

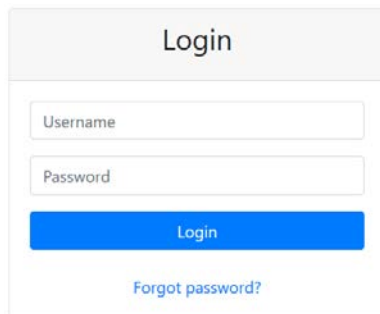
Auditor Transfer District

The Auditor Transfer district web site allows districts and charters to log in and view district-specific information. You need a district account to access the district web site. Contact your district administrator for assistance in creating a district account. Once you have a district account, you can perform the following function:

- View and manage district user accounts (district administrator only)
- View announcements (district user and administrator)
- View archived auditor transfers (district user and administrator)
- View and search auditor transfers (district user and administrator)

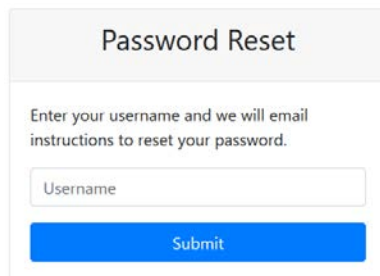
District Login

The login page prompts you to enter your username (email address) and password. Click on the **Login** button to access the district web site.



The screenshot shows a login form with a light gray header containing the word "Login". Below the header are two input fields: "Username" and "Password". Underneath the "Password" field is a blue button labeled "Login". At the bottom of the form is a blue link labeled "Forgot password?".

If you already have a district account and you forget your district account password, click on the Forgot Password link. This takes you to the Password Reset page, where you can enter your Username (email address).



The screenshot shows a password reset form with a light gray header containing the words "Password Reset". Below the header is a text prompt: "Enter your username and we will email instructions to reset your password." Underneath this prompt is a "Username" input field. At the bottom of the form is a blue button labeled "Submit".

Click on the **Submit** button to get an email with instructions on how to reset your password and login.

NOTE: only users with a district account can access the district web site or reset their password.

After a successful login, you are taken to the district web site home page. And the top navigation menu has links to the main features of the district website.

NOTE: only district administrators can access the User link or access this feature of the district website.

User Management

(Note: This page is available only to users who have admin right)

District Accounts page

You can access the District Accounts page by clicking on the **User** link on the top navigation menu.

NOTE: only district accounts with AT District Admin access can access the link and manage user accounts for their district.

From the District Accounts page, you can select the district to view district accounts. And you can also sort the columns by clicking on the column header or group the columns by its values by dragging the columns to the area above the headers. You can perform these functions from the District Account page:

- Select the district and view district accounts for that district
- Create new user district accounts
- Edit existing user district account profiles
- Send an email to users to reset their district account password

District Accounts

21 - LEMON GROVE

+ Create New User

Drag a column header and drop it here to group by that column

First Name	Last Name	Email	Role		
David	Galvan	dgalvan@sdcoe.net	ATDistrictAdmin	Reset Password	Edit

Navigation: 1 (selected) | 20 items per page | 1 - 1 of 1 items

Add New User

You add a new user by first clicking on the + **Create New User** button from the District Account page.

+ Create New User

Clicking the + **Create New User** button takes you to the Add New District User page.

Add New District User

First Name *

Last Name *

Email *

Phone *

Title *

Charter Schools or Districts *

Role *

Complete all form fields then click on the **Add** button to create the new district user account. The user then receives a link to confirm their email address.

NOTE: the user receives a link to confirm their email account when their email address has not been confirmed. If the user has confirmed their email address and forgot their password, click on the **Reset Password** button on the District Account page to send them a link to reset their password.

NOTE: a user is added the district from the Charter Schools or Districts drop down. The drop down has the districts associated with the user who is creating the district account.

Edit User

You edit a user record by clicking on the **Edit** button on the user list located in the District User page.



Clicking on the **Edit** button takes you to the Edit User page.

Edit User

First Name *

Last Name *

Phone *

Title *

Role

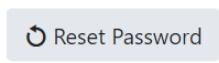
Charter Schools or Districts

Deleted User?

