Arkansas Secretary of State

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Lobbyist Reporting System Training Guide

Document Version 1.1

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Arkansas Secretary of State

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Revision History

Name	Date	Reason for Change	Version
Sally Smith	7/12/2017	Initial draft	1.0

1 Introduction

1.1 Purpose

This training guide is to serve as an outline for trainers from the Office of the Secretary of State of the State of Arkansas when training end users in the use of the Online Filing System for Lobbyists. It has also been designed to be used by end users as a quick reference to the application.

1.1.1 Document Overview

The training guide starts with a section of giving an overview of system wide concepts – standard controls and how they function, how required and optional data entry fields work, and the types of messages and notifications that are seen.

This is followed by functional descriptions, organized along the lines of a basic workflow.

- Registration from the public site
- Lobbyist workspace
- Filing Reports
- Data Import
- Lobbyist Administration
- Public Site

1.1.2 Audience

The main audiences for this training guide are:

- Trainers who will be training end users on the use of the system.
- Registered lobbyist users of the system.

1.2 System Overview

1.2.1 Common Screen Elements

Information Icon

- These appear in various places throughout the application.
- Move your mouse over the icon (no need to click) to see a small pop-up of text which contains information relevant to the function or screen you are on.

Datagrids and Lists

- In many places, you will see data that is displayed in rows contained within multi-paged, sortable datagrids or lists.

- The grids default to 10 rows per page. At the bottom is a small dropdown where you can choose to change the grid to show 25 or 50 rows per page.
- Rows can be sorted by any column by clicking on the column heading. Click again to toggle the sort between ascending and descending sequence.
- Most rows will have one or more actions that can be taken by the user. These will appear in an action menu on each row, which is shown an ellipse ⋮ icon. Click the icon to view and select the available actions.

Dates

- When clicking into an editable date field, a calendar will pop open for you to select a date. It will default to showing the selection on the current date.
- You may scroll the calendar to get to past or future months. As an alternative, you may also click a specific month/year to get to a specific time frame immediately.
- Clicking a date will select that date, close the calendar, and display the date in the entry field.

Dropdown Lists

- Dropdown lists are used for data entry purposes when there are established standardized choices for the particular data needed, such as expenditure type.
- In some cases, the list includes an "Other" option. If this is selected, a textbox will be shown for you to enter details or a short explanation.

Textboxes

- Textboxes are used for free-form entry of data (examples: names, addresses, city, explanations or descriptions)

Checkboxes

- Often checkboxes will be used to select options.

Action Menus

- In a list, action menus are shown as an ellipse ⋮ which can be clicked to show the list of options.
- Action menus may also show up as button. When clicked, it shows the options in a dropdown list.

1.2.2 Required Fields

Required fields are underlined in red. If the red is not present, the field is optional entry.

Occasionally a field may first be displayed as optional entry (no red underline), but during the data entry process it becomes required (red underline appears). This can occur as a result of other data values or dropdown selections that have been made which now require additional data to be provided.

If required fields do not contain data, dialogs cannot be saved. In most cases, the *Save* or *Update* buttons are disabled until all required data is present. In other cases, error messages will be shown to remind you of missing required data if you attempt to save before all required data is entered.

1.2.3   System Notifications

Toast messages

These provide simple feedback in a small panel at the bottom of the screen. They are visible for a short while, long enough to be read, then they disappear.   There is no need to respond to toast messages. An example of a toast message would be "Your report has been successfully filed".

Pop-ups

When a message needs to be acknowledged, or you need to verify an action before it can continue, a pop-up message will be shown. You will not be able to proceed without clicking *OK* or *Cancel*. For example, if you enter an edit for a contribution and then close the dialog before saving the updates, a pop-up will be shown which says "Closing before saving will discard all progress". If you click *OK*, the dialog is closed as intended. If you click *Cancel*, you are returned to the dialog which remains open.

Emails

The system automatically sends email notifications which include requested information, reminders, or may be triggered by system events. For this reason, it is very important to be sure the system has your up-to-date email address. For information on updating your email address, see Editing Lobbyist Contact Information.

