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Annual Report

FY 2023-24

FCMAT/CSIS Support of SACS Web System

Version 1.0
June 30, 2024

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Revision History

Name	Date	Reason for Changes	Version
Denise Harris	5/29/2024	Initial draft	.01
Denise Harris	6/20/2024	Updated report with Project Team comments	.02
Denise Harris		Submittal to CDE	1.0

Approval History

Approved By	Title	Version	Date Approved
Amy Fong	Chief Operations Officer Fiscal Crisis & Management Assistance Team/ California School Information Services Kern County Superintendent of Schools	1.0	
Elizabeth Dearstyne	Director School Fiscal Services Division California Department of Education	1.0	

1. Introduction

1.1 Purpose of the Annual Report

Consistent with Amendment 3 to the SACS System Replacement (SSR) Project Memorandum of Understanding (MOU), this M&O Annual Report summarizes the work performed by FCMAT/CSIS to maintain the SACS System Replacement (SSR) solution from July 2023 through June 2024 on behalf of and under the direction of the CDE. The report includes the budgeted and estimated actual M&O expenses and discusses maintenance adjustments and opportunities for the next year.

1.2 Document Conventions

The first approved version of the document will be numbered 1.0. Minor revisions (that is, format, spelling, or clarification) will retain the major version number and increment the revision number to the right of the decimal (for example 1.0, 1.1, 1.2...).

1.3 Approval Authority

The CSIS Chief Operations Officer shall approve this Annual Report on behalf of FCMAT/CSIS before submitting it to the CDE. The Director (or designee) of the School Fiscal Services Division shall approve this Annual Report on behalf of the CDE.

Approvals for Annual Report

2. Work Planned

The CDE and FCMAT/CSIS worked together to identify and clarify expectations for FY 2024-25 M&O activities. High-level classifications of work planned included the following:

- Core CDE responsibilities as documented in Amendment 3 to the SSR MOU.
- Core FCMAT/CSIS responsibilities as documented in Amendment 3 to the SSR MOU.
- A ranked list of M&O backlog work items, which includes business rule changes, and the order in which those ranked items should be developed.

3. Work Completed

The SACS Web System team reached agreement on remaining work and M&O details, and then refined the work items. The team collaborated to ensure that the highest priority items would be worked on in a ranked order that aligned with the CDE's needs.

M&O activity highlights are as follows:

- The CDE and FCMAT/CSIS management team participated in regularly scheduled meetings to review progress, plan upcoming work, discuss potential risks and mitigation strategies.
- The SACS Web System team cooperated to plan, document, and execute the M&O release schedule.
- The project management team worked collaboratively during multiple working sessions to create an M&O Workplan.
- The FCMAT/CSIS SME worked with the CDE to plan and develop SACS Web System Post-Release Webinars for LEA users.
- The Dev team developed and tested annual updates to the business rules of the SACS Web System, such as legislative and accounting standard changes, coversheets, forms, reports, and validation checks.
- The Dev team triaged defects and corrected and tested reproducible bugs.
- The Dev team partnered with the CDE to update and deploy the online user guide to the production environment to assist LEA users as they worked to complete required financial reporting using the new SACS Web System.
- The Dev team partnered with the CDE to support User Acceptance Testing (UAT) activities and to manage timely correction of defect findings.
- The team completed Sprints 77 – 93 on time, including by sprint review and demo meetings held to highlight and demonstrate completed work.

3.1 M&O Workplan

The SACS Web System M&O Workplan defined the scope of work and an estimated timeline for the work scheduled from July 2023 through June 2024. As a first step, the project management team reviewed and refined the work breakdown structure (WBS) to divide M&O activities into manageable components. The project management team identified M&O activities, grouped the WBS items by category or work type, and established an estimated timeframe. The project

management team then organized the work using a logical sequence based on dependencies between tasks. The sequencing provided sufficient opportunities for interaction, coordination, and discussion of input from team members to ensure timely work completion.

Below are major work categories, their percent complete, along with start and finish dates:

Task Name	%Complete	Start	Finish
Start M&O	100%	7/3/23	6/28/24
M&O Resources	100%	7/1/24	7/1/24
Budget	100%	9/29/23	9/29/23
Staffing	100%	7/3/23	7/5/23
SACS Web M&O Yearly Executive Meeting	100%	2/1/24	3/12/24
Schedule FCMAT/CSIS CDE Executive Meeting	100%	2/1/24	2/7/24
FCMAT/CSIS and CDE Executive Meeting Held	100%	3/12/24	3/12/24
SACS Web M&O Project Management	100%	7/3/23	6/28/24
Technical Services	100%	6/1/23	6/28/24
Hardware Maintenance	100%	7/3/23	7/25/23
Software Maintenance	100%	7/3/23	7/19/23
Network Maintenance	100%	7/3/23	7/7/23
Environments Maintenance	100%	6/1/23	6/28/24
Production Backlog Maintenance	100%	7/3/23	6/28/24
Support	100%	7/3/23	6/28/24
Release Management	100%	7/3/23	6/28/24
Identify and Report CRs and Defects	100%	7/3/23	6/28/24
Complete UAT for CRs and Defects in Test and Beta Environments	100%	7/3/23	6/28/24
Prioritize CRs and Defects	100%	7/3/23	6/28/24
Prioritize Backlog Included in all Releases	100%	7/3/23	6/28/24

