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.

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).

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

[Image of District Accounts page]
Add New User

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

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

Add New District User

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**: David
- **Last Name**: Galvan
- **Phone**: 8582923062
- **Title**: Web developer
- **Role**: AT District Admin
- **Charter Schools or Districts**: 21 - LEMON GROVE

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.”

Dear [Name],

We have received a request to reset your Auditor Transfer password. Please click the link below to change your password:

http://auditortransferexample.com/ResetPassword?resetToken=abcd1234

Please note that this link is valid for 24 hours and will expire after this period.

If clicking on the above link does not work, please copy and paste the URL above in a browser to change your password.

Sincerely,
Auditor Transfer

*** NOTE: If you received this email in error or have concerns, please contact your district administrator. ***

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

![Reset Password Form](image)

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 Message](image)
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.

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.

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 button](image)

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

<table>
<thead>
<tr>
<th>Attachment File</th>
<th>District</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT6_PS444546_Correct_Mandated_Cost.pdf</td>
<td>ALL</td>
</tr>
</tbody>
</table>

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.

![Opening file popup](image)

**Report**

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

![Report button](image)
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**

<table>
<thead>
<tr>
<th>AT Number</th>
<th>Journal Id</th>
<th>Description</th>
<th>Date Created</th>
<th>Date Posted</th>
<th>Attachment</th>
<th>Final Doc</th>
</tr>
</thead>
<tbody>
<tr>
<td>A005010</td>
<td>0000817046</td>
<td>STATE WH OFF CYCLE DATED  06/05/20</td>
<td>05 Jun 2020</td>
<td>05 Jun 2020</td>
<td>Attachment</td>
<td>Report</td>
</tr>
</tbody>
</table>

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.

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

<table>
<thead>
<tr>
<th>Auditor Transfer Attachments:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>00000006642</td>
<td>A004576</td>
</tr>
<tr>
<td>00000006642</td>
<td>A004576</td>
</tr>
</tbody>
</table>

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

**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.