

Auditor File Exchange User's Guide

October 1, 2020
Version 3.1

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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

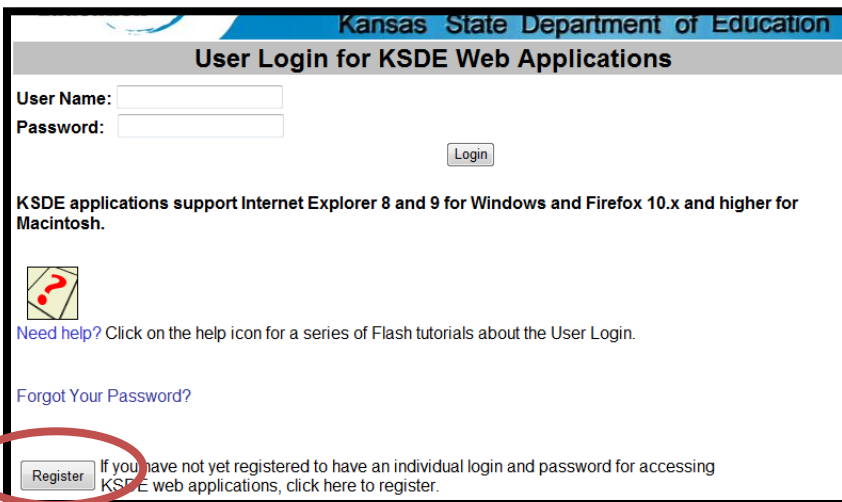
This table shows the available access levels and the functions available for each.

Access Level	Upload Files	Download Files	Delete Files	Run Reports
District Entry	X	X	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.



Kansas State Department of Education


User Login for KSDE Web Applications

User Name:

Password:

Login

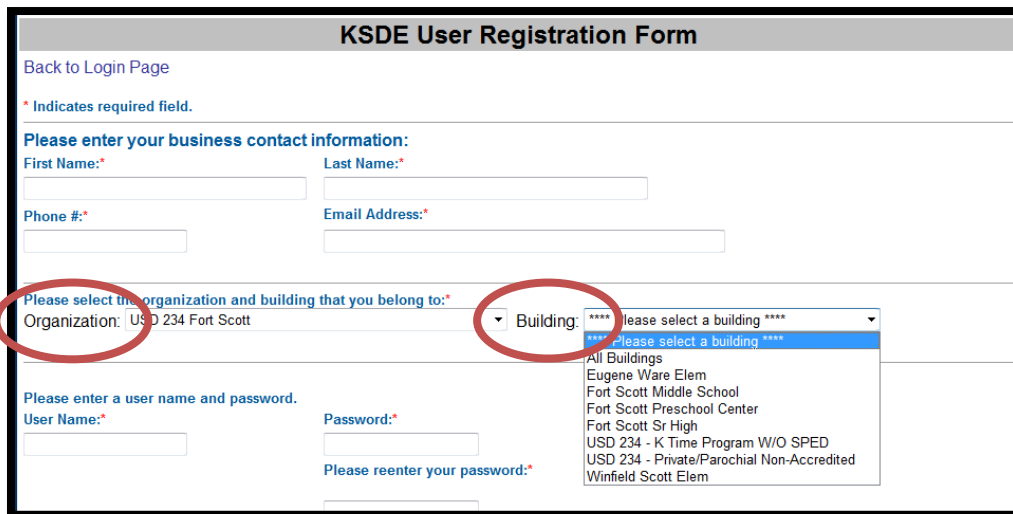
KSDE applications support Internet Explorer 8 and 9 for Windows and Firefox 10.x and higher for Macintosh.

 Need help? Click on the help icon for a series of Flash tutorials about the User Login.

[Forgot Your Password?](#)

[Register](#) If you have not yet registered to have an individual login and password for accessing KSDE web applications, click here to register.

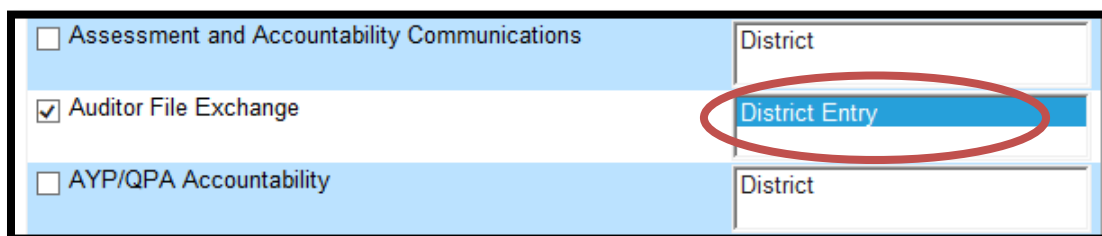
On the Registration page, enter your business contact information (First Name, Last Name, Phone #, and Email Address). Next, select your organization from the “Organization” drop-down list. This is a State Level or District Level application only. If you will be a user at the district-level, select the “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.