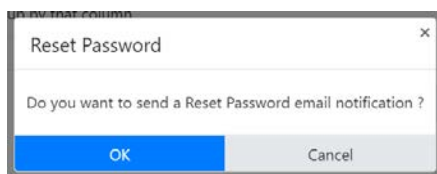
Complete the fields you want to update. You can also set the user's role to AT District Admin (can manage users) or AT District User (cannot manage users). And you can set the user's district to which the user has access to. Click on the **Save** button to update the information for the user.

Reset Password

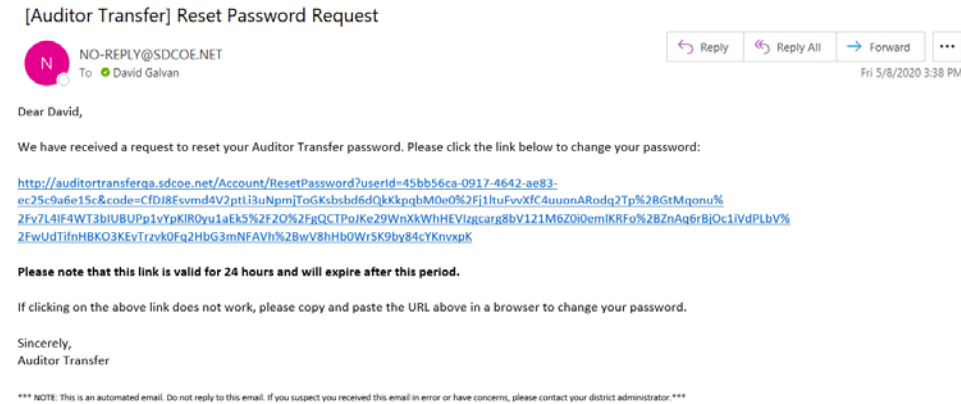
You can send an email to user to reset their password by clicking on the **Reset Password** button.



By clicking on the **Reset Password** button, a pop-up appears. Click **OK** to email the user a link to reset their password.



The user receives an email with the subject “[Auditor Transfer] Reset Password Request.”



Clicking on the email link to change the user’s password opens a page to reset their password.

Reset Password

Complete ALL fields below. Passwords must contain:

- At least **one** number
- At least **one** uppercase character
- At least **one** lowercase character
- At least **eight** characters in length

Email

Password

Confirm Password

Submit

The user needs to enter their email address and a new password. Both Password and Confirm Password fields need to match before submitting a reset password request. Then click on the **Submit** button to submit their request.

Once the reset password submission is successful, a page opens prompting the user to login using their new password.

Success!

Your password has been updated! You may now login to the system with your updated password. If you have any questions, please contact your district administrator.

[Login Now](#)

Announcements

Announcements are messages that appear on the district web site home page. The messages are for all districts and charters users accessing the district web site.

Announcement ▼
This is test announcement for AT district portal
1 - 1 of 1 items

The announcements are set by auditor transfer administrators.

Search Archives (Auditor Transfers processed prior to July 2020)

The search archives page has two parts: a search form that allows you to search posted auditor transfers for your districts; and a list of posted auditor transfers prior to July 2020.

Search ATs processed prior to July 2020

Fiscal Year:	Charter School or District	AT Number From A:	AT Number To A:
19	21 - LEMON GROVE	A 17	A 17
Dist. Reference No.	From Posted Date:	To Posted Date:	
	mm / dd / yyyy	mm / dd / yyyy	
Search	Reset		

Drag a column header and drop it here to group by that column

Fiscal Year	AT Number	Dist. Reference No.	REF	Date Created	Date posted		
19	A000017	PS709056 FY1819 ESSA	FY1819 ESSA T-IV S	07/03/2019	07/03/2019	Attachments	Report

1 - 1 of 1 items

The search form allows you to search for posted auditor transfers for your districts using the following parameters:

- Fiscal year
- Charter School or District
- Starting from Auditor Transfer number
- Ending to Auditor Transfer number
- From posted date
- To posted date

After you enter your search parameters, click on the **Search** button to view the results of your search. The search parameters are cumulative: the search results are based on all the parameters you choose to use as search criteria.

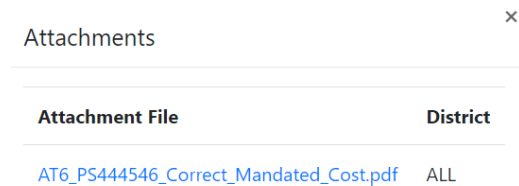
The list of posted auditor transfers gives you the option to view attachments for each auditor transfer, if any. The list of auditor transfers also allows you to view a report of each auditor transfer that shows the transactions for each auditor transfer. By default, the list shows posted auditor transfers from the most recent fiscal year.