Notifications include:

- Confirmation of registration submission
- Registration accepted
- Registration conditionally accepted
- Registration rejected
- User login credential information
- Signature card reprints
- Confirmation of submitted filing
- Upcoming report due reminder
- Notification of unfiled report

2   Registration

Lobbyists may register as a lobbyist firm with one or more associated lobbyists, or as an individual lobbyist. In order to use the Financial Disclosure system to input data and file reports, each lobbyist firm or individual lobbyist registrant must register in the system and be assigned login credentials.

2.1 Begin the Registration Process

To begin the registration process, navigate to the Financial Disclosure site.

- Select the *Register* link in the page header.
- You will see a short list of registration types.
- Select *Lobbyist Reporting*.
- A data entry screen for registering lobbyists will be shown.

2.2   Enter Registration Information

2.2.1   Lobbyist or Lobbyists Firm Information

This section is used to enter your name, address, and contact information. The first thing that is entered is to select the Type of Registration – Individual Lobbyist or Lobbyist Firm. The screen layout will change once this has been selected, based on the information required to be entered for each type.

Individual Lobbyist Selected

Lobbyist Firm Selected

2.2.2   Contact Person for Firm

This section is used only for lobbyist firms.

If you are registering as a lobbyist firm, it is required that you provide a contact person for the firms. Click Add Contact Person to display the dialog for entering your contact person's information.

- Enter the contact person's name and email address.
- If the contact person for the firm is also an associate lobbyist, be sure to check the box indicating this.
- Click the *Save* button to save the information and close the panel.

2.2.3   Entities to be Lobbied

You are required to indicate which ones of the listed government entitles you will be lobbying. You may select more than one as applicable.

Entities to be Lobbied ❓

☐ Members of the General Assembly

☐ Public Servants of State Government

☐ Public Servants of County Government

☐ Public Servants of Municipal Government

☐ Public Servants of Other Government Body

If you select Public Servants of County Government, Municipal Government or Other Government Body, a panel will be shown for you to provide name of the county, municipality, or other government body.

Entities to be Lobbied ❓

☐ Members of the General Assembly

☐ Public Servants of State Government

☐ Public Servants of County Government

☑ Public Servants of Municipal Government

Name of Municipality   ADD

☐ Public Servants of Other Government Body

- If you have selected Public Servants of County Governments, you will see a dropdown list of counties and an *Add* button. Select the county and click *Add*. The county will be added to a list on the screen. Continue in this manner until all counties needed are entered.
- If you have selected Public Servants of Municipal Government or Other Government Body, you will see a textbox and an *Add* button. Enter the municipality or other government body, and click *Add*. The name will be added to a list on the screen. Continue in this manner until all municipalities or other government bodies needed are entered.
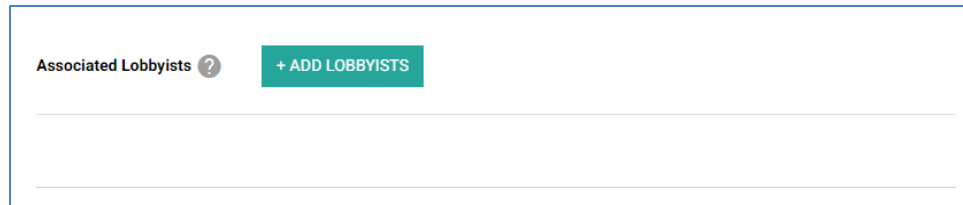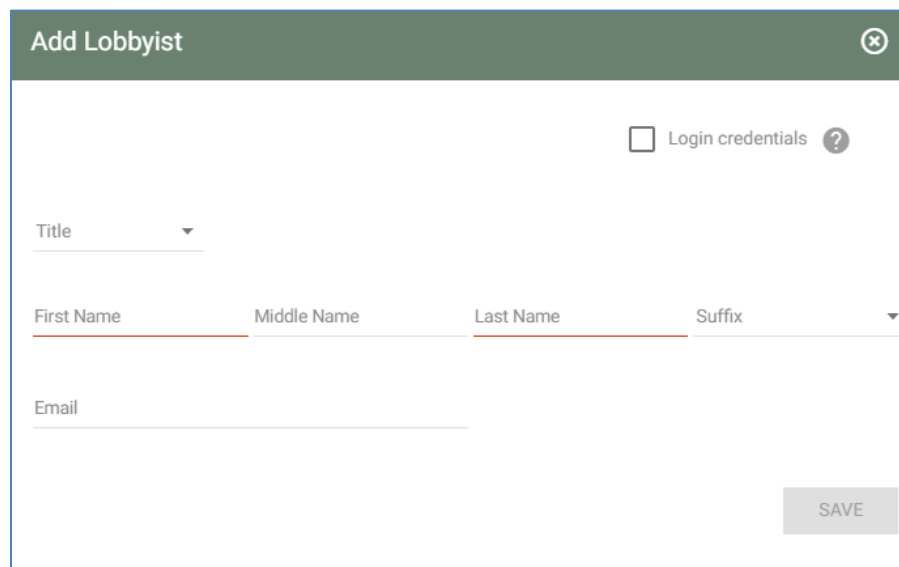
2.2.4 Associated Lobbyists