The screenshot shows the 'KSDE User Registration Form'. It includes fields for 'First Name', 'Last Name', 'Phone #', and 'Email Address'. Below these are 'Organization' and 'Building' dropdown menus. The 'Organization' dropdown is set to 'USD 234 Fort Scott'. The 'Building' dropdown is open, showing options like 'All Buildings', 'Eugene Ware Elem', 'Fort Scott Middle School', 'Fort Scott Preschool Center', 'Fort Scott Sr High', 'USD 234 - K Time Program W/O SPED', 'USD 234 - Private/Parochial Non-Accredited', and 'Winfield Scott Elem'. At the bottom, there are fields for 'User Name', 'Password', and 'Please reenter your password'.

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.



This screenshot shows a table of application access levels for the 'District' level. The table has two columns: 'Application' and 'Access Level'. The 'Auditor File Exchange' application is selected with a checked checkbox, and the 'District Entry' access level is highlighted in blue.

Application	Access Level
<input type="checkbox"/> Assessment and Accountability Communications	District
<input checked="" type="checkbox"/> Auditor File Exchange	District Entry
<input type="checkbox"/> AYP/QPA Accountability	District

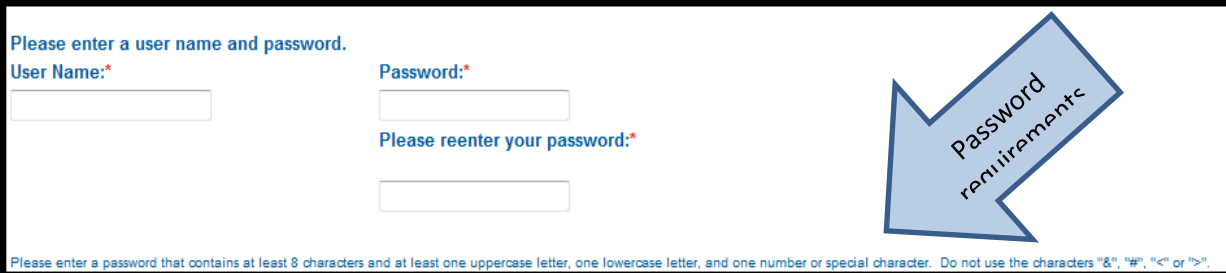


This screenshot shows a table of application access levels for the 'State' level. The table has two columns: 'Application' and 'Access Level'. The 'Auditor File Exchange' application is selected with a checked checkbox, and the 'State Auditor Entry' access level is highlighted in blue.

Application	Access Level
<input type="checkbox"/> Auditor App 2015	State Update State Admin
<input checked="" type="checkbox"/> Auditor File Exchange	State Auditor Entry KSDE Admin

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.



Please enter a user name and password.

User Name:*

Password:*

Please reenter your password:*

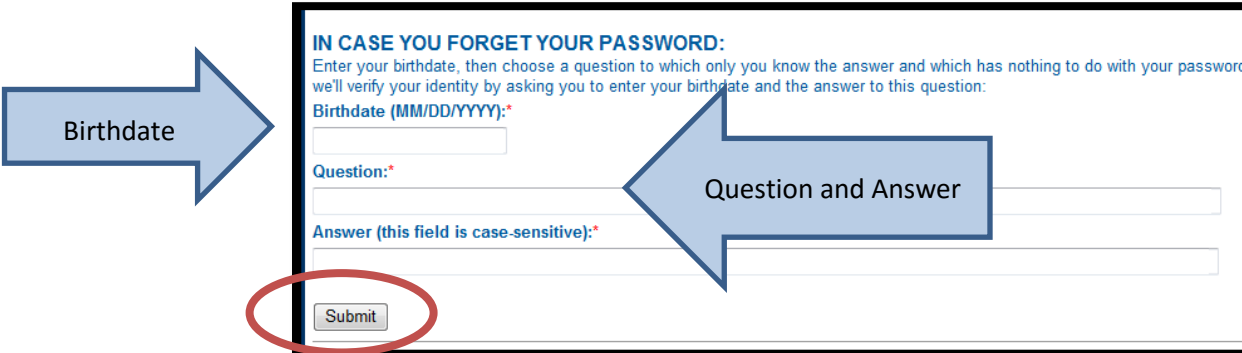
Please enter a password that contains at least 8 characters and at least one uppercase letter, one lowercase letter, and one number or special character. Do not use the characters "&", "#", "<" or ">".

password requirements

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.