Task Name	%Complete	Start	Finish
Develop Release Schedule	100%	7/3/23	6/28/24
Release Schedule by Reporting Period	100%	7/3/23	6/28/24
Public User Packet	100%	10/16/23	3/22/24

3.2 Defect Tracking

The team used Microsoft Azure DevOps to manage defects, also known as bugs, which were identified by either the CDE or the FCMAT/CSIS team. Utilizing data from the DevOps tooling the team analyzed the bugs created and the bugs closed during the fiscal year and compared these to the prior year.

Bugs Created:

Bug Severity	Prior Year	Current Year	Percent Change
Severity 1	3	0	-100%
Severity 2	233	164	-30%
Severity 3	144	152	+6%
Severity 4	50	51	+2%
Total	430	367	-15%

Bugs Fixed :

Bug Severity	Prior Year	Current Year	Percent Change
Severity 1	2	0	100%
Severity 2	302	165	45%
Severity 3	176	134	24%
Severity 4	94	16	83%
Total	574	315	45%

The team improved the quality of the software during the year with an overall improvement of 15% fewer bugs found in the system. This improvement is a good indicator that the system, as it matures, is stabilizing. There were no new high severity bugs found, and the team saw an improvement of 30% fewer severity 2 bugs this year. The rate of defect fixes aligned with the decrease in new bugs logged over the same time period.

To determine how defects impact the overall quality of the system, FCMAT/CSIS uses a common industry methodology for calculating the software quality metric. This metric compares the number of defects found per 1,000 lines of code. The prior fiscal year M&O annual report noted that SACS Web contained 7,036,331 lines of code. This year we revised our method for counting the lines of code in the system since each new revision of a versioned item of the application has a multiplying effect to the count of lines of code. The increase in versions caused the code base to grow to over 74 million lines of code.

For the purposes of evaluating the defects per lines of code, FCMAT/CSIS excluded lines of code that supported the multi-year versioned components. This resulted in a revised count of 1,935,766 lines of code or 1,936 thousand lines of code (KLOC) to calculate the metric of defects to KLOC. The industry acceptable range for this metric is 1-5 defects per KLOC. Using this measurement, the SACS Web project, at the time of report writing, had 91 active defects resulting in a defects per KLOC rate of 0.05 defects per KLOC. The annual bug total was 315 which computes to 1.6 bugs per KLOC, well within the industry accepted range for quality software.

4. Budgeted and Actual Expenses for FY 2023-24

Salaries and salary-driven benefits costs continue to be the largest expense. FCMAT/CSIS staff receive cost of living adjustments each year as part of Kern County Superintendent of Schools (KCSOS). Neither FCMAT nor CSIS are consulted in the classified union negotiations, but FCMAT/CSIS is bound to the outcomes of those negotiations.

The estimated total for rents, leases, and repairs reflects the expense schedule from long-term lease agreements. This line included expenses for responsibilities for the shared areas of the building where the landlord recovers those costs from tenants each year; this amount varies from year to year.

The supplies and non-capitalized equipment expenses reflect the planned technology replacement schedule. Expenses for the server refresh were inadvertently budgeted as non-capitalized equipment; however, upon review by the KCSOS Business Office, they should have been expensed as capitalized equipment. A line for capital outlay shows the proper expense for capitalized equipment.

Direct costs reflect expenses for the work of the usability designer who is funded through non-SACS dollars.

As in prior years, FCMAT/CSIS retains professional consultant services to augment expertise and capacity to complete the annual Statement of Work.

Communications expenses include expenses for retrieving and returning staff equipment that is under maintenance by FCMAT/CSIS infrastructure team or manufacturer service.

A line for capital outlay was added to the budget for the purposes noted above.