Attachments

You view attachments for an auditor transfer by clicking on the **Attachments** button in the auditor transfer list.

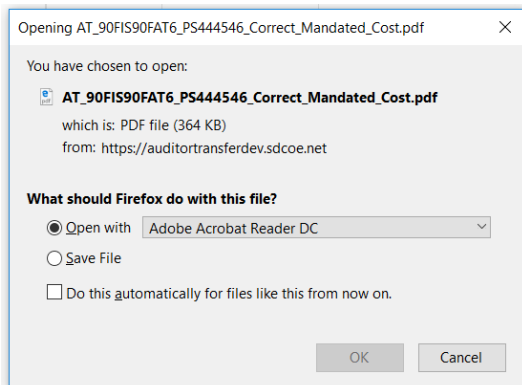
Attachments

A popup then appears with a link to the attachment file.



Attachment File	District
AT6_PS444546_Correct_Mandated_Cost.pdf	ALL

And clicking on the Attachment file link allows you to download the file. Depending on the file format, you may be asked to download needed software to open the file if you don't already have the software.

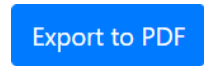


Report

You view a list of transactions for an auditor transfer by clicking on the **Report** button in the auditor transfer list.

Report

You can export the report to PDF by clicking on the **Export to PDF** button found in the top upper left-hand corner of the report page.



View/Search

The View/Search Auditor Transfers page has two parts: a search form that allows you to search posted Auditor Transfers for your districts; and a list of posted auditor transfers for fiscal year 2020 onwards.

View Auditor Transfers

Charter School or District: 21 - LEMON GROVE

AT Number: A 005010

Start Post Date: mm / dd / yyyy

Ending Post Date: mm / dd / yyyy

Search

Drag a column header and drop it here to group by that column

AT Number	Journal Id	Description	Date Created	Date Posted	Attachment	Final Doc
A005010	0000817046	STATE WH OFF CYCLE DATED 06/05/20	05 Jun 2020	05 Jun 2020	Attachments	Report

1 - 1 of 1 items

The search form allows you to search for posted auditor transfers for your district using the following parameters:

- Charter School or District
- Auditor Transfer number
- Start Post Date
- Ending Post Date

After you enter your search parameters, click on the Search button to view the results of your search. The search parameters are cumulative: the search results are based on all the parameters you choose to use as search criteria.

The list of posted auditor transfers gives you the option to view attachments for each auditor transfer, if any. The list of auditor transfers also allows you to view a report of each auditor transfer that shows the transactions for each auditor transfer.

Attachments

You can view attachments for an auditor transfer by clicking on the **Attachments** button in the auditor transfer list.

Attachments

A popup then appears with a links to the attachment files.

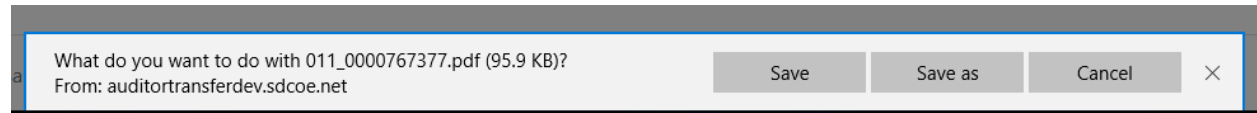
Auditor Transfer Attachments: ×

0000808642	A004576	011_0000767377.pdf
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0000808642	A004576	Correct_online_011_0000767377.pdf
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Close

And clicking on the Attachment file link allows you to download the file.



What do you want to do with 011_0000767377.pdf (95.9 KB)?
From: auditortransferdev.sdcoe.net

Save Save as Cancel ×

Report

Report

You can view **REQUISITION ON COUNTY AUDITOR FOR INTERFUND CASH TRANSFER** report for each Journal id, Auditor Transfer and Posted Date with a list of transaction for an auditor transfer by clicking on the Report button in the auditor transfer list.

You can also export the report to pdf by clicking on the **Export to PDF** button located in the upper left-hand corner of the report.