Birthdate

IN CASE YOU FORGET YOUR PASSWORD:
Enter your birthdate, then choose a question to which only you know the answer and which has nothing to do with your password we'll verify your identity by asking you to enter your birthdate and the answer to this question:

Birthdate (MM/DD/YYYY):*

Question:*

Answer (this field is case-sensitive):*

Submit

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**

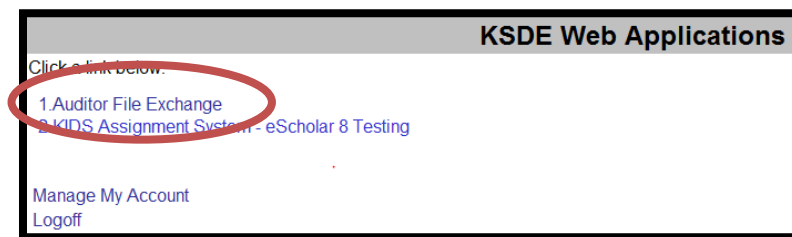


Your request will be sent to the district superintendent for approval. When approved, you will receive an email indicating that you can access the Auditor File Exchange.

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

Upload File

File to Upload: A

Browse...

FY: B

2015 - 2016

District: C

D0101

D

Upload

District name selected: USD 101 - Erie-Galesburg

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

4.2 View/Download Files

Filter

District: A

All Districts

Fiscal Year: B

All Years

D

C

Select	Filename	District	FY	Uploaded By	Date Added	Last Downloaded By	Last Downloaded Date
<input type="checkbox"/>	Word-Test.docx	USD 101 - Erie-Galesburg	2014 - 2015	Julie Cook	12/1/2014 2:08:54 PM	Kevin Mercer	9/2/2015 11:08:56 PM
<input type="checkbox"/>	KIDS Data flow.docx	USD 208 - Wakeeney	2014 - 2015	Julie Cook	12/4/2014 12:06:56 PM	Julie Cook	9/28/2015 3:52:33 PM

Download

Select All

Clear

Delete

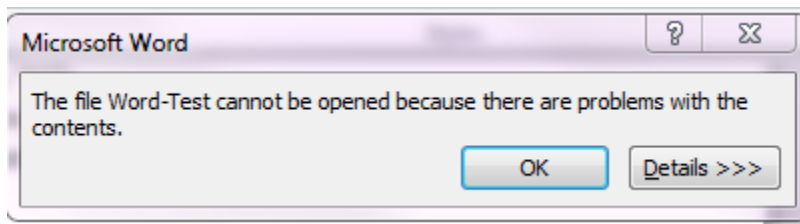
1. Navigate to the “Manage Files” page in the application menu
2. *Optional* - Select District to filter from the dropdown box (“A”). Page will update after making a selection to apply the filter to the results.

3. *Optional* - Select Fiscal Year to filter from the dropdown box ("B"). Page will update after making a selection to apply the filter to the results.
4. To download one file, click the "Filename" link for the file you wish to see ("C"). A prompt will appear for you to open or save the file.
5. To download multiple files, select the checkbox under "Select" for the files you wish to download ("D") or click the Select All button and then click the Download button at the bottom of the page. A prompt will appear for you to open or save the files. The files will be in a zip file.
6. Note: When you save the documents 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.

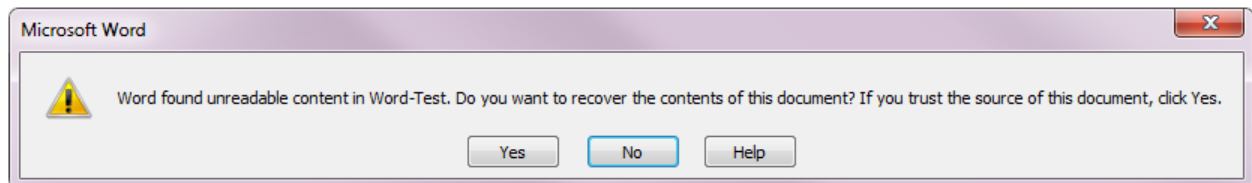


Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:

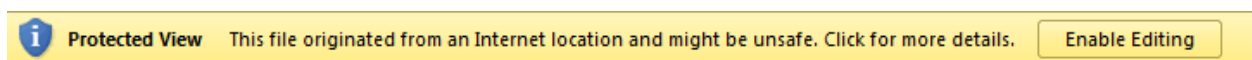
From Microsoft Word:



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

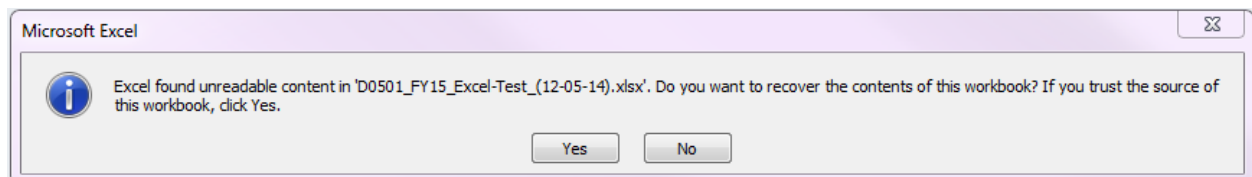


Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

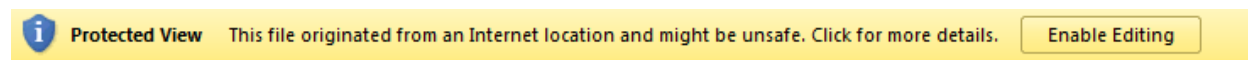


In order to save or modify the document, you will need to click the "Enable Editing" button.

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.

4.3 Create User Report

User Report

User:

Kevin Mercer

▼

A

Start Date: B

End Date: C

D

Generate

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

District	Fiscal Year	Filename	Date	Action
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.txt	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.xlsx	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:05:40 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.txt	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.xlsx	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2014 - 2015	Word-Test.docx	9/2/2015 11:08:56 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	Excel-Test.xlsx	9/2/2015 11:09:51 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	Excel-Test.xlsx	9/2/2015 11:12:37 PM	Download

1 ▼ > >|

Page Size: 10 ▼

Export to Excel

Export to PDF

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

4.4 Create District Report

District Report

District: A

D0101

Fiscal Year: B

2015 - 2016

C

Generate

District name selected: USD 101 - Erie-Galesburg

Export to Excel

Export to PDF

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
Julie Cook	Word-Test.docx	10/8/2015 10:48:42 AM	Upload
Julie Cook	Word-Test.docx	10/8/2015 10:48:57 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 10:52:09 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 10:52:53 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 2:27:47 PM	Delete
1			

Export to Excel

Export to PDF

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

5 CNW CONSULTANT USER ACCESS LEVEL

5.1 Uploading Files

Upload File

File to Upload: **A** FY: **B** District: **C** **D**

Browse... 2015 - 2016 D0101 Upload

District name selected: USD 101 - Erie-Galesburg

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

5.2 View/Download Files

Filter

District: **A** Fiscal Year: **B**

All Districts All Years

D **C**

Select	Filename	District	FY	Uploaded By	Date Added	Last Downloaded By	Last Downloaded Date
<input type="checkbox"/>	Word-Test.docx	USD 101 - Erie-Galesburg	2014 - 2015	Julie Cook	12/1/2014 2:08:54 PM	Kevin Mercer	9/2/2015 11:08:56 PM
<input type="checkbox"/>	KIDS Data flow.docx	USD 208 - Wakeeney	2014 - 2015	Julie Cook	12/4/2014 12:06:56 PM	Julie Cook	9/28/2015 3:52:33 PM

Download **Select All** **Clear** **Delete**

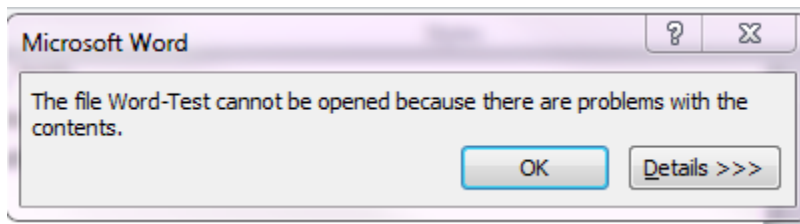
1. Navigate to the "Manage Files" page in the application menu
2. *Optional* - Select District to filter from the dropdown box ("A"). Page will update after making a selection to apply the filter to the results.

3. *Optional* - Select Fiscal Year to filter from the dropdown box ("B"). Page will update after making a selection to apply the filter to the results.
4. To download one file, click the "Filename" link for the file you wish to see ("C"). A prompt will appear for you to open or save the file.
5. To download multiple files, select the checkbox under "Select" for the files you wish to download ("D") or click the Select All button and then click the Download button at the bottom of the page. A prompt will appear for you to open or save the files. The files will be in a zip file.
6. Note: When you save the documents 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.