5. Work planned for FY 2024-25

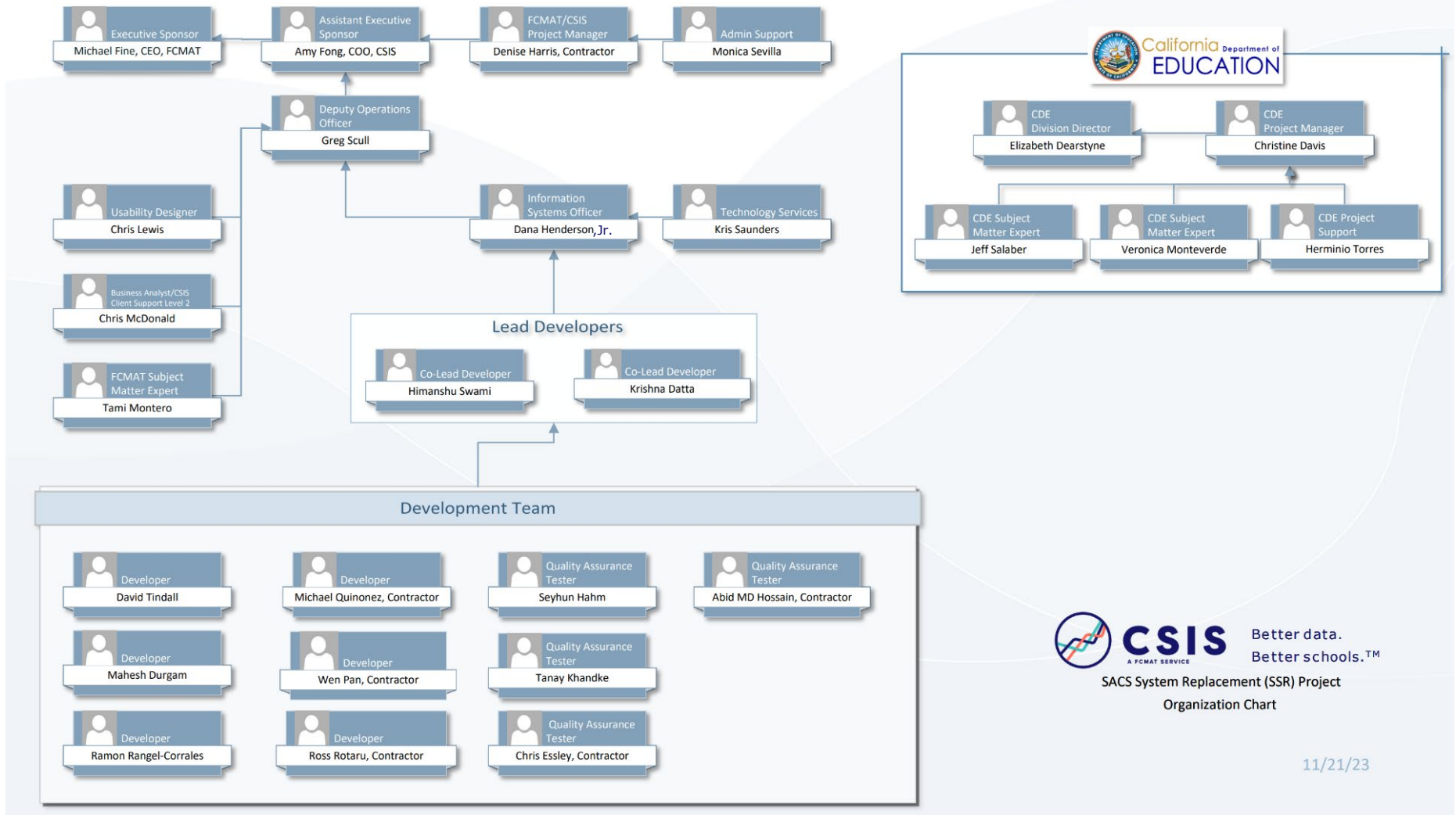
FCMAT/CSIS and the CDE will agree on an approved SACS Web System M&O Workplan which will serve as a baseline of planned work for the fiscal year. The baselined project Workplan will be used to compare planned versus actual work completed. The FCMAT/CSIS M&O PM will review the Workplan weekly and update it as work is finished. The baselined Workplan will be housed on the project's SharePoint site where it is accessible to project stakeholders.

6. Conclusion

FCMAT/CSIS completed a significant amount of remaining and M&O work. The SACS Web leadership team agreed to a plan for completion of remaining work as defined in the Proposal. The SACS Web M&O team, in addition, completed development of a ranked listing of M&O backlog work items which included annual business rule changes. At the CDE's direction, additionally, FCMAT/CSIS deployed to production an updated version of the online User Guide which focused on LEA workflow.

The CDE and FCMAT/CSIS continue to enjoy a close and supportive working relationship as partners on the SACS Web System and will continue to work collaboratively throughout FY 2024-25.

