Kansas State Department of Education
_____
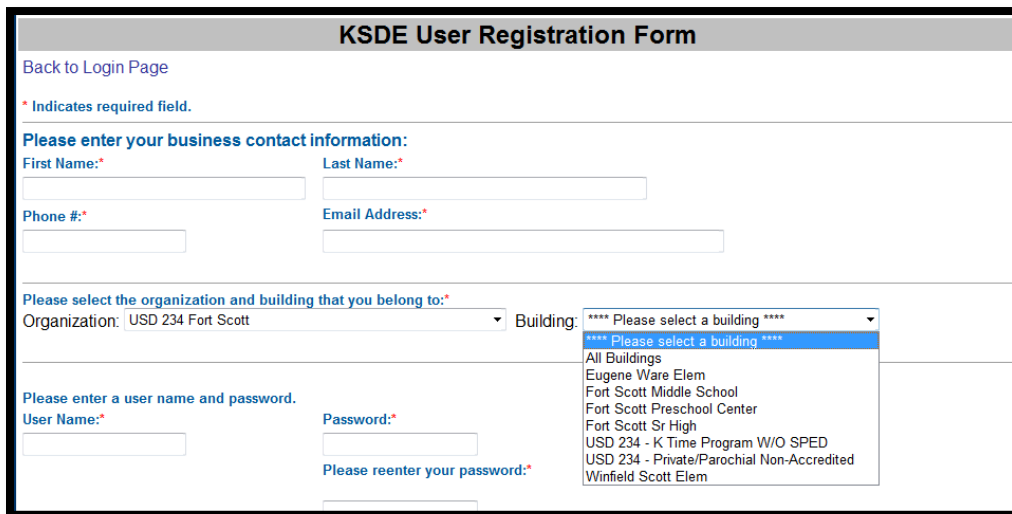
Auditor File Exchange User's Guide

December 18, 2014
Version 1.0

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1 INTRODUCTION

The Auditor File Exchange application is a method for school districts and the KSDE Auditors to share information needed for Auditing purposes in a safe, secure environment. Users will be able to upload various types of documents for a specific district and have that data available to the KSDE Auditors and school district personnel only.

1.1 Available User Access Levels

This table shows the available access levels and the functions available for each.

Access Level	Upload Files	Download Files	Delete Files	Run Reports
District Level	X	X		
CNW Consultant	X			
State Auditor Entry	X	X	X	X
KSDE Admin	X	X	X	X

2 REGISTERING FOR ACCESS TO AUDITOR FILE EXCHANGE

Individuals who do not have access to KSDE web applications need to register via KSDE Common Authentication. Use the following web address: https://online.ksde.org/authentication/login.aspx. At this website, click on the "Register" button.

NOTE:	You may want to skip this section if you have used Auditor File Exchange before, or if you already registered for access to Auditor File Exchange.

On the Registration page, enter your business contact information (First Name, Last Name, Phone #, and Email Address). Next, select your organization from the "Organization" drop-down list. This is a State Level or District Level application only. If you will be a user at the district-level, select the "All Buildings" option under the "Building" field. If you will be a state-level user, select "KSDE" as the Organization. No building will be available to be selected.

| NOTE: | Multi-district access is not an option with the Auditor File Exchange. A separate username and password is required for each district. |

A list of available applications for the organization you selected is now displayed. Scroll down to "Auditor File Exchange" and select the checkbox in the first column to choose that application. From the Application Access Level column, select the level that is appropriate for you. The following example displays district-level options since "All Buildings" was selected from the "Building" drop-down list.

Login ID

Enter a user name and password (login ID). You determine your login ID, but you should not use spaces. You will also determine your password, but be sure to follow the password requirements that are shown on the screen.