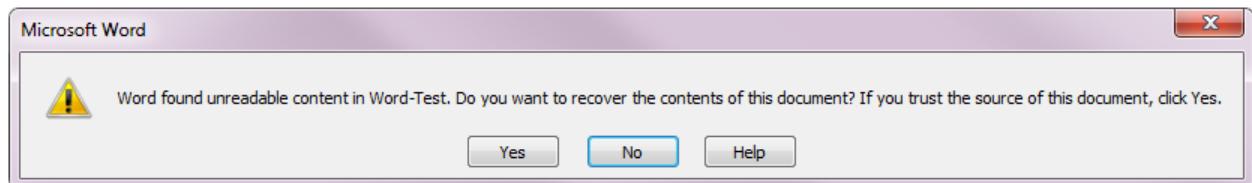


Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:

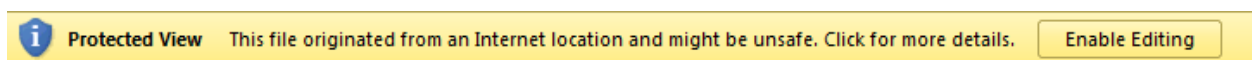
From Microsoft Word:



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

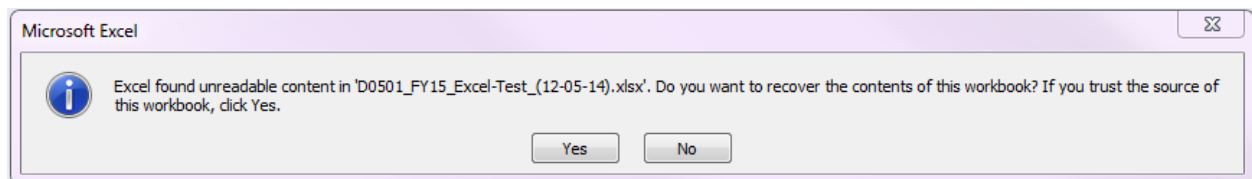


Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

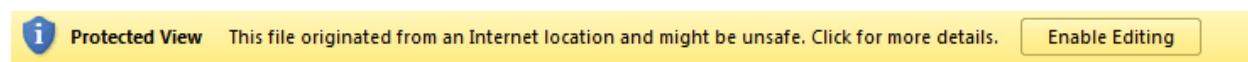


In order to save or modify the document, you will need to click the "Enable Editing" button.

From Microsoft Excel:



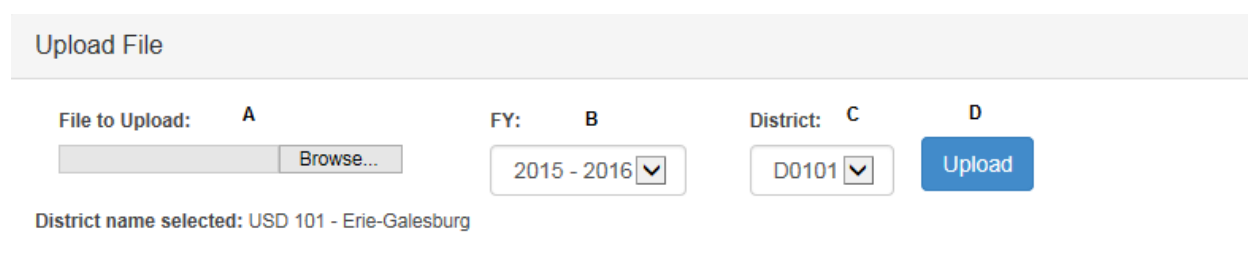
Click Yes, there is no problem with the file. The file will then open in Excel in Protected View.



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

A screenshot of a web form titled "Upload File". The form has four main sections labeled A, B, C, and D. Section A is "File to Upload:" with a text input field and a "Browse..." button. Section B is "FY:" with a dropdown menu showing "2015 - 2016". Section C is "District:" with a dropdown menu showing "D0101". Section D is a blue "Upload" button. Below these sections, it says "District name selected: USD 101 - Erie-Galesburg".

1. Navigate to the “Manage Files” page in the application menu.
2. Select file to upload by locating the file on your computer (“A”).
 - Currently allowed file extensions are .doc, docx, .pdf, .xlsx, .xlsm, .xls, .accdb, .csv, and .txt.
 - To select more than one file, hold down the CTRL or Shift Key to select more than one file to upload.
3. Select the Fiscal Year for the file being uploaded. The current and previous 3 fiscal years will be selectable from the dropdown (“B”).
4. Select the district for the file being uploaded. Only districts for which you have received authorization will be displayed in this dropdown (“C”).
5. Click the “Upload” button (“D”) once. Your file will be uploaded and you will receive confirmation once it is complete.