This section is used only for lobbyist firms.

If you are registering as a lobbyist firm, you will see a section for entering all of your associated lobbyists.

Click the *Add Lobbyist* button in order to add any person who is authorized to lobby for the firm. When you click on the *Add Lobbyist* button, the Add Associated Lobbyist dialog will be displayed.

- Enter the lobbyist name and address.

  Note if the contact person is also an associated lobbyist - you should indicate that by checking the box provided for that purpose with the contact person's information. Do not re-add the person as an associated lobbyist in this section.

- Login Credentials:
  - Any of the lobbyists may be given login credentials by clicking the *Login Credentials* box.
  - It is required that the email address be provided for any individual that is to receive login credentials.
  - These individuals will be assigned login credentials when the registration is accepted by the administrators.

- Once all required information is entered, the *Save* button is enabled and you may save the officer information.
- The dialog is closed and the information is added to the Associated Lobbyists list.
- Continue adding lobbyists in this manner until all associated lobbyists are added.

2.2.5   Client Information

This section is where you enter your client information.

Click the *Add Client* button. The Add Client dialog is shown for you to add a new client to the list.

- Begin by typing in the client name.
- All previously entered clients (across all lobbyists and lobbyist firms) are searched for similar names. These will automatically be displayed in a list. The matching names are further filtered as you type more of the name.

- You have the option to select one of the previously entered clients, which will automatically populate the client address and phone. Click *Save* to add the client to the list and close the dialog.
- You will also see an *Add New Client* link. If your client is not in the list of previously entered clients, click the *Add New Client* link. The Add New Client panel is displayed.

- Enter the client's name, address, city, state, zip, and phone.
- Click *Save* to add the client to the list and close the dialog.
- Continue adding all clients in this manner.

2.3   Submit your Registration

When you have completed all required entry for your registration, the *Save* button will be enabled. Ensure all entries are correct, and click the *Save* button. You will see a screen which confirms your submission and contains instructions for the final step of the registration process.

2.4   Print and Return Signature Card

The confirmation screen you see after saving your registration information will contain general instructions about signature card requirements, and will have a link to print a signature card which will be pre-populated with the names of all individuals that need to sign it.

It is required that the original notarized signature card be submitted before you may log into the system to electronically file reports. Using the "*Click here to print a signature card*" link provided on the screen, print the signature card so you may complete it, have it signed by all required individuals, have it notarized, and return it to the Secretary of State's Office.

You will be unable to complete the submission of the registration until you click the link to print the signature card. Once you have done that, click the *Finished* button. You will receive an email confirming that the registration has been submitted.

If you encounter printer problems, or for other reasons are unable to print the signature card, contact the Secretary of State's staff to have one sent to you.

2.5   When your Registration is Accepted

When the signature card is received, the Secretary of State's staff will review your registration. Once they approve it, your lobbyist account will be made active in the system, and you will receive a confirmation email.

2.5.1   Receiving Login Credentials

Login credentials will automatically be assigned to the following:

- For an individual lobbyist registrant:
  - The lobbyist
- For a lobbyist firm:
  - The contact person
  - Any associated lobbyist listed on registration with the *Login Credentials* option checked.

When the registration is accepted by the administrator, emails are sent to all of these individuals with instructions for logging into the application.

3   Your Lobbyist Workspace

3.1   Signing In

- To begin the sign in process, navigate to the Financial Disclosure public site.
- Select the *Sign In* link in the page header.