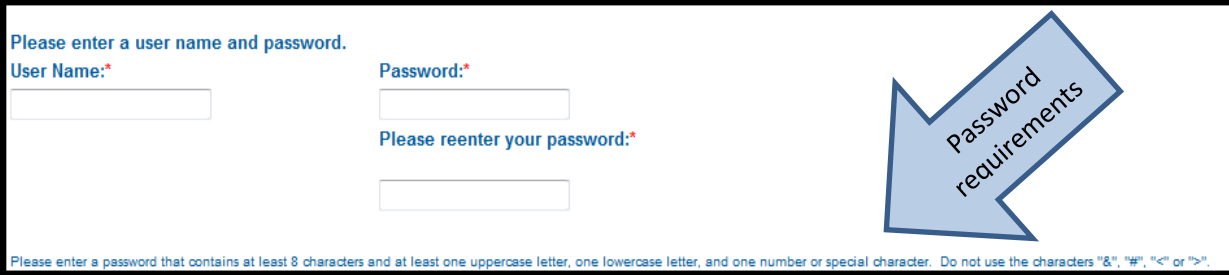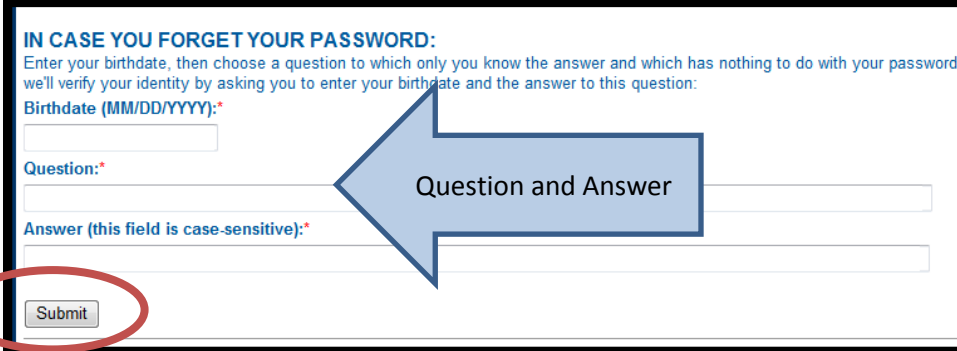| TIP:	You will need to remember the Login ID, password, security question/answer, and birth date that you entered. KSDE does not store this information for you.

Security Questions

When registering for any application you are required to provide two pieces of security information. These are used to help retrieve your password if you forget it, or to make any subsequent changes to your login once it has been established. First, enter your birthdate following the format shown on screen. Second, enter a security question and answer.

When you have completed all required information on the registration form, click the "Submit" button at the bottom of the screen.

If all data on the registration form is valid, you will get a message that says "Thank You for Registering." The registration request will be forwarded to the district superintendent for approval. You will receive an email when your access request is approved and your username and password are ready for use.

Existing Login ID: Individuals who already have access to KSDE web applications can use the Manage My Account option to add the Auditor File Exchange to their list of applications. As with all KSDE web applications, the district superintendent will receive a request for approval before access is granted.

To add the Auditor File Exchange to your list of available KSDE web applications…
- Login on the KSDE Web Applications page
- Click the "Manage My Account" link
- Check the box in front of Auditor File Exchange

- Select your access level (school or district and update or read-only)
- Click **Submit**

Your request will be sent to the district superintendent for approval. When approved, you will receive an email indicating that you can access the Auditor File Exchange.

TIP:	If you forget your KSDE web applications password, click on the link that says "Forgot Your Password?" on the Authentication screen. Supply the correct answers to the security questions and enter a new password. Keep in mind that KSDE does not know your password, so you are responsible for managing and remembering it.

3   LOGGING INTO THE AUDITOR FILE EXCHANGE

The Auditor File Exchange, like other KSDE web applications, is available on the KSDE Common Authentication page. To access the KIDS System, enter your KSDE username and password to https://online.ksde.org/authentication/login.aspx. You will see the Auditor File Exchange on your list of approved KSDE applications (example list shown below), and you will need to click on the application to open it.
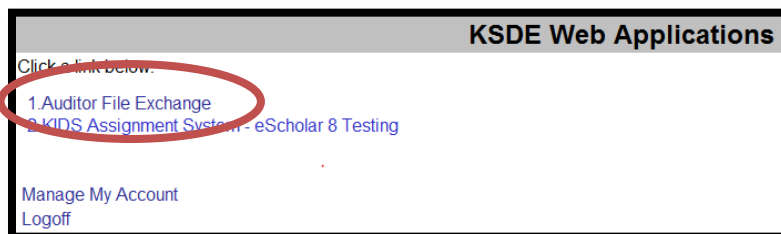
NOTE:	Some of the applications may be grayed out. This means that they are either not active applications, or that you have not yet been approved for access to those applications.