6.2 View/Download Files

Filter

District: A Fiscal Year: B

All Districts ▾ All Years ▾

D C

Select	Filename	District	FY	Uploaded By	Date Added	Last Downloaded By	Last Downloaded Date
<input type="checkbox"/>	Word-Test.docx	USD 101 - Erie-Galesburg	2014 - 2015	Julie Cook	12/1/2014 2:08:54 PM	Kevin Mercer	9/2/2015 11:08:56 PM
<input type="checkbox"/>	KIDS Data flow.docx	USD 208 - Wakeeney	2014 - 2015	Julie Cook	12/4/2014 12:06:56 PM	Julie Cook	9/28/2015 3:52:33 PM

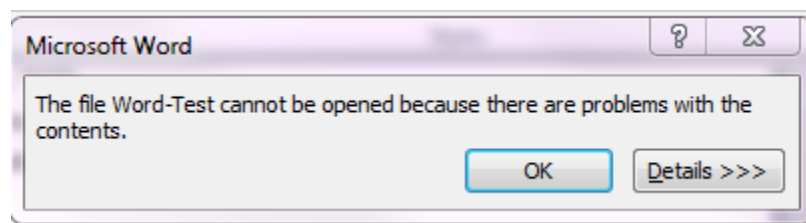
Download **Select All** **Clear** **Delete**

1. Navigate to the “Manage Files” page in the application menu
2. *Optional* - Select District to filter from the dropdown 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 (“B”). Page will update after making a selection to apply the filter to the results.
4. To download one file, click the “Filename” link for the file you wish to see (“C”). A prompt will appear for you to open or save the file.
5. To download multiple files, select the checkbox under “Select” for the files you wish to download (“D”) or click the Select All button and then click the Download button at the bottom of the page. A prompt will appear for you to open or save the files. The files will be in a zip file.
6. Note: When you save the documents 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.

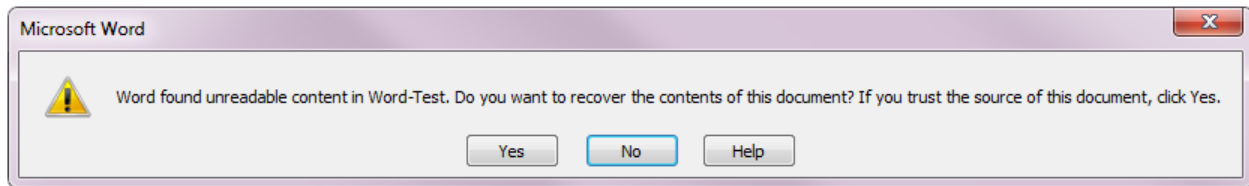


Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:

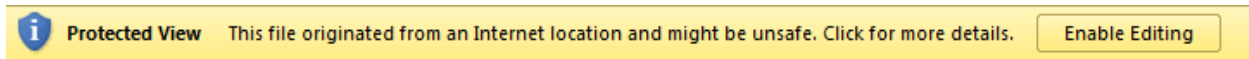
From Microsoft Word:



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

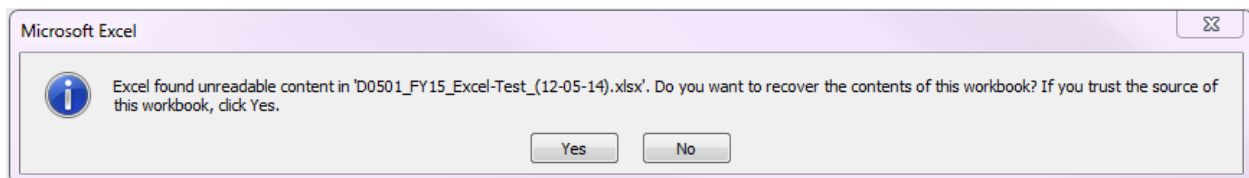


Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

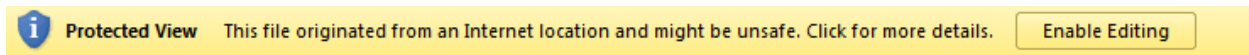


In order to save or modify the document, you will need to click the “Enable Editing” button.

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

Filter

District: A Fiscal Year: B

All Districts ▼ All Years ▼

D C

Select	Filename	District	FY	Uploaded By	Date Added	Last Downloaded By	Last Downloaded Date
<input type="checkbox"/>	Word-Test.docx	USD 101 - Erie-Galesburg	2014 - 2015	Julie Cook	12/1/2014 2:08:54 PM	Kevin Mercer	9/2/2015 11:08:56 PM
<input type="checkbox"/>	KIDS Data flow.docx	USD 208 - Wakeeney	2014 - 2015	Julie Cook	12/4/2014 12:06:56 PM	Julie Cook	9/28/2015 3:52:33 PM

Download Select All Clear **Delete**

1. Navigate to the “Manage Files” page in the application menu
2. *Optional* - Select District to filter from the dropdown 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 (“B”). Page will update after making a selection to apply the filter to the results.
4. Select the checkbox under “Select” for the files you wish to delete (“C”). Note: you can select more than 1 to delete at once.
5. Click the “Delete” button (“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