Appendix A: SACS Web System M&O Organizational Chart for FY 2023-24



Appendix B: Budgeted and Actual Expenses for 2023-24

	FY 2023-24 Budget	FY 2023-24 Estimated Actuals As of 6/21/24
REVENUES		
Beg. Balance - Prior Yr. Carryover	1,068,423	1,068,423
Current Year Appropriation	3,920,000	3,920,000
TOTAL REVENUES	4,988,527	4,988,423
EXPENDITURES		
Classified Salaries	1,235,057	1,259,188
Employee Benefits	552,700	550,132
Supplies & Non-Cap. Equip.	167,000	52,519
Services, Other Operating Exp.	3,033,770	1,243,463
Travel & Conference (5200)	10,000	7,888
Rents, Leases, & Repairs (5600)	118,000	116,743
Direct Costs (5710)	98,388	98,388
Professional/Consultant Services	2,802,382	1,018,944
Consulting Services (5800)	1,242,289	923,338
Software Licenses (5800.41)	156,800	95,606
Hardware Maintenance (5800.45)	0	
Hold for Unexpected Expenses (5800.99)	1,403,293	
Communications	5,000	1,500
Capital Outlay		51,546
Switches & Routers		
Server Refresh		51,546
TOTAL EXPENDITURES	4,988,527	3,156,848
Ending Balance	0	1,831,575

Appendix C: Change Requests (as of 6/30/24)

The table below lists Unaudited Actuals Reporting Period Gap Changes for FYs 2023-24 and 2022-23:

ID	Title	State
78680	AU: #26 - SW24044 - (CDE c/o Item #5) -- ESMOE -- COE Unaudited Actuals	Closed
78878	AU: #23 - SW24001TRC - (CDE c/o Item #1) -- ADA-PROVIDE -- COE, District, COE Charter, District Charter Unaudited Actuals	Closed
78880	AU: #36 - SW23043 - (CDE c/o Item #19) -- GANN -- District Unaudited Actuals	Closed
78884	AU: #38 - SW24033 - (CDE c/o Item #1) -- Top Nav -- COE, District, JPA, COE Charter, District Charter Unaudited Actuals	Closed
78890	AU: #41 - SW24033 - (CDE c/o Item #2) -- Top and Left Nav -- COE, District, JPA, COE Charter, District Charter Unaudited Actuals	Closed
79442	AU: #49 - SW24043 - (CDE c/o Item #1) -- GANN -- COE Unaudited Actuals	Closed
79444	AU: #50 - SW24043 - (CDE c/o Item #1) -- GANN -- District Unaudited Actuals	Closed
79446	AU: #51 - SW24043 - (CDE c/o Item #5) -- GANN -- COE Unaudited Actuals	Closed
79448	AU: #52 - SW24043 - (CDE c/o Item #6) -- GANN -- District Unaudited Actuals	Closed
79450	AU: #53 - SW24043 - (CDE c/o Item #8) -- GANN -- District Unaudited Actuals	Closed
79452	AU: #54 - SW24043 - (CDE c/o Item #13) -- GANN -- COE Unaudited Actuals	Closed
79454	AU: #55 - SW24043 - (CDE c/o Item #13) -- GANN -- District Unaudited Actuals	Closed
79456	AU: #56 - SW24043 - (CDE c/o Item #14) -- GANN -- COE Unaudited Actuals	Closed
79458	AU: #57 - SW24043 - (CDE c/o Item #14) -- GANN -- District Unaudited Actuals	Closed
79460	AU: #58 - SW24043 - (CDE c/o Item #15) -- GANN -- COE Unaudited Actuals	Closed
79462	AU: #59 - SW24043 - (CDE c/o Item #15) -- GANN -- District Unaudited Actuals	Closed
79464	AU: #60 - SW24043TRC - (CDE c/o Export Item #1) -- GANN-PROVIDE -- COE, District Unaudited Actuals	Closed
79468	AU: #62 - SW24012 - (CDE c/o Item #9B) -- SEMA -- COE, District, JPA, COE Charter, District Charter Unaudited Actuals	Closed
79470	AU: #63 - SW24012 - (CDE c/o Item #11) -- SEMA -- COE, District, JPA, COE Charter, District Charter Unaudited Actuals	Closed
79474	AU: #66 - SW24044TRC - (CDE c/o Item #2) -- ESMOE-ADA -- COE Unaudited Actuals	Closed
79586	AU: #74 - SW24044 - (CDE c/o Item #5) -- ESMOE -- COE Unaudited Actuals	Closed
80028	AU: #95 - SW24020TRC - (CDE c/o Item #7) -- TRC DEBT-PY-BAL -- COE, District, JPA, COE Charter, District Charter Unaudited Actuals	Closed