After clicking on the link for the Auditor File Exchange, you will see the Auditor File Exchange Manage Files page.

4 DISTRICT ENTRY USER ACCESS LEVEL

4.1 Uploading Files

1. Navigate to the "Manage Files" page in the application menu.
2. Select file to upload by locating the file on your computer (box "A").
   - Currently allowed file extensions are .doc, docx, .pdf, .xlsx, .xlsm, .xls, .accdb, .csv, and .txt.
3. Select the Fiscal Year for the file being uploaded. The current and previous 2 fiscal years will be selectable from the dropdown (box "B").
4. Select the district for the file being uploaded. For a district level user, this will be populated with your district only (box "C").
5. Click the "Upload" button (box "D") once. Your file will be uploaded and you will receive confirmation once it is complete.

4.2 View/Download Files

1. Navigate to the "Manage Files" page in the application menu
2. *Optional* - Select Fiscal Year to filter from the dropdown box (box "B"). Page will update after making a selection to apply the filter to the results.
3. Click the "Filename" link for the file you wish to see (box "C"). A prompt will appear for you to save the file. Note: the filename will change to: <District #>_FY<fiscal year>_<File Name>_(<Current date>). You can change this to whatever you wish to call the file on your computer.

Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:

From Microsoft Word:

Click OK. There is nothing wrong with the file. You may then get this message:

Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.

From Microsoft Excel:

Click Yes, there is no problem with the file. The file will then open in Excel in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.

5 CNW CONSULTANT USER ACCESS LEVEL

5.1 Uploading Files

1. Navigate to the "Manage Files" page in the application menu.
2. Select file to upload by locating the file on your computer (box "A").
   - Currently allowed file extensions are .doc, docx, .pdf, .xlsx, .xlsm, .xls, .accdb, .csv, and .txt.
3. Select the Fiscal Year for the file being uploaded. The current and previous 2 fiscal years will be selectable from the dropdown (box "B").
4. Select the district for the file being uploaded. For a district level user, this will be populated with your district only (box "C").
5. Click the "Upload" button (box "D") once. Your file will be uploaded and you will receive confirmation once it is complete.

5.2 View/Download Files

1. Navigate to the "Manage Files" page in the application menu
2. *Optional* - Select District to filter from the dropdown box (box "A"). Page will update after making a selection to apply the filter to the results.
3. *Optional* - Select Fiscal Year to filter from the dropdown box (box "B"). Page will update after making a selection to apply the filter to the results.
4. Click the "Filename" link for the file you wish to see (box "C"). A prompt will appear for you to save the file. Note: the filename will change to: <District #>_FY<fiscal year>_<File Name>_(<Current date>). You can change this to whatever you wish to call the file on your computer.
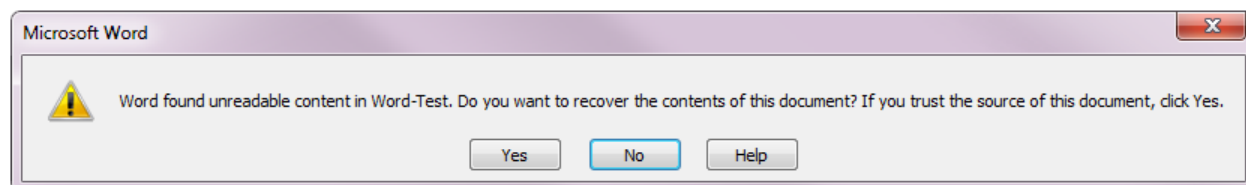

Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:
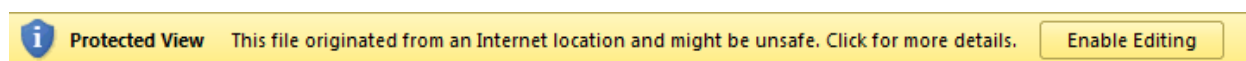
From Microsoft Word:

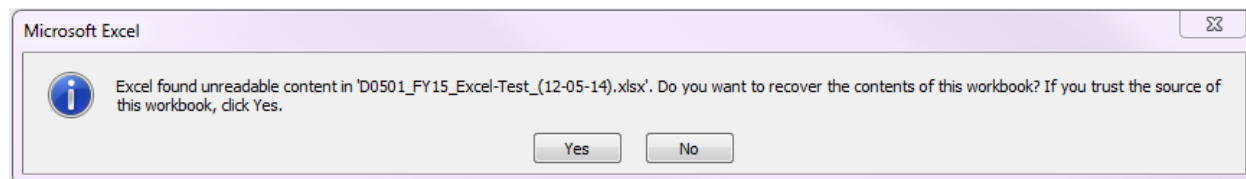Click OK. There is nothing wrong with the file. You may then get this message:

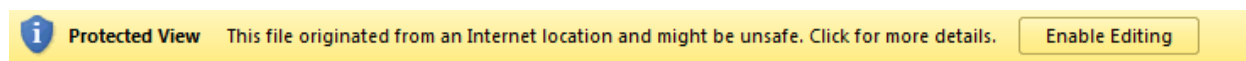Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.

From Microsoft Excel:

Click Yes, there is no problem with the file. The file will then open in Excel in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.

6 STATE AUDITOR ENTRY USER ACCESS LEVEL

6.1 Uploading Files

1. Navigate to the "Manage Files" page in the application menu.
2. Select file to upload by locating the file on your computer (box "A").
   - Currently allowed file extensions are .doc, docx, .pdf, .xlsx, .xlsm, .xls, .accdb, .csv, and .txt.
3. Select the Fiscal Year for the file being uploaded. The current and previous 3 fiscal years will be selectable from the dropdown (box "B").
4. Select the district for the file being uploaded. Only districts for which you have received authorization will be displayed in this dropdown (box "C").

5. Click the "Upload" button (box "D") once. Your file will be uploaded and you will receive confirmation once it is complete.
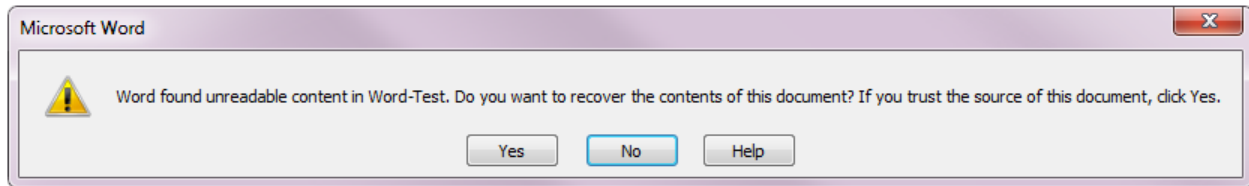
6.2 View/Download Files

1. Navigate to the "Manage Files" page in the application menu
2. *Optional* - Select District to filter from the dropdown box (box "A"). Page will update after making a selection to apply the filter to the results.
3. *Optional* - Select Fiscal Year to filter from the dropdown box (box "B"). Page will update after making a selection to apply the filter to the results.
4. Click the "Filename" link for the file you wish to see (box "C"). A prompt will appear for you to save the file. Note: the filename will change to: <District #>_FY<fiscal year>_<File Name>_(<Current date>).   You can change this to whatever you wish to call the file on your computer.

Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:
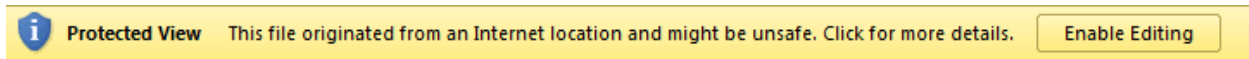
From Microsoft Word:

Click OK. There is nothing wrong with the file. You may then get this message:
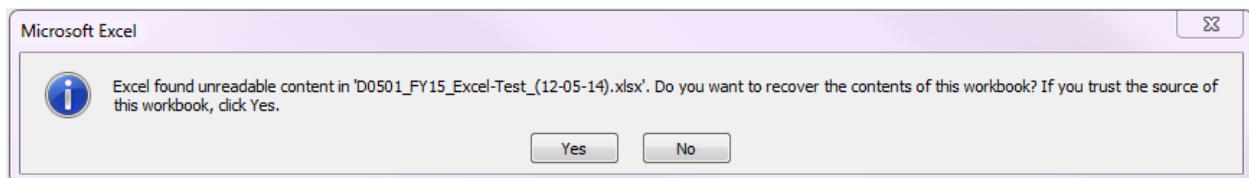

Click Yes, there is no problem with the file. The file will then open in Word in Protected View.
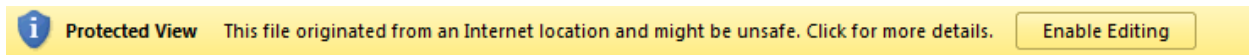
In order to save or modify the document, you will need to click the "Enable Editing" button.

From Microsoft Excel:

Click Yes, there is no problem with the file. The file will then open in Excel in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.
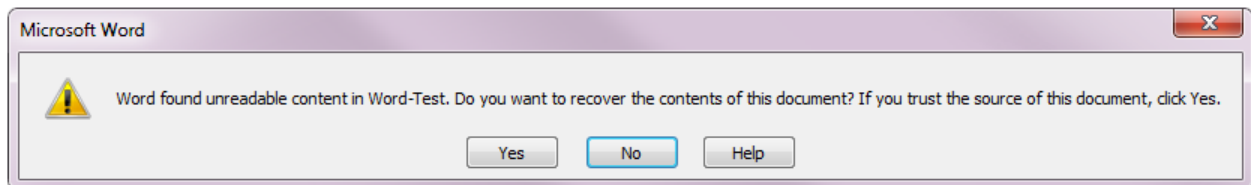
6.3 Delete Files

1. Navigate to the "Manage Files" page in the application menu
2. *Optional* - Select District to filter from the dropdown box (box "A"). Page will update after making a selection to apply the filter to the results.
3. *Optional* - Select Fiscal Year to filter from the dropdown box (box "B"). Page will update after making a selection to apply the filter to the results.
4. Select the checkbox under "Delete" for the files you wish to delete (box "C"). Note: you can select more than 1 to delete at once.
5. Click the "Delete" button (box "D"). A popup box will appear and ask you to verify that you wish to delete the files. Selecting OK will delete the files you checked.

6.4 Create User Report

1. Navigate to the "Create Report" page in the application menu.
2. Select a user from the dropdown menu (box "A"). Note: only users that have activity for a district you are authorized for will appear in the dropdown.
3. Select a starting date by either typing it in (MM/DD/YYYY) or selecting it from the calendar popup tool (box "B").
4. Select a ending date by either typing it in (MM/DD/YYYY) or selecting it from the calendar popup tool (box "C").
5. Click the "Generate" button (box "D"). Data in the report will appear in a table:

District	Fiscal Year	Filename	Date	Action
USD 104 - White Rock	2009 - 2010	bigdoc.docx	6/2/2011 4:33:26 PM	Delete
D0725 - Cowley County Special Services Cooperative	2010 - 2011	PIX-VPN Config.pdf	6/2/2011 4:33:26 PM	Delete
USD 489 - Hays	2011 - 2012	Undue Burden Form.docx	6/2/2011 4:33:35 PM	Delete
1 ▾				Page Size: 10 ▾