User Report

User:

Kevin Mercer

▼

A

Start Date: B

End Date: C

D

Generate

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

District	Fiscal Year	Filename	Date	Action
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.txt	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.xlsx	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:05:40 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.txt	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.xlsx	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2014 - 2015	Word-Test.docx	9/2/2015 11:08:56 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	Excel-Test.xlsx	9/2/2015 11:09:51 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	Excel-Test.xlsx	9/2/2015 11:12:37 PM	Download

1 ▾ > >|
Page Size: 10 ▾

Export to Excel

Export to PDF

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

6.5 Create District Report

District Report

District: **A**
Fiscal Year: **B**
C

D0101 ▾
2015 - 2016 ▾
Generate

District name selected: USD 101 - Erie-Galesburg

Export to Excel
Export to PDF

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

User	Filename	Date	Action
Julie Cook	Word-Test.docx	10/8/2015 10:48:42 AM	Upload
Julie Cook	Word-Test.docx	10/8/2015 10:48:57 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 10:52:09 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 10:52:53 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 2:27:47 PM	Delete
1			

Export to Excel

Export to PDF

- Click the export type (Excel or PDF) to save a copy of the report to your computer (“D”).

7 KSDE ADMIN USER ACCESS LEVEL

7.1 Uploading Files

Upload File

File to Upload: A

FY: B

District: C

D

Browse...

2015 - 2016

D0101

Upload

District name selected: USD 101 - Erie-Galesburg

- Navigate to the “Manage Files” page in the application menu.
- Select file to upload by locating the file on your computer (“A”).
 - Currently allowed file extensions are .doc, docx, .pdf, .xlsx, .xlsm, .xls, .accdb, .csv, and .txt.
 - To select more than one file, hold down the CTRL or Shift Key to select more than one file to upload.
- Select the Fiscal Year for the file being uploaded. The current and previous 2 fiscal years will be selectable from the dropdown (“B”).
- Select the district for the file being uploaded (“C”).
- Click the “Upload” button (“D”) once. Your file will be uploaded and you will receive confirmation once it is complete.

7.2 View/Download Files

Filter

District: A Fiscal Year: B

All Districts ▼ All Years ▼

D C

Select	Filename	District	FY	Uploaded By	Date Added	Last Downloaded By	Last Downloaded Date
<input type="checkbox"/>	Word-Test.docx	USD 101 - Erie-Galesburg	2014 - 2015	Julie Cook	12/1/2014 2:08:54 PM	Kevin Mercer	9/2/2015 11:08:56 PM
<input type="checkbox"/>	KIDS Data flow.docx	USD 208 - Wakeeney	2014 - 2015	Julie Cook	12/4/2014 12:06:56 PM	Julie Cook	9/28/2015 3:52:33 PM

Download

Select All

Clear

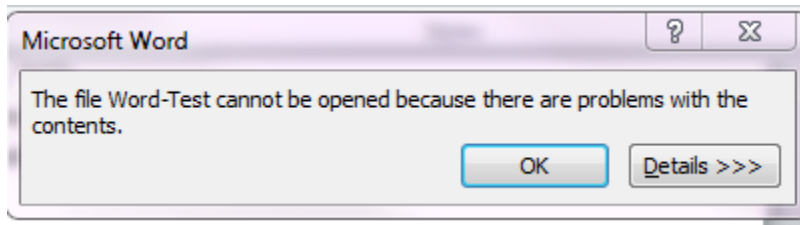
Delete

1. Navigate to the “Manage Files” page in the application menu
2. *Optional* - Select District to filter from the dropdown 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 (“B”). Page will update after making a selection to apply the filter to the results.
4. To download one file, click the “Filename” link for the file you wish to see (“C”). A prompt will appear for you to open or save the file.
5. To download multiple files, select the checkbox under “Select” for the files you wish to download (“D”) or click the Select All button and then click the Download button at the bottom of the page. A prompt will appear for you to open or save the files. The files will be in a zip file.
6. Note: When you save the documents 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.

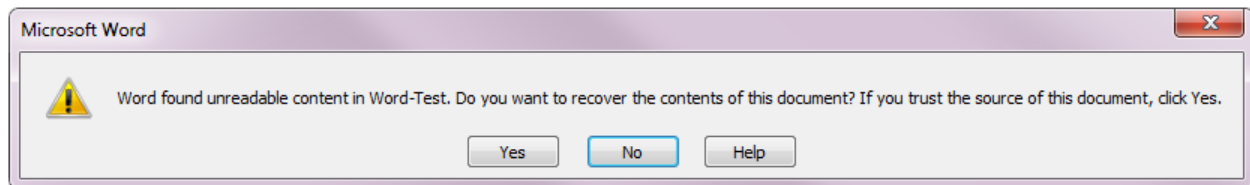


Note: If you are viewing or downloading a Word or Excel document, you may receive some additional messages. Here is what you might see:

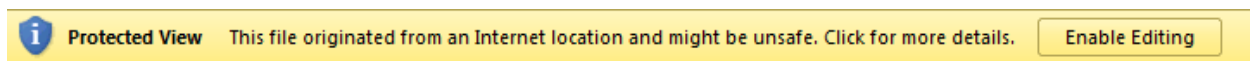
From Microsoft Word:



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

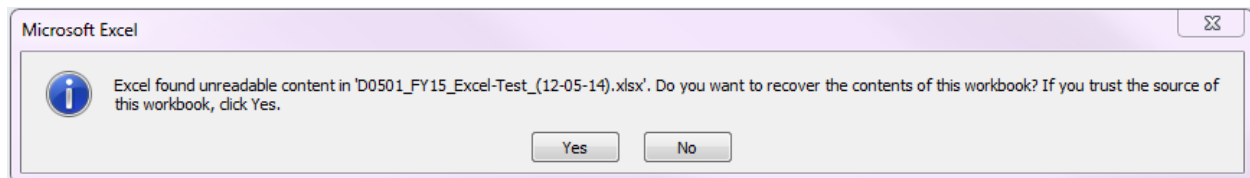


Click Yes, there is no problem with the file. The file will then open in Word in Protected View.

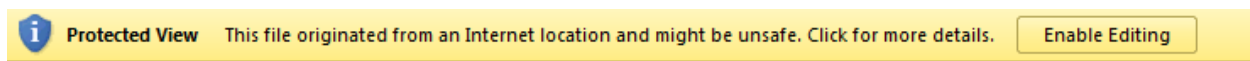


In order to save or modify the document, you will need to click the "Enable Editing" button.

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

Filter

District: A
Fiscal Year: B

All Districts
All Years

D

Select	Filename	District	FY	Uploaded By	Date Added	Last Downloaded By	Last Downloaded Date
<input type="checkbox"/>	Word-Test.docx	USD 101 - Erie-Galesburg	2014 - 2015	Julie Cook	12/1/2014 2:08:54 PM	Kevin Mercer	9/2/2015 11:08:56 PM
<input type="checkbox"/>	KIDS Data flow.docx	USD 208 - Wakeeney	2014 - 2015	Julie Cook	12/4/2014 12:06:56 PM	Julie Cook	9/28/2015 3:52:33 PM

Download
Select All
Clear
Delete

1. Navigate to the “Manage Files” page in the application menu
2. *Optional* - Select District to filter from the dropdown 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 (“B”). Page will update after making a selection to apply the filter to the results.
4. Select the checkbox under “Select” for the files you wish to delete (“C”). Note: you can select more than 1 to delete at once.
5. Click the “Delete” button (“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

User Report

User:
Start Date: B
D

Kevin Mercer
A

Generate

End Date: C

1. Navigate to the “Create Report” page in the application menu
2. Select a user from the dropdown menu (“A”).
3. Select a starting date by either typing it in (MM/DD/YYYY) or selecting it from the calendar popup tool (“B”).
4. Select an ending date by either typing it in (MM/DD/YYYY) or selecting it from the calendar popup tool (“C”).

- Click the “Generate” button (“D”). Data in the report will appear in a table at the bottom of the page:

District	Fiscal Year	Filename	Date	Action
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.txt	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.xlsx	9/2/2015 11:04:28 PM	Upload
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:05:40 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.docx	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.txt	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2015 - 2016	260 sped teacher sum.xlsx	9/2/2015 11:07:35 PM	Delete
USD 101 - Erie-Galesburg	2014 - 2015	Word-Test.docx	9/2/2015 11:08:56 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	Excel-Test.xlsx	9/2/2015 11:09:51 PM	Download
USD 101 - Erie-Galesburg	2015 - 2016	Excel-Test.xlsx	9/2/2015 11:12:37 PM	Download

1 ▾ > >|

Page Size: 10 ▾

Export to Excel

Export to PDF

- Click the export type (Excel or PDF) to save a copy of the report to your computer.

7.5 Create District Report

District Report

District: A

Fiscal Year: B

C

D0101 ▾

2015 - 2016 ▾

Generate

District name selected: USD 101 - Erie-Galesburg

Export to Excel

Export to PDF

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
Julie Cook	Word-Test.docx	10/8/2015 10:48:42 AM	Upload
Julie Cook	Word-Test.docx	10/8/2015 10:48:57 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 10:52:09 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 10:52:53 AM	Download
Julie Cook	Word-Test.docx	10/8/2015 2:27:47 PM	Delete
1			

Export to Excel

Export to PDF

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