ID	Title	State
80291	AU: #99 - CSAF 2024-01 - (CDE c/o Item #2) -- ALT Form -- COE Charter, District Charter Unaudited Actuals	Closed
80293	AU: #100 - CSAF 2024-01 - (CDE c/o Item #3) -- ALT Form -- COE Charter, District Charter Unaudited Actuals	Closed
80295	AU: #101 - CSAF 2024-01 - (CDE c/o Item #6) -- ALT Form -- COE Charter, District Charter Unaudited Actuals	Closed
80297	AU: #102 - CSAF 2024-01 - (CDE c/o Item #7) -- ALT Form -- COE Charter, District Charter Unaudited Actuals	Closed
80299	AU: #103 - CSAF 2024-10 - (CDE c/o Item #1) -- IFCs -- COE Charter, District Charter Unaudited Actuals	Closed
80301	AU: #104 - CSAF 2024-10 - (CDE c/o Item #5) -- IFCs -- COE Charter, District Charter Unaudited Actuals	Closed
80303	AU: #105 - CSAF 2024-10 - (CDE c/o Item #6) -- IFCs -- COE Charter, District Charter Unaudited Actuals	Closed
80316	AU: #106 - CSAF 2024-11 - (CDE c/o Item #3) -- CHALT_BAL_TOTAL -- COE Charter, District Charter Unaudited Actuals	Closed
80318	AU: #107 - CSAF 2024-11 - (CDE c/o Item #4) -- CHALT_CEFB_FD_EQUITY_ACCRUAL -- COE Charter, District Charter Unaudited Actuals	Closed
80320	AU: #108 - CSAF 2024-11 - (CDE c/o Item #5) -- CHALT_CEFB_FD_EQUITY_MODIFIED_ACCRUAL -- COE Charter, District Charter Unaudited Actuals	Closed
80322	AU: #109 - CSAF 2024-11 - (CDE c/o Item #10) -- CHALT_DIR_COSTS -- COE Charter, District Charter Unaudited Actuals	Closed
80326	AU: #111 - CSAF 2024-11 - (CDE c/o Item #10) -- CHALT_LCFF_SOURCES -- COE Charter, District Charter Unaudited Actuals	Closed
80328	AU: #112 - CSAF 2024-11 - (CDE c/o Item #19) -- CHALT_NET_INV_CAP_ASSETS -- COE Charter, District Charter Unaudited Actuals	Closed
80330	AU: #113 - CSAF 2024-11 - (CDE c/o Item #20) -- CHALT_OBJ_POSITIVE -- COE Charter, District Charter Unaudited Actuals	Closed
80332	AU: #114 - CSAF 2024-11 - (CDE c/o Item #24) -- CHALT_UNR_NET_POSITION_NEG -- COE Charter, District Charter Unaudited Actuals	Closed
80693	AU: #116 - SW24043 - (CDE c/o Item #1) -- GANN -- COE Unaudited Actuals	Closed
80695	AU: #117 - SW24043 - (CDE c/o Item #1) -- GANN -- District Unaudited Actuals	Closed
80751	AU: #119 - CSAF 2024-11 - (CDE c/o Item #4) -- CHALT_CEFB_FD_EQUITY_ACCRUAL -- COE Charter, District Charter Unaudited Actuals	Closed
80753	AU: #120 - CSAF 2024-11 - (CDE c/o Item #5) -- CHALT_CEFB_FD_EQUITY_MODIFIED_ACCRUAL -- COE Charter, District Charter Unaudited Actuals	Closed

The table below lists Budget Reporting Period Gap Changes for FY 2024-25:

ID	Title	State
77589	AU: #1 - SW24039 - (CDE c/o Item #5) -- CASH -- COE, District, JPA, COE Charter, District Charter Budget	Closed
77593	AU: #3 - SW24039 - (CDE c/o Item #6) -- CASH -- COE, District, JPA, COE Charter, District Charter Budget	Closed
77595	AU: #4 - SW24039 - (CDE c/o Item #7) -- CASH -- COE, District, JPA, COE Charter, District Charter Budget	Closed
77597	AU: #5 - SW24039 - (CDE c/o Item #8) -- CASH -- COE, District, JPA, COE Charter, District Charter Budget	Closed
77601	AU: #7 - SW24039TRC - (CDE c/o Item #1) -- CASHFLOW-PROVIDE -- COE, District, JPA, COE Charter, District Charter Budget	Closed
78223	AU: #8.1 - SW24004 - (CDE c/o Annual Item #1) -- 01CS -- COE Budget	Closed
78225	AU: #8.2 - SW24004 - (CDE c/o Annual Item #1) -- 01CS -- District Budget	Closed
78227	AU: #8.3 - SW24004 - (CDE c/o Annual Item #1) -- 01CS -- JPA only Budget	Closed
78229	AU: #9.1 - SW24004 - (CDE c/o General Item #1) -- 01CS -- COE Budget	Closed
78231	AU: #9.2 - SW24004 - (CDE c/o General Item #1) -- 01CS -- District Budget	Closed
78233	AU: #10.1 - SW24004 - (CDE c/o General Item #5) -- 01CS -- COE Budget	Closed
78235	AU: #10.2 - SW24004 - (CDE c/o General Item #5) -- 01CS -- District Budget	Closed
78237	AU: #11.1 - SW24004 - (CDE c/o General Item #7) -- 01CS -- COE Budget	Closed
78239	AU: #11.2 - SW24004 - (CDE c/o General Item #7) -- 01CS -- District Budget	Closed
78241	AU: #11.3 - SW24004 - (CDE c/o General Item #7) -- 01CS -- JPA Budget	Closed
78243	AU: #12 - SW24009 - (CDE c/o Item #6) -- Fund-a -- COE, District, COE Charter, District Charter Budget	Closed
78249	AU: #15 - SW24010B - (CDE c/o Item #6) -- Fund-b -- COE, District, COE Charter, District Charter Budget	Closed
78255	AU: #18.1 - SW24004 - (CDE c/o Annual Item #2) -- 01CS -- COE Budget	Closed
78257	AU: #18.2 - SW24004 - (CDE c/o Annual Item #2) -- 01CS -- District Budget	Closed
78259	AU: #18.3 - SW24004 - (CDE c/o Annual Item #2) -- 01CS -- JPA Budget	Closed
78261	AU: #19 - SW24004TRC - (CDE c/o General Item #1 CS-EXPLANATIONS) -- CS-EXPLANATIONS -- COE, District, JPA Budget	Closed
78263	AU: #20.1 - SW24025 - (CDE c/o Item #1) -- MYP -- COE, District Budget	Closed
78265	AU: #20.2 - SW24025 - (CDE c/o Item #1) -- MYP -- JPA only Budget	Closed

78676	AU: #24 - SW24038TRC - (CDE c/o Item #1) -- CHK-EXTRACTED-DATA-SOURCE -- COE, District, COE Charter, District Charter Budget	Closed
78678	AU: #25 - SW24044 - (CDE c/o Item #5) -- ESMOE -- COE Budget	Closed
78684	AU: #28 - SW24004 - (CDE c/o General Item #8) -- 01CS -- District Budget	Closed
78686	AU: #29 - SW24004 - (CDE c/o General Item #8) -- 01CS -- JPA Budget	Closed
78689	AU: #30 - SW24004 - (CDE c/o General Item #9) -- 01CS -- District Budget	Closed
78692	AU: #31 - SW24004 - (CDE c/o General Item #9) -- 01CS -- JPA Budget	Closed
78701	AU: #34 - SW24003 - (CDE c/o Item #1) -- SEA -- COE, District, JPA Budget	Closed
78876	AU: #22 - SW24001TRC - (CDE c/o Item #1) -- ADA-PROVIDE -- COE, District, COE Charter, District Charter Budget	Closed
78882	AU: #37 - SW24033 - (CDE c/o Item #1) -- Top Nav -- COE, District, JPA, COE Charter, District Charter Budget	Closed
78888	AU: #40 - SW24033 - (CDE c/o Item #2) -- Top and Left Nav -- COE, District, JPA, COE Charter, District Charter Budget	Closed
78894	AU: #43 - SW24004 - (CDE c/o General Item #11) -- 01CS -- District Budget	Closed
79476	AU: #67 - SW24018 - (CDE c/o Item #2) -- CB -- COE Budget	Closed
79478	AU: #68 - SW24018 - (CDE c/o Item #2) -- CB -- District Budget	Closed
79480	AU: #69 - SW24018 - (CDE c/o Item #2) -- CB -- JPA Budget	Closed
79482	AU: #70 - SW24004 - (CDE c/o General Item #8) -- 01CS -- District Budget	Closed
79484	AU: #71 - SW24004 - (CDE c/o General Item #9) -- 01CS -- District Budget	Closed
79584	AU: #73 - SW24044 - (CDE c/o Item #5) -- ESMOE -- COE Budget	Closed
79594	AU: #78 - SW24006A - (CDE c/o Item #1) -- LEA and SCHOOL Tables -- COE, District, JPA, COE Charter, District Charter Budget	Closed
79596	AU: #79 - SW24006A - (CDE c/o Item #2) -- SELPA Tables -- COE, District, JPA, COE Charter, District Charter Budget	Closed
79606	AU: #85 - SW24003 - (CDE c/o Item #1) -- SEA -- COE, District, JPA Budget	Closed
79811	AU: #87 - SW24006B - (CDE c/o Items #2-4, #8-11, #12coe, #12dist, #14-16, #18) -- Tables -- COE, District, JPA, COE Charter, District Charter Budget	Closed
79813	AU: #88 - SW24006B - (CDE c/o Item #13) -- Tables -- COE Budget	Closed
79833	AU: #89 - SW24006B - (CDE c/o Item #17) -- Tables -- COE, District, JPA Budget	Closed