- The Registered User Login dialog will be shown, with space for you to enter your username and password, as well as links which can be used if you have forgotten your username or your password.
- Enter your username and password and click *Sign In*.
- If you are associated with more than one lobbyist registration, you will see a list of these and will be required to indicate which one you are logging into.
- You will then be directed to the Home page for your lobbyist workspace.

3.2   Workspace Overview

3.2.1   Home Page

Upon logging into the system, you will be on the home page for your workspace. When the home page is first opened, the center portion of the screen shows the Immediate To Do list, the Upcoming Reports list, and the Recently Filed Reports list.

As you work, the center portion of the screen may be overlaid with various different functions as you select menu options. Clicking the *Home* link returns the screen to its initial format with the three lists.

3.2.2   Immediate To Do

The Immediate To Do list shows you items that you need to be aware of or that need to be completed. For example, when a report is due, an item would show up to remind you to file the report. Or an item would show up to remind you to file an amendment for a previously report because you have added to or updated information in the report.   On each of these reminders, there is link to preview the report without submitting it, and also a link to directly open the File Report dialog where the selected report can be submitted.

3.2.3   Upcoming Reports

The Upcoming Reports List shows you which reports are going to be coming due.

3.2.4   Recently Filed Reports

The Recently Filed Reports list shows you all reports that were most recently filed. On each, there is a *View* link which will show you a PDF of the filed report.

3.2.5   Workspace Action Menu

The Workspace Action Menu is on the left side of the screen. Each item in the menu, when clicked, will open up in the center part of the screen. Clicking the *Home* link returns the screen to its default view with the Immediate To Do list, the Upcoming Reports list, and the Recently Filed Reports list showing.

Clicking the ☰ icon in the header above the panel will toggle the panel between being shown or hidden.

4   Filing Reports

4.1   Reports Screen

The reports screen is accessed from the *Reports* link on the Workspace Action Menu.

4.1.1   Unfiled, Filed, and Pending Reports Lists

Reports

| UNFILED | FILED | PENDING | | | | 2017 Filing Cycle ▼ |

Report Name	Due Date	Filed Date	Start of Peroid	End of Peroid	Report Status	Report Type	
Lobbyist Activity Report - September	10/07/2017		09/01/2017	09/30/2017	Unfiled	Lobbyist Activity Report	⋮
Lobbyist Activity Report - October	11/07/2017		10/01/2017	10/31/2017	Unfiled	Lobbyist Activity Report	⋮
Lobbyist Activity Report - Fourth Quarter	01/15/2018		11/01/2017	12/31/2017	Unfiled	Lobbyist Activity Report	⋮

- On the Reports screen, click the *Unfiled, Filed, or Pending* tabs to see lists of reports in those three categories.
    - **Unfiled** – This list includes reports that have not been filed yet. If the report has been started and saved, but not yet submitted, it still shows in the Unfiled list.
    - **Filed** – Once a report is filed, it is shown in the Filed list, and is removed from the Unfiled list. If the report has had an amendment, it also is shown. All versions of a report (original filing and amendments) are shown in the expandable/collapsible panel under the main report row. This panel is opened and closed by clicking the caret icon next to the report name.
    - **Pending** – This shows any report that has been started and saved, but not yet submitted. This could be a new report you are working on, or it could be an amendment to a previously filed report.
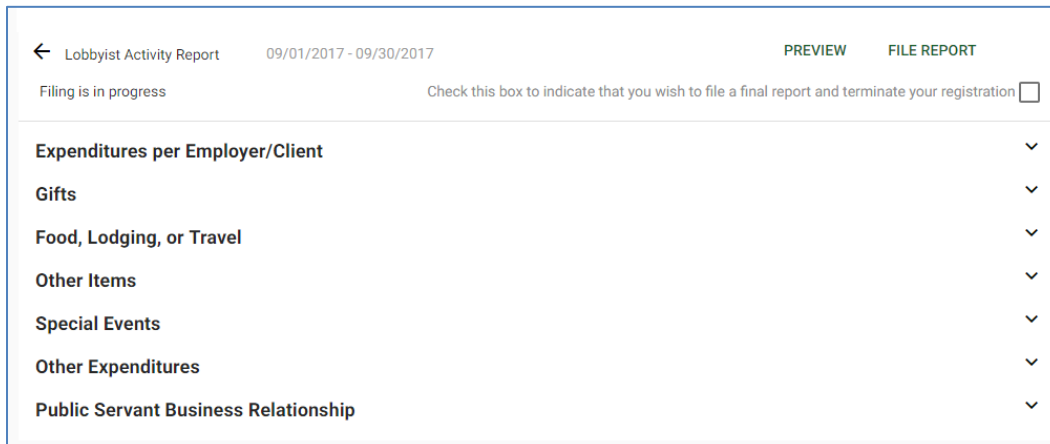
- In each list, the reports have an Action Menu which is obtained by clicking the ⋮ icon. The available options depend on the unfiled or filed status of the report.
  - Options for unfiled reports:
    - *Preview* – Clicking this link displays a PDF of the report as it would look if filed with the report information that has been added to the report so far. Note that this action is does not file the report.
    - *File* - This link opens the File Report dialog where you will enter your report information and file the report.
  - Options for filed reports:
    - *View* - displays a PDF of the filed report. For amended report, each version can be viewed through its own *View* link.
    - *Amend* – This opens the report filing screen. Your report information will show up as it was when you last filed the report. Make modifications as needed and file the amendment.