Export to Excel   Export to PDF   E

6. Click the export type (Excel or PDF) to save a copy of the report to your computer (box "E").

6.5 Create District Report

1. Navigate to the "Create Report" page in the application menu.
2. Select a district from the dropdown box (box "A"). Note: only districts for which you have been authorized will appear in this dropdown.
3. Select a fiscal year from the dropdown box (box "B").
4. Click the "Generate" button (box "C"). Data in the report will appear in a table:

User	Filename	Date	Action
Linda Smith	Undue Burden Form.docx	6/2/2011 4:26:54 PM	Upload
Linda Smith	Undue Burden Form.docx	6/2/2011 4:33:35 PM	Delete

1

Export to Excel   Export to PDF   D

5. Click the export type (Excel or PDF) to save a copy of the report to your computer (box "D").

7 KSDE ADMIN USER ACCESS LEVEL

7.1 Uploading Files

Manage Files   A   B   C   D

File to Upload: [_____] Browse_   FY: 2011 - 2012 ▾   District: ▾   Upload

1. Navigate to the "Manage Files" page in the application menu.
2. Select file to upload by locating the file on your computer (box "A").
   - Currently allowed file extensions are .doc, docx, .pdf, .xlsx, .xlsm, .xls, .accdb, .csv, and .txt.
3. Select the Fiscal Year for the file being uploaded. The current and previous 2 fiscal years will be selectable from the dropdown (box "B").
4. Select the district for the file being uploaded. For a district level user, this will be populated with your district only (box "C").
5. Click the "Upload" button (box "D") once. Your file will be uploaded and you will receive confirmation once it is complete.

7.2 View/Download Files

Filter   A   B

District: All Districts ▾   Fiscal Year: All Years ▾
              C

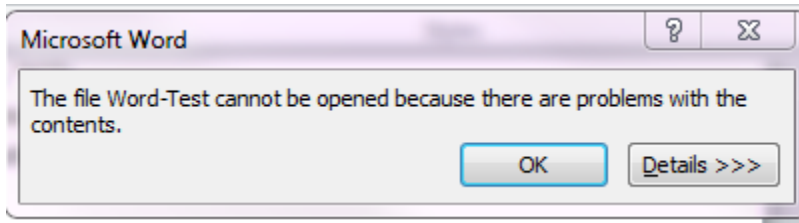| Filename	District	FY	Uploaded By	Date Added
UndueBurdenFinal_v4.pdf	USD 489 - Hays	2010 - 2011	Linda Smith	6/2/2011 4:31:49 PM

5. Navigate to the "Manage Files" page in the application menu
6. *Optional* - Select District to filter from the dropdown box (box "A"). Page will update after making a selection to apply the filter to the results.
7. *Optional* - Select Fiscal Year to filter from the dropdown box (box "B"). Page will update after making a selection to apply the filter to the results.

8. Click the "Filename" link for the file you wish to see (box "C"). A prompt will appear for you to save the file. Note: the filename will change to: <District #>_FY<fiscal year>_<File Name>_(<Current date>). You can change this to whatever you wish to call the file on your computer.
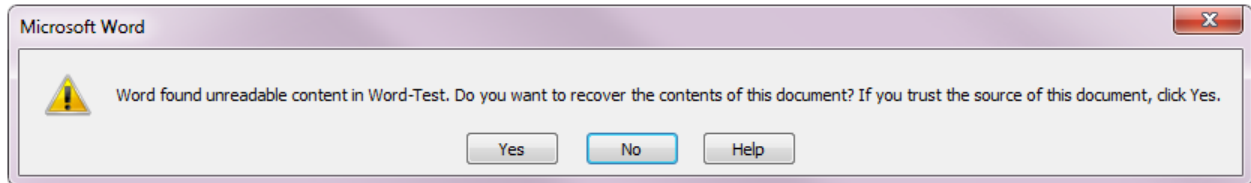
Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:
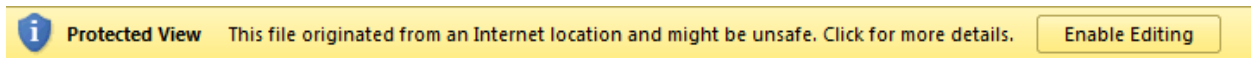
From Microsoft Word:

Click OK. There is nothing wrong with the file. You may then get this message:

Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.
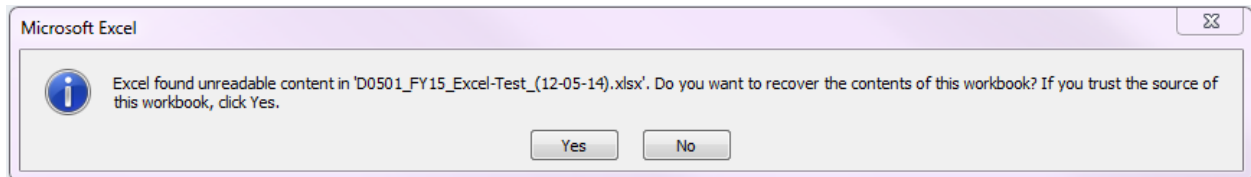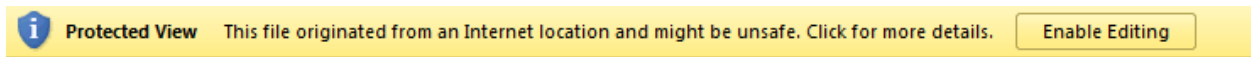
From Microsoft Excel:

Click Yes, there is no problem with the file. The file will then open in Excel in Protected View.

In order to save or modify the document, you will need to click the "Enable Editing" button.

7.3 Delete Files

1. Navigate to the "Manage Files" page in the application menu
2. *Optional* - Select District to filter from the dropdown box (box "A"). Page will update after making a selection to apply the filter to the results.
3. *Optional* - Select Fiscal Year to filter from the dropdown box (box "B"). Page will update after making a selection to apply the filter to the results.
4. Select the checkbox under "Delete" for the files you wish to delete (box "C"). Note: you can select more than 1 to delete at once.
5. Click the "Delete" button (box "D"). A popup box will appear and ask you to verify that you wish to delete the files. Selecting OK will delete the files you checked.

7.4 Create User Report

1. Navigate to the "Create Report" page in the application menu
2. Select a user from the dropdown menu (box "A").
3. Select a starting date by either typing it in (MM/DD/YYYY) or selecting it from the calendar popup tool (box "B")
4. Select a ending date by either typing it in (MM/DD/YYYY) or selecting it from the calendar popup tool (box "C")
5. Click the "Generate" button (box "D"). Data in the report will appear in a table:

District	Fiscal Year	Filename	Date	Action
USD 104 - White Rock	2009 - 2010	bigdoc.docx	6/2/2011 4:33:26 PM	Delete
D0725 - Cowley County Special Services Cooperative	2010 - 2011	PIX-VPN Config.pdf	6/2/2011 4:33:26 PM	Delete
USD 489 - Hays	2011 - 2012	Undue Burden Form.docx	6/2/2011 4:33:35 PM	Delete
1 ▾				Page Size: 10 ▾

Export to Excel   Export to PDF   E

6. Click the export type (Excel or PDF) to save a copy of the report to your computer (box "E").

7.5 Create District Report

District Report
District: D0104 ▾   Fiscal Year: 2011 - 2012 ▾   Generate
    A   B   C

1. Navigate to the "Create Report" page in the application menu
2. Select a district from the dropdown box (box "A"). Note: only districts for which you have been authorized will appear in this dropdown.
3. Select a fiscal year from the dropdown box (box "B").
4. Click the "Generate" button (box "C"). Data in the report will appear in a table:

User	Filename	Date	Action
Linda Smith	Undue Burden Form.docx	6/2/2011 4:26:54 PM	Upload
Linda Smith	Undue Burden Form.docx	6/2/2011 4:33:35 PM	Delete
1			

Export to Excel   Export to PDF   D

5. Click the export type (Excel or PDF) to save a copy of the report to your computer (box "D").