79835	AU: #90 - SW24031 - (CDE c/o Item #2) -- Table of Contents -- COE Charter Budget	Closed
79849	AU: #91 - SW24006B - (CDE c/o Item #3) -- Tables -- District Charter Budget	Closed
79922	AU: #92 - SW24006B - (CDE c/o Item #4) -- Tables -- District Charter Budget	Closed
79976	AU: #93 - SW24006B - (CDE c/o Item #8 & #9) -- Tables -- District Budget	Closed
80026	AU: #94 - SW24020TRC - (CDE c/o Item #4) -- TRC DEBT-ACTIVITY -- COE, District, JPA, COE Charter, District Charter Budget	Closed
80030	AU: #96 - SW24006B - (CDE c/o Item #13) -- Tables -- District Budget	Closed
80184	AU: #97 - SW24006A - (CDE c/o Item #1) -- LEA and SCHOOL Tables -- COE Charter, District Charter Budget	Closed
80186	AU: #98 - SW24006B - (CDE c/o Item #3) -- Tables -- COE, District Budget	Closed
80538	AU: #115 - SW24006A - (CDE c/o Item #1) -- LEA and SCHOOL Tables -- COE Charter, District Charter Budget	Closed
80749	AU: #118 - SW24006B - (CDE c/o Item #3) -- Tables -- District Budget	Closed
80755	AU: #121 - SW24006B - (CDE c/o Item #18) -- Tables -- COE, District, JPA, COE Charter, District Charter Budget	Closed
80893	AU: #122 - SW24006A - (CDE c/o Item #1) -- LEA and SCHOOL Tables -- COE Charter, District Charter Budget	Closed

Appendix D: Ranked Listing of SACS Web System M&O Work Items

The table below is a ranked listing of Priority 500 M&O work items:

ID	Title	State
75429	Check Submission Status updates	Closed
75428	Form CAT: Freeze description column on all tabs	Closed
39388	Ad-hoc/manual Email Draft Area	Closed
79224	Reports - Exception Report TRC Run Date Earlier than System Version Date (66140) -- Excel	Closed
79223	Reports - Exception Report TRC Run Date Earlier than System Version Date (66140) -- UI	Closed
79209	Data Changed By CDE (23100/24000) -- (Update) -- Check for new ElementCode	Closed
58959	COE Software Contact Information - Delete	Closed
37400	Add StateGL for a selected Fiscal Year	Closed
67756	Adjust the default sort order of Reporting Period	Closed
37127	Email log for manually sent emails	Closed
37403	Export StateGL for a selected Fiscal Year	Closed
37399	Edit StateGL for a selected Fiscal Year	Closed
37401	Delete StateGL after confirmation for a selected Fiscal Year	Closed
37402	Import StateGL for a selected Fiscal Year	Closed
37396	Export StateElements for a selected Fiscal Year	Closed
37392	Edit StateElements for a selected Fiscal Year	Closed
37393	Add StateElements for a selected Fiscal Year	Closed
37394	Delete StateElements after confirmation for a selected Fiscal Year	Closed
37395	Import StateElements for a selected Fiscal Year	Closed
51024	FYI email to users that the validation tables have been updated in the [SSR]	Closed
51060	Scheduled System Maintenance	Closed
50932	New Reporting Period Available	Closed
58194	Export CBO and Superintendent data for a given fiscal year	Closed
58195	Import CBO and Superintendent data for a given fiscal year	Closed
30652	Import Approved ICStraight Rate	Closed
58196	Import Component Versions data	Closed
58197	Export Component Versions data	Closed
52854	CDE UA Submission Checklist (State 35 and later)	Closed
39939	Export UA data for publishing to CDE website	Closed
52903	T-4 - New Reporting Period Available (Manual)	Closed
68170	Batch User Available Options	Closed
54388	COE/SingleDistrict Dataset Approval - Dynamic	Closed
52923	T-15 - Reporting Period Closing (90 Day Reminder) (Manual)	Closed
54392	All Users - Dynamic	Closed