4.2   File Report Dialog

When the report dialog is first opened, you will see a header and a list of categories. These category names are actually collapsed panels where report information will be entered.

4.2.1   Header Area and Action Links

The header area includes the name of the report, the reporting data range, an arrow to return to the Reports screen, and these action links:

- *Preview* will display a draft version of the PDF of the report as it would look if you filed it with all of the date entered so far. This action does not file the report.
- *File Report* is used when you are ready to file the report. Once this is done, the filing becomes available on the public site to be viewed. After this, any changes needed on the report will have to be filed on an amendment.

The header area also includes a checkbox to indicate that you are terminating your registration and the report you are filing is your final report.

4.2.2   Category panels

The category panels can be expanded or collapsed by clicking the caret icon shown to the right of each heading.

When expanded, the Expenditures per Employer/Client Category, the Gifts Category, the Food, Lodging, or Travel Category, the Other Items category, and the Special Events Category each will show a brief description of the section, and an *Add* button.

The Other Expenditures category and the Public Servant Business Relationship category will have a Yes/No question that must be checked "Yes" before the *Add* button is shown.

4.2.3   Adding Expenditures to the Report

To add expenditures to the category, click the *Add* button. A dialog to enter the expenditure will be opened.

- In this example, you would proceed to enter the information for one gift expenditure.
- When all required data is provided, the *Create* button will be enabled for you to save the expenditure on the report.
- When the item is saved, the Add dialog is closed, and you will see that the expenditure has been added to a list in the category on the report screen.
- Continue adding the rest of your expenditures in the same manner.

4.2.4   Updating or Removing Expenditures from the Report

Items added to your report can be updated or removed if necessary. Any item can be updated by clicking *Update* in the action menu, which will open an Edit dialog, pre-populated with the information you have entered. An item can be removed from the report by clicking *Remove* in the action menu.

4.2.5 Saving the Report Information to be Filed Later

As you add expenditures, the information is automatically saved for you. You may leave the Filing Report dialog whenever necessary, and return later to resume completing the report.

Reports that have been started but not yet filed are shown in the Pending list. A report will not be visible on the public site if it has been saved, but not yet filed.

4.2.6 Filing your Report

When you are finished entering all information that needs to be included on the report, you may file it by clicking *File Report* in the screen header area.

After you file your report, you will receive an email confirming that the report was successfully filed. The report will now be available for view on the public site.

4.3 Viewing Filed Reports

- On the Reports screen, click the *Filed* tab.
- A list of all your filed reports is displayed, filtered by the selected filing cycle shown in the dropdown.
- To view reports from a different cycle, select the new cycle in the dropdown.
- If there have been amendments, the report will have an expandable/collapsible list of amendments below it.
- All reports and amendments will have an action menu with a *View* link which can be used to display a PDF of the report.
- The *Amend* link is used to amend the report.

