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Ethics Disclosure Training Guide

Document Version 1.1

Initial Draft:	July 21, 2017
Revised:	June 15, 2018
Created by:	PCC, Inc.



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Revision History

Name	Date	Reason for Change	Version
Sally Smith	7/21/2017	Initial draft	1.0



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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 Ethics Disclosures. 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 an introductory section providing 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
- Ethics Disclosure workspace
- Filing Reports
- Filer 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 users of the Ethics Disclosure 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.



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- 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. Examples include contribution type, election type, or occupation.
- 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.



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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 [Amending Your Registration](#).

Notifications include:

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



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2 Registration

In order to use the Ethics Disclosure system to input data and file reports, each filer 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 *Ethics Disclosure*.
- A data entry screen for registering in the system will be shown.

2.2 Enter Registration Information

2.2.1 Filer Information

This section is used to enter your name, address, and contact information.

Filer Information

Title

First Name Middle Name Last Name Suffix

Address Line 1 Address Line 2

City State Zip

Phone Email



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2.2.2 Filing Requirements

This section is where you indicate which forms you will be filing. Check one or more boxes as appropriate. It is important to accurately select your specific filing requirement(s) in order to have access to the correct forms.

Filing Requirements

Statement of Financial Interest

Disclosure by Member of the General Assembly

Extra Income Statement of State Employees

Disclosure by Member of a County Board of Election Commissioners

For the **Disclosure by Member of the General Assembly** and the **Disclosure by Member of a County Board of Election Commissioners**, there is no supplemental information to provide.

For the **Statement of Financial Interest**, you will need to provide one or more reasons for filing. If you have multiple reasons for filing, they each need to be entered using this process.

When you check the box, you will see an *Add Reason for Filing* button. To begin, click the button to display the Add Reason for Filing dialog.

Add Reason for Filing ✕

Reason For Filing

Candidate ▼

Office

Governor ▼

SAVE

- The Reason for Filing dropdown contains various offices/positions. Select the position you hold.
- Based on your selection, a textbox or dropdown may be shown for you to provide further information, such as the office you hold or are running for, or the name of a board, commission, or school district.



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- Once the required information is entered, the *Save* button is enabled and you may save the reason for filing. It will be added to the list on the screen.
- If you have additional reasons for filing to enter, continue adding them in this manner.

For the **Extra Income Statement of State Employees**, you will need to provide the name and address of the agency where you are employed. When you check the box, the Agency panel will be shown.

Extra Income Statement of State Employees

Agency

- Start typing the agency name. As you type, a scrollable list of agencies that have already been entered, in which the name contains the text you are typing, will be shown for you to select.

Abstractor's Board, Arkansas P.O. Box 166006,,Little Rock,AR,72216

Aeronautics, Arkansas Department of 1 Airport Drive, 3rd Floor,,Little Rock,AR,72202

Alcoholic Beverage Control Board 1515 W. 7th Street, Suite 503,,Little

Agency

A

- If your agency is in the list, select it by clicking the name. Once the agency is selected, the dialog is closed and the name of your agency is shown on the screen.
- If your agency is not in the list, scroll to the end of the list and click the *Add New Agency* option shown there. This will open the Add New Agency dialog.



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A screenshot of a web form titled "Add New Agency". The form has a light blue background and a white border. It contains several input fields: "Agency Name", "Address Line 1", "Address Line 2", "City", "State" (with "AR" pre-filled), and "Zip". There are two buttons at the bottom right: "CANCEL" and "SAVE".

Agency Name	Address Line 1	Address Line 2
City	State AR	Zip

- Enter the agency name and address.
- When all required information is provided, the *Save* button is enabled for you to save the agency information.
- Once the agency is saved, the dialog is closed and the name of your agency is shown on the screen.

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 your information.

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 sign and date it, 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 emailed to you.



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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 filer 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 you when the registration is accepted. You will receive an email with instructions for logging into the application.



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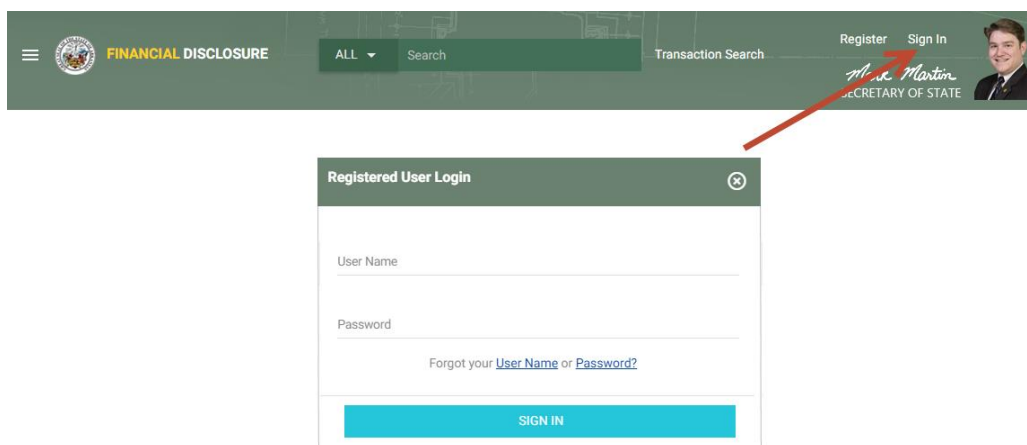
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3 Your Ethics Disclosure Workspace

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*.
- You will then be directed to the Home page for your Ethics Disclosure 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.

If you transfer to another function from the Workspace Action Menu, the center portion of the screen will be overlaid with different functions as you select menu options. Clicking the *Home* link returns the screen to its initial format with the three lists.



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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. 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.



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

3.2.6 Filer Details panel

Along the right side of the