51064	System is Now Available	Closed
39392	Distribution List Management - View	Closed
52949	T-30 - FYI email to users that the validation tables have been updated in the SACS System	Closed
54460	All users at the Reporting Entity with the Dataset Approval role. - Dynamic	Closed
52905	T-5 - Issues Identified Email (Manual)	Closed
47268	Distribution List management - Edit Static lists	Closed
55055	DL47 - ALL users at the SBE and below	Closed
55276	Distribution List Management - Edit Static DL member	Closed
53787	Exporting Distribution list to excel/pdf	Closed
39390	COE Software Contact Information List - View by LEA	Closed
45115	COE Software Contact Information - Edit	Closed
58958	COE Software Contact Information - Add	Closed
54404	DL20 - All CDE users - Dynamic	Closed
54372	DL12 - All JPA Users - Dynamic	Closed
54376	DL13 - All SELPA AU users - Dynamic	Closed
54380	DL14 - All SELPA Members - Dynamic	Closed
50936	Issues Identified Email	Closed
58178	Export State GL	Closed
58180	Export State Element table	Closed
58179	Import State GL	Closed
58181	Import State Element Table	Closed
52925	T-16 - Reporting Period Closing (60 Day Reminder) (Manual)	Closed
52927	T-17 - Reporting Period Closing (30 Day Reminder) (Manual)	Closed
52929	T-18 - Reporting Period Closing (1 Day Reminder) (Manual)	Closed
52931	T-19 - Reporting Period Closing Today (Manual)	Closed
50972	Reporting Period Closing (90 Day Reminder)	Closed
50976	Reporting Period Closing (60 Day Reminder)	Closed
50980	Reporting Period Closing (30 Day Reminder)	Closed
50984	Reporting Period Closing (1 Day Reminder)	Closed
50988	Reporting Period Closing (Today)	Closed
54400	DL19 - All users (by Entity) - Dynamic	Closed
54412	All SBE Charter School Users - Dynamic	Closed
45097	Distribution List management - Add Static list	Closed
54336	All COE/SBE Sups and CBOs from selected entities - Dynamic	Closed
45098	Distribution List Management - Delete	Closed
75502	COE Software Contact Information DL must be used as a DL option	Closed
55274	Distribution List Management - Add Static DL member	Closed
55275	Distribution List Management - Remove static DL member	Closed
79105	Add "Export" button to version history screen	Closed

The table below is a ranked listing of Priority 600 M&O work items:

ID	Title	State
37306	ALT - Charter Alternative Form - Blank Version	Closed
38032	TRC - ALT Form - CHALT-LCFF-SOURCES	Closed
47461	ALT - Charter Alternative Form - Print Blank Version	Closed
54513	Budget ALT Form - (Tab 1) Certification	Closed
60454	Reports - Review Form ICR Analysis and Review (61150) --Part 2	Closed
61780	ALT - Charter Alternate Form (2022 UA change)	Closed
75964	Remove Certify/Promote to CDE role from selected counties	Closed
77425	Charter School Information: The CDE Received date, Report Format, and Report Level data are erroneously not cleared for charter schools filing with their authorizing agency's data, after their authorizing agency's submission is returned (state 34)	Closed
78521	Charter Schools Information: Request to add an export to Excel button	Closed
79222	Charter Schools Filing SACS Separate vs User GL (66160) -- (Update)	Closed

The table below is a ranked listing of Priority 600 M&O work items:

ID	Title	State
37563	Display Published Dataset List for selected fiscal year	Closed
39869	Publish Submission Data Review – Budget/Interim period data	Closed
52852	Public user can download published submission data as .dat, and .pdf files	Closed
52937	T-23 - Budget Submission Data Published (Manual)	Active
78843	LEA Budget/Interim Resubmission - Active Submission Check	Closed
78844	LEA Budget/Interim Resubmission - New State "Budget/Interim Submission Replaced"	Closed
79031	Nightly Automated Pre-Publish (NAPP) process for UA submissions in state 73	Closed
79362	Preview Statewide (CSV) Rollups	Closed
79364	View Publishing Screen	Closed
79367	Publish Unaudited Actuals Submissions in state 73	Closed
79371	Publish Budget Submissions in states 12 and 59	Closed
79376	Publish Interim Submissions in states 12 and 59	Closed
79386	Entity Name Field will be based on the fiscal year and Reporting Period on the SACS data explorer screen	Closed
79395	Results request will show submissions in state (15-LEA Published) or (65-CDE Published), or (UA submissions in state 75-Published).	Closed
79401	View files from query results for a selected entity's submission	Closed
79406	Download Rollup of Submission User Data for selected County, SBE, or ALL (State level)	Closed
79410	Download ZIP of dat files of the selected County, SBE, or ALL (statewide)	Closed
79414	Download Data Extract (xlsx) of selected entity's submission	Closed
79419	Print Submission Forms (PDF) of selected entity's submission	Closed
79424	Download (Official format) Dat File of selected Entity's submission.	Closed

ID	Title	State
79429	Download ZIP of all files of a selected Entity's submission	Closed
79518	Test Plan for Publish/Public	Closed