4.3.1   Submitting an Amendment for a Filed Report

If you have filed a report, and later you wish to add, update, or remove information on the report, you may do this by locating the report in the Filed list. Click the *Amend* link in the action menu. The report screen will be opened. , pre-populated with the information from the filed report.

- The report screen will be pre-populated with the information from the filed report.
- There will be a Previous Versions section, where you will see the filed dates of all prior versions of the report, and a link to view each one.
- Enter your changes to the report, and click the *Amend Report* link (which will be shown in place of the File Report link). This will add the amendment to the Filed Reports list.

5   Lobbyist Administration

The Administration screen is accessed from the *Administration* link on the Workspace Action Menu.

A variety of administrative functions and general information about the lobbyist or lobbyist firm is displayed.

USER SETTINGS   TERMINATE REGISTRATION

CLIENTS/EMPLOYERS   DOCUMENT IMAGES   2017 Filing Cycle ▼

Client/Employer	Type of Business	Address
Area Agency on Aging of Northwest Arkansas	Nonprofit advocate for elderly population	P. O. Box 1795, Harrison, AR 72602 (555) 555-5555

Event Log

User Login Rollins, Timothy logged in.	trollins@test.com	08.03.2017 2:42:15 PM
Registration Accepted Administrator, System logged in.	admin@mail.com	08.02.2017 11:22:39 AM

📄 **Lobbyist Firm Details** ✏️

Firm
Area Agency on Aging of Northwest Arkansas

Status
Active

Address
1510 Rock Springs Road, Harrison, AR 72602

ID
224916

Entities to be Lobbied
Members of the General Assembly
Public Servants of State Government

VIEW REGISTRATION

📄 **Lobbyist/Contact:**

James Collins Lobbyist jcollins@test.com	Active	✏️
Ray Jones Lobbyist rjones@test.com	Active	✏️
Timothy Rollins Contact trollins@test.com	Active	✏️
Bill Wildman Lobbyist bwildman@test.com	Active	✏️

5.1   Clients/Employers Tab

The Clients/Employers tab shows that name, address, and type of business for each client you have provided on your registration.

5.2   Document Images Tab

The Document Images tab shows a list of any documents that have been uploaded to your account by the administrators, including filings that were submitted on paper and scanned, and auto-imaged generated letters (for example - the registration confirmation letter).

The documents in the list can be viewed by clicking the name of the document.

5.3   Event Log

The Event log is a list of events that have occurred in your account.

Examples are:

- User Logged In
- Registration Accepted
- Registration Conditionally Accepted
- Registration Conditional Acceptance changed to Accepted
- Registration Amended
- Registration Corrected
- Report Checked-in – includes the name of report
- Report Filed – includes the name of report
- Report Amended – includes the name of report
- Termination Report Filed
- Status Changed – includes the new status
- Image uploaded – includes the name of image

5.4   User Login Maintenance

You can change your password and security questions by clicking *User Settings* and selecting one of the options listed.
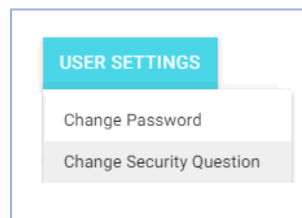
5.4.1   Changing Password

- To change your password, start by entering the current password.
- Enter the new password.
- Verify the new password by entering it a second time.
- If the password is valid, the *Save* button will be enabled. Click *Save* to save the new password.

5.4.2   Changing Security Question(s)

- To change your questions or answers, select the question, enter the answer, and verify by entering the answer again.
- Click *Save Changes* to save the new question/answer.
- Click the arrows to toggle to any other questions/answers that have been set up.

5.5   Maintaining your Registration

Basic lobbyist or lobbyist firm details from the registration are shown in the top part of the right side panel. Clicking the [icon] icon in the header above the panel will toggle the entire panel between being shown or hidden.

This section shows general information about the lobbyist or lobbyist firm - name, address, status, and a list of the entities to be lobbied.

The *View Registration* link will display the registration form. If the registration has been amended, instead you will see a *Past Registrations* link. This will list the registration date and any amendment dates. Click on any of them to view that version of the registration form.

5.5.1   Amending Registration

To amend your registration, click the [icon] icon at the top of the Lobbyist or Lobbyist Firm Details section. The Amend Registration screen will be displayed. This is just like the Registration screen, with the data pre-populated. Make your changes and click *Update*.

