoting to reviewing entity.

- Basic submission process abilities
- This role can promote a dataset to **Pending Internal Review** state.



LESSON 01 – Application Security

| | Public | Edit Draft Dataset | Edit Dataset | Dataset Approval | Oversight | User Management | Administration | Certify/ Promote to CDE |
|-----------------------|--------|--------------------|--------------|------------------|-----------|-----------------|----------------|-------------------------|
| District | | X | X | X | X | X | X | |
| Charter School | | X | X | X | | X | X | |
| COE | | X | X | X | X | X | X | X |
| SELPA | | X | X | X | * | X | X | |
| CDE | | X | X | X | X | X | X | |
| SBE | | X | X | X | X | X | X | |
| JPA | | X | X | X | | X | X | |

* SELPA Oversight role is still under evaluation



LESSON 01 – Application Security

Adding a New User (Step 1 of 2)

1. Click New User Button

2. Enter User Information

3. Click Submit



LESSON 01 – Application Security

Adding a New User (Step 2 of 2)

The screenshot displays the SACS (Standardized Account Code Structure System) interface. The main page is titled 'Edit Profile' and shows user information for 'EmanuelLEA'. A red box highlights the 'Add Entity/Role' button in the top right corner, labeled with a '3'. A central text box contains the following instructions:

Editing, adding, or deleting roles associated with an account

1. Click the **EDIT ENTITY ROLES** button to open the Entity Roles dialog box
2. Add or Delete roles for the account
3. Save Changes

Below the instructions, a red box highlights the 'Edit Entity Roles' button on the user profile card, labeled with a '1'. Another red box highlights the 'Edit Entity & Roles' dialog box, labeled with a '2'. This dialog box shows the following details:

- Level: School District
- Entity: 57-72894-0000000 Washington Unified
- Roles: Administration, Dataset Approval, Edit DataSet, Edit Draft DataSet, Oversight, User Management

The dialog box has 'Cancel' and 'Update' buttons at the bottom. A red box also highlights the 'Update' button, labeled with a '2'. The 'Edit Entity Roles' dialog box is shown with a list of roles, including 'Administration' and 'Dataset Approval', and an 'Edit Entity Roles' button next to it, labeled with a '1'.



LESSON 01 – Application Security

Password Rules

- To setup a password
 - Password strength **must** meet the following criteria to be considered **STRONG**.
 - At least **8 characters** in length
 - Not be the same as email
 - At least one uppercase letter (**A-Z**)
 - At least one lowercase letter (**a-z**)
 - At least one number (**0-9**)
 - At least one special character (**!@#\$%^&*-=_+?**)

Enter New Password

Enter new password

4

Strong

Cancel Submit

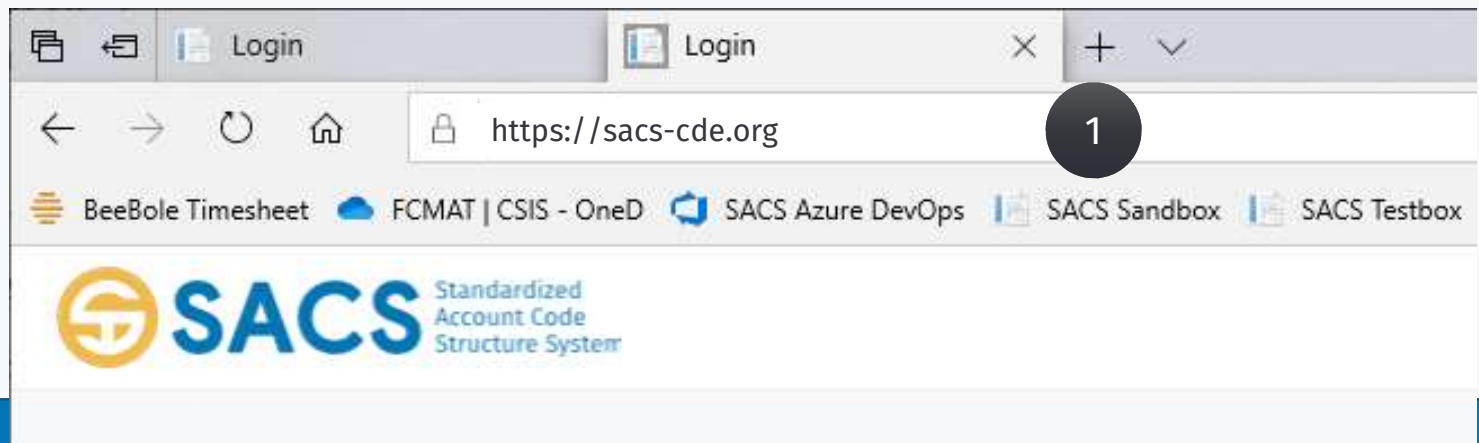
CLICK the SUBMIT button



LESSON 01 – Application Security

Logging on to the SACS Application

- Access the **SACS Web Application** on the Internet
- Login using your Entity specific **Username** and **Password**
- Verify your **entity, account status** and **role**
- Updating your SACS user account **contact information**



LESSON 01 – Application Security

Logging to the SACS Application

- Locate the *SACS Web Application* on the Internet
- Login using your Entity specific **Username** and **Password**
- Verify your *entity, account status* and *role*
- Updating your SACS user account **contact information**

The screenshot shows the login interface for the SACS application. At the top, there are two tabs: "Login" (selected) and "Create Account". Below the tabs are two input fields: a username field containing "enorman@fcmat.org" (marked with a black circle containing the number 2) and a password field with masked characters (marked with a black circle containing the number 3). Below the password field is a "Terms of Service" section with a blue header. It contains a scrollable panel with the text "View Terms of Service (scrollable panel depending upon amount of text)" and a checked checkbox labeled "I agree to the Terms of Service". Below the terms of service is a blue "Login" button (marked with a black circle containing the number 4) and a link for "Forgot Password?".



LESSON 01 – Application Security

Logging to the SACS Application

- Locate the **SACS Web Application** on the Internet
- Login using your Entity specific **Username** and **Password**
- Verify your **entity**, **account status** and **role**
- Updating your SACS user account **contact information**

Welcome, EmanuelLEA
2018-19 57-72694-0000000 Washington Unified

Entities associated with your profile

Find Entities

57-72710-0000000 Woodland Joint Unified
57-72686-0000000 Esparto Unified

1

2

3

Edit Profile

Tools

Logout

User Information

| First Name | Last Name | Phone Number | Extension | Email / Username | Password Stat... | Account Status | Action | Password |
|------------|-----------|--------------|-----------|-------------------|------------------|----------------|--------|----------|
| EmanuelLEA | LEAUser | | | emanuelnorman@... | Active | Active | | |

2

3



UNIT 01 – Application Security

Change Password

User Information

| First Name | Last Name | Phone Number | Extension | Email / Username | Password St... | Account Stat... |
|--------------------------------------|-------------------------------------|----------------------|----------------------|---|-------------------------------------|-------------------------------------|
| <input type="text" value="Emanuel"/> | <input type="text" value="Norman"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="enorman@fcm..."/> | <input type="text" value="Active"/> | <input type="text" value="Active"/> |

User Entity Roles

| Level | Entity Name | Roles |
|------------------------------------|---|---|
| California Department of Education | 99-00000-0000000 California Department of Education | <input type="text" value="Analyst"/> |
| School District | 01-61119-0000000 Alameda Unified | <input type="text" value="Administration"/> |

(1-10 of 2 rows)

- Administration
- Dataset Approval
- Edit DataSet
- Edit Draft Dataset
- Oversight
- User Management



LESSON 01 – Application Security

Logging to the SACS Application

- Locate the **SACS Web Application** on the Internet
- Login using your Entity specific **Username** and **Password**
- Verify your **entity, permissions** and **role**
- Updating your SACS user account **contact information**

[Change Password](#)

User Information

| First Name | Last Name | Phone Number | Extension | Email / Username | Password St... | Account Stat... |
|--------------------------------------|-------------------------------------|----------------------|----------------------|---|-------------------------------------|-------------------------------------|
| <input type="text" value="Emanuel"/> | <input type="text" value="Norman"/> | <input type="text"/> | <input type="text"/> | <input type="text" value="enorman@fcm..."/> | <input type="text" value="Active"/> | <input type="text" value="Active"/> |



LESSON 01 – Application Security

Managing your SACS User Account

- Change your SACS **password**
- Change your **email address/username**
- Change your **entity** (if you are associated with more than one)
- **Reset** your password
- Notes about the status of your account
 - You will be logged out of system with 30 minutes of inactivity. **Save your work often.**
 - You will be notified by email that your account is **LOCKED** after **5 failed** attempts to login
 - You will be notified by email that your password will expire **in 12 days**
 - You will be notified by email that your password has expired **after 90 days**
 - You will be notified by email that your password has **expired for 1 year** and will be **inactive**
- Indicate whether you would like to **OPT-IN** to the **Beta Testing** email distribution list



LESSON 01 – Application Security

Managing SACS User Accounts

- Viewing specific SACS users
 - View all **PUBLIC** user accounts on the User List
 - View all **LOCKED** and **INACTIVE** user accounts on the User List
 - View all **ACTIVE** accounts for your specific entity on the User List
 - Use the **filter/sort feature** to view specific accounts on the User List
- *Modifying specific information on existing accounts*



LESSON 01 – Application Security

Managing SACS User Accounts

Select the **View User List** on the Top Ribbon under the **Users** menu to view the User List

| First Name | Last Name | Email | Extension | Password | Expiration | Status | Agency | Actions |
|-------------------------|-----------|----------------------------|-----------|----------|----------------|----------|-------------------------------------|----------------------------|
| Admin | Tester | qaresetf... | | New | | | | [User Icon] [Refresh Icon] |
| Administration | Coe | coeadmi... | | Expired | | | | [User Icon] [Refresh Icon] |
| AdminTestKD | KD | kkdata.c... | | Expired | | | | [User Icon] [Refresh Icon] |
| AlamedaUnified District | Tester | qatest1.fcmat+AlamedaU... | | Active | 07-12-20 17:00 | Active | 01-61119-0000000 Alameda Unified | [User Icon] [Refresh Icon] |
| b8jp4sjw | b8jp4sjw | testprojectionpro+14144... | | New | (none) | Active | | [User Icon] [Refresh Icon] |
| bob | ross | bob@ross.com | | New | (none) | Active | | [User Icon] [Refresh Icon] |
| brenda | aquino | baquino@cde.ca.gov | | Expired | 02-14-20 11:20 | Active | 99-00000-0000000 California Depa... | [User Icon] [Refresh Icon] |
| Calveras COE 1 | Tester | qatest1.fcmat+CalverasC... | | Expired | 06-21-19 08:22 | Active | 05-10058-0000000 Calaveras Count... | [User Icon] [Refresh Icon] |
| b8jp4sjw | b8jp4sjw | testprojectionpro+14144... | | New | (none) | Active | | [User Icon] [Refresh Icon] |
| bob | ross | bob@ross.com | | New | (none) | Active | | [User Icon] [Refresh Icon] |
| brenda | aquino | baquino@cde.ca.gov | | Expired | 02-14-20 11:20 | Active | 99-00000-0000000 California Depa... | [User Icon] [Refresh Icon] |
| Calveras COE 1 | Tester | qatest1.fcmat+CalverasC... | | Expired | 06-21-19 08:22 | Active | 05-10058-0000000 Calaveras Count... | [User Icon] [Refresh Icon] |
| Carl | Kidwell | ckidwell@fcmat.org | | Expired | 02-27-19 14:09 | Inactive | 01-40410-0000000 Tri-Valley ROP JPA | [User Icon] [Refresh Icon] |
| CDE | Analyst | CDEAnalyst@gmail.com | | Active | 07-12-20 17:00 | Active | 99-00000-0000000 California Depa... | [User Icon] [Refresh Icon] |

(11-20 of 287 rows) << < 1 2 3 4 5 > >> 10 [Reset Sorts & Filters]

LESSON 01 – Application Security

Managing SACS User Accounts

The screenshot shows the SACS 'view Users' interface. At the top, there's a navigation bar with 'SACS Standardized Account Code Structure System' and user information 'Welcome, Emanuel' for '2019-20' at 'California Department of Education'. Below the navigation, there's a 'view Users' header and a filter dropdown menu currently set to 'All Users'. A table of users is displayed with columns for checkboxes, First Name, Last Name, Email, Account Status, and Entity. A modal window titled 'Account Status' is open, showing a search bar and three filter options: 'Active', 'Inactive', and 'Locked'. A 'Clear Selected Filters' button is at the bottom of the modal. A pagination bar at the bottom shows '(11-20 of 287 rows)' and page numbers 1 through 5.

View all PUBLIC user accounts on the User List

View all LOCKED, ACTIVE and/or INACTIVE user accounts on the User List

| | First Name | Last Name | Email | Account Status | Entity |
|--------------------------|----------------|-----------|----------------------------|----------------|----------------|
| <input type="checkbox"/> | Admin | Tester | qare... | Active | 02- |
| <input type="checkbox"/> | Admin | Tester | coea... | Inactive | 01- |
| <input type="checkbox"/> | kkda | | | Active | |
| <input type="checkbox"/> | brenda | aquino | baquino@cde.ca.gov | Expired | 02-14-20 11:20 |
| <input type="checkbox"/> | Calveras COE 1 | Tester | qatest1.fcmat+CalverasC... | Expired | 06-21-19 08:22 |
| <input type="checkbox"/> | Carl | Kidwell | ckidwell@fcmat.org | Expired | 02-27-19 14:09 |
| <input type="checkbox"/> | CDE | Analyst | CDEAnalyst@gmail.com | Active | 07-12-20 17:00 |

LESSON 01 – Application Security

Managing SACS User Accounts

Standardized Account Code Structure System

Dashboard Import Users Queues Tools FiscalYear

Welcome, Emanuel

2019-20 California Department of Education

view Users

All Users Filter 9 column(s) selected

Use the **filter/sort feature** to view specific accounts on the User List

| First Name | Last Name | Email | Phone Number | Extension | Password Status | Password Last Updated | Account Status | Entity |
|-------------------|-----------|-------|--------------|-----------|-----------------|-----------------------|----------------|-------------------------------------|
| Admin | | | | | New | (none) | Active | 02-10025-0000000 Alpine County O... |
| Administration | | | | | Expired | 03-18-19 10:29 | Inactive | 01-10017-0000000 Alameda County ... |
| AdminTestKD | | | | | Expired | 06-25-19 14:03 | Active | |
| AlamedaUnified Di | | | | | Active | 07-12-20 17:00 | Active | 01-61119-0000000 Alameda Unified |
| b8jp4sjw | | | | | New | (none) | Active | |
| bob | | | | | New | (none) | Active | |
| brenda | | | | | Expired | 02-14-20 11:20 | Active | 99-00000-0000000 California Depa... |
| Calveras COE 1 | | | | | Expired | 06-21-19 08:22 | Active | 05-10058-0000000 Calaveras Count... |
| Carl | | | | | Expired | 02-27-19 14:09 | Inactive | 01-40410-0000000 Tri-Valley ROP JPA |
| CDE | | | | | Active | 07-12-20 17:00 | Active | 99-00000-0000000 California Depa... |

11-20 of 287 rows

Reset Sorts & Filters

Clear Selected Filters

LESSON 01 – Application Security

Managing SACS User Accounts

- *Viewing specific SACS users*
 - *View all **PUBLIC** user accounts on the User List*
 - *View all **LOCKED** and **INACTIVE** user accounts on the User List*
 - *View all **ACTIVE** accounts for your specific entity on the User List*
 - *Use the **filter/sort feature** to view specific accounts on the User List*
- *Modifying specific information on existing accounts*



LESSON 01 – Application Security

Managing SACS User Accounts

The screenshot shows the SACS user management interface. The top navigation bar includes 'SACS Standardized Account Code Structure System', 'Dashboard', 'Import', 'Users', 'Queues', 'Tools', and 'FiscalYear'. The user is logged in as Emanuel. The 'view Users' page displays a table of users with columns for 'First Name', 'Last Name', 'Account Status', and 'Entity'. A red circle highlights the 'Edit User' button in the table. A callout box labeled '1' points to this button. Below the table, the 'Edit Profile' dialog box is open, showing the 'User Information' section. A callout box labeled '2' points to the 'First Name' field. The 'Save All Changes' button is highlighted with a callout box labeled '3'. The 'Add Entity/Role' button is also visible.

Entering user information

1. Click the **EDIT USER** button to open the EDIT PROFILE dialog box
2. Enter user information for the account.
3. Click the **SAVE ALL CHANGES** button.

| First Name | Last Name | Account Status | Entity |
|----------------|-----------|----------------|-------------------------------------|
| Admin | Tester | Active | 02-10025-0000000 Alpine County O... |
| Administration | Coe | Inactive | 01-10017-0000000 Alameda County ... |
| AdminTestKD | KD | Active | |

Edit Profile

User Information

| First Name | Last Name | Phone Number | Extension | Email / Username | Password Stat... | Account Status | Action | Password |
|------------|-----------|--------------|-----------|-----------------------|------------------|----------------|--------|----------|
| EmanuelLEA | LEAUser | 123-456-7890 | 149 | emanuelnorman@outl... | Active | Active | | |



LESSON 01 – Application Security

The screenshot shows the SACS application interface. At the top, the SACS logo and navigation menu are visible. The main content area is titled 'Edit Profile' and includes a 'User Information' section with fields for 'First Name' (EmanuelLEA) and 'Last Name' (LEAUser). A red box highlights the 'Add Entity/Role' button with a plus sign and a lock icon, labeled with a '3' in a black circle. A central text box contains the following instructions:

Editing, adding, or deleting roles associated with an account

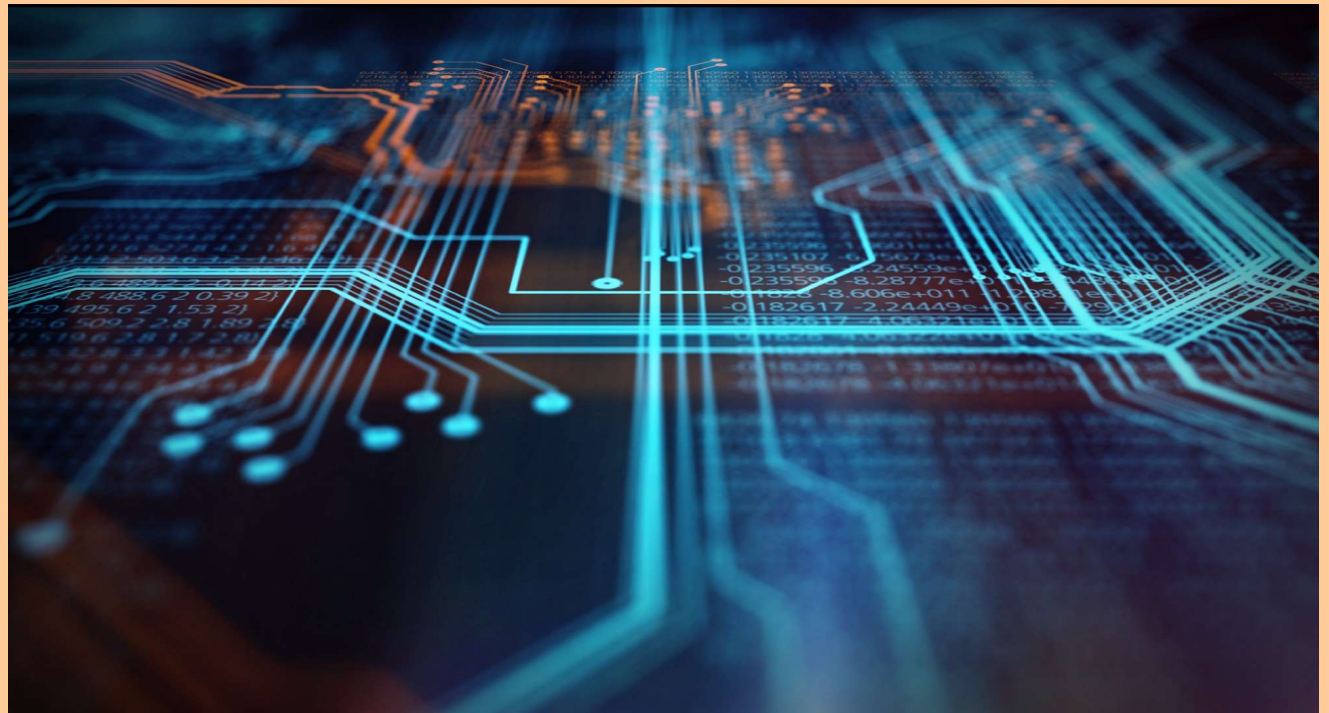
1. Click the **EDIT ENTITY ROLES** button to open the Entity Roles dialog box
2. Add or Delete roles for the account
3. Save Changes

A second red box highlights the 'Edit Entity Roles' button (a pencil icon) on the right side of the profile, labeled with a '1' in a black circle. A third red box highlights the 'Edit Entity Roles' dialog box, which is open and shows a list of roles with checkboxes. The 'Administration' role is selected, and the 'Update' button is highlighted with a '2' in a black circle. The dialog box also shows a search bar and a list of roles including 'Administration', 'Dataset Approval', 'Edit DataSet', 'Edit Draft Dataset', 'Oversight', and 'User Management'.



LESSON 01 – Application Security

SACS Application Security Quiz



Quiz is located at:
[SACS Application Security Quiz](#)

