Introduction to SACS

SACS Application Course

Introduction
Unit 01 – Application Security
Unit 02 – Data Import
Unit 03 – **Dashboard**
Unit 04 – Forms
Unit 05 – Technical Review Checks (TRC)
Unit 06 – Data Submissions
LESSON 03 – Dashboard

SACS Web User Interface Performance Objectives

a) User must be able to identify parts of the SACS User Interface
   • Main Menu items
   • Specific dataset fields (CDS Code, dataset name, etc.)

b) User must be able to view only draft datasets

c) User must be able to view datasets by status and fiscal year

d) User must be able to sort/filter dataset by name or type

e) User must be able to create a copy of a dataset

f) User must be able to delete a dataset

g) Change a dataset state through the SACS workflow
The Dashboard interface has the following functionalities:

- View the status and details of dataset
- Filter and sort the dataset list by each data columns
- Copy/ delete a dataset
- Toggle to view draft, submission or all datasets
Introduction to the SACS Web Dashboard

The internal landing page (Dashboard) displays a list of all datasets that have been loaded into the system from within a specific LEA so users can easily see the status of the data that has been created in the system.

The SACS Web Dashboard organizes your imported datasets by:

- Viewing by fiscal year
- Viewing only draft datasets
- Sort/filter datasets by specific data types
1. Identify parts of the SACS Web User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. View only draft datasets
3. View datasets by Status and Fiscal Year
4. Sort/Filter dataset by name or type
5. Create a copy of a dataset
6. Delete a dataset
7. Change a dataset state through the SACS Web workflow
LESSON 03 – Dashboard

Introduction to the SACS Web Dashboard

The **User Profile menu** provides the name of the **user** logged in, the **Entity** and **CDS code** of the entity that the user is assigned as well as:

1. Access to your user profile for editing
2. Access to a help ticket form for requesting help
3. A logout option
LESSON 03 – Dashboard

Introduction to the SACS Web Dashboard

The **Main menu** provides access to:

1. The **Dashboard** (use to return to the home screen)
2. The **Import menu** (used to import datasets from your financial programs)
3. The **Users menu** (provides a list of all SACS Web users)
4. The **Queues menu** (provides access to all datasets available to you in different stages of the submission workflow)
5. The **Tools menu** (provides access to SACS tools such as the *Single String Validation* tool, *Blank Forms*, *Request for UA Promoter role* tool and the *Check Submission Status* tool)
LESSON 03 – Dashboard

Introduction to the SACS Web Dashboard

The Dashboard (main page) provides the user with:
1. A link to the User Guide
2. Toggle for viewing Draft or Official (submission) datasets
3. Compare datasets and Query SACS option
4. Fiscal Year selector
5. Column filter and selector
6. New Draft dataset button
The Dashboard (main page) also provides the user with:
1. A dataset global filter (any field)
2. Sortable columns with Sort/Filter toggles
3. Submission State indicator
4. Submission Notes field
5. An Actions column for copying and deleting datasets
6. Page selector and number of records shown
1. Identify parts of the SACS User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. User must be able to view only Draft Datasets
3. User must be able to view Datasets by Status and Fiscal Year
4. User must be able to Sort/Filter Dataset by name or type
5. User must be able to Create a copy of a dataset
6. User must be able to Delete a dataset
7. Change a dataset State through the SACS workflow
Introduction to the SACS Web Dashboard

User must be able to view only Draft Datasets
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Introduction to the SACS Web Dashboard

1. Identify parts of the SACS User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. User must be able to view only Draft Datasets
3. **User must be able to view Datasets by Status and Fiscal Year**
4. User must be able to Sort/Filter Dataset by name or type
5. User must be able to Create a copy of a dataset
6. User must be able to Delete a dataset
7. Change a dataset State through the SACS workflow
Introduction to the SACS Web Dashboard

User must be able to view Datasets by Status and Fiscal Year
1. Identify parts of the SACS User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. User must be able to view only Draft Datasets
3. User must be able to view Datasets by Status and Fiscal Year
4. **User must be able to Sort/Filter Dataset by name or type**
5. User must be able to Create a copy of a dataset
6. User must be able to Delete a dataset
7. Change a dataset State through the SACS workflow
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Introduction to the SACS Web Dashboard

User must be able to Sort/Filter Dataset by name or type
LESSON 03 – Dashboard

Introduction to the SACS Web Dashboard

1. Identify parts of the SACS User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. User must be able to view only Draft Datasets
3. User must be able to view Datasets by Status and Fiscal Year
4. User must be able to Sort/Filter Dataset by name or type
5. **User must be able to Create a copy of a dataset**
6. User must be able to Delete a dataset
7. Change a dataset State through the SACS workflow
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Introduction to the SACS Web Dashboard

User must be able to Create a copy of a dataset
1. Identify parts of the SACS User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. User must be able to view only Draft Datasets
3. User must be able to view Datasets by Status and Fiscal Year
4. User must be able to Sort/Filter Dataset by name or type
5. User must be able to Create a copy of a dataset
6. **User must be able to Delete a dataset**
7. Change a dataset State through the SACS workflow
LESSON 03 – Dashboard

Introduction to the SACS Web Dashboard

User must be able to Delete a dataset
1. Identify parts of the SACS User Interface
   - Main Menu items
   - Specific dataset fields (CDS Code, dataset name, etc.)
2. User must be able to view only Draft Datasets
3. User must be able to view Datasets by Status and Fiscal Year
4. User must be able to Sort/Filter Dataset by name or type
5. User must be able to Create a copy of a dataset
6. User must be able to Delete a dataset
7. **Change a dataset State through the SACS workflow**
LESSON 03 – Dashboard

Introduction to the SACS Web Dashboard

Change a dataset State through the SACS workflow
LESSON 03 – User Interface

SACS User Interface Quiz

Quiz is located at: User Interface Quiz