If you are a lobbyist firm and you are amending your registration in order to add a new lobbyist, you will need to print a new signature card, have it signed by all individuals listed, have it notarized, and return it. This is the same process you would have followed for your initial registration. The confirmation screen will indicate when a new signature card is needed, and will show a link to print the signature card.

5.5.2   Renewing Registration

The *Renew* button is visible if there has been an active renewal schedule set up by the system administrators. Clicking the button opens your Registration screen, which will be presented pre-populated for you to update as needed, then submit.

5.5.3   Reactivating Registration

The *Reactivate* button is only visible for terminated lobbyists. When clicked, it sets your status in the system back to Active for the current or most recently assigned filing cycle.

5.6   Lobbyists and Contact Person Information

This section is only visible for lobbyist firms.

The name, email, role and status of each lobbyist and contact person which have been entered on your registration are listed in this section in the bottom part of the right side panel. Clicking the [icon] icon in the header above the panel will toggle the entire panel between being shown or hidden.

5.6.1   Editing an Individual's Contact Information

You may edit an individual's phone number or email address without amending the registration. Note that any other changes to the associated lobbyists or contact person information will need to be made through a registration amendment.

Click the [icon] icon next to the lobbyist or contact person to open the Edit dialog, update the phone number and email as needed, and click *Save*. The information will be updated and the dialog will be closed.

5.7   Terminating your Registration

5.7.1   Terminate through filing a report

You may terminate your registration as part of the report filing process. A box is available for you to indicate you are terminating.   When the report is filed, your registration will be terminated and the Lobbyist Termination Form will be generate for you and placed in your Filed Reports list.

5.7.2   Terminate outside of the report filing process

You may also choose to terminate outside of the process of filing a report, if you have no unfiled transactions to report. On the administration screen, a *Terminate* button is visible for active lobbyists and lobbyist firms. Click the *Terminate* button to open the Termination dialog.

- You'll see information explaining that if you have any unfiled activity to report, you should file it before terminating. The *Go To Reports Screen* link will transfer you to your Reports screen.
- If you have nothing to report, check the box to confirm this. This will enable the *Submit Termination* button.
- Click the *Submit Termination* button.

5.7.3   What happens when I terminate?

After you have submitted a termination by either of the above methods, the following occurs:

- Your lobbyist or lobbyist firm status will now be set to Terminated.
- Any future reports (those that have a period begin date in the future) that might have been on your schedule will be removed. They will not need to be filed.
- A Lobbyist Termination Form will automatically be generated and placed in your filing history where it can be viewed.

6   Public Site

6.1   Overview

The public site is accessible to anyone; no login credentials are needed. On this site, the public user can search for and view information about all lobbyists, lobbyist firms, and clients, and view all filed reports.

6.1.1   Getting there and back

If you have login credentials for the system, you may access the public site and return to your workspace, and go back and forth, without continually logging in and out.

- If you are logged in, click *Public Site* in the Workspace Action Menu.
- You will be transferred to the public site.
- In the public site, if you have gone there while being logged into your workspace, you will see a *Home* link in the Public Site Action Menu. Click this link to be returned to your workspace.
- As long as you stay logged in, you may use these two links to go back and forth.
- Once you log out, you cannot get back to your workspace without logging in again.

6.1.2   Explores and Searches

The public site provides two basic ways to find and obtain information.

Explores are a way to look at general lists of information such as lobbyists or clients. By using the available filters, the contents of the lists can be made more specific. Data columns can be added or removed from the lists.

Searches are intended to zero in on specific entities, more quickly than you may be able to get there using the Explores. For example, you may be looking for a specific client. It is faster to get to what you need by doing a specific search using the client's name.

Searches for lobbyists or clients can be done from the search bar on the heading.

Viewing Lobbyist or Client Details can be accessed by selecting a specific entity in either the Explores or the Searches.

For lobbyists, you can view lobbyist registration information, financial summary, all filed reports, all uploaded documents, a list of clients, and for a lobbyist firms, a list of all lobbyists.

For clients, a list of lobbyists that have included this client on their registration is shown, as well as a financial summary for all client information across all lobbyists who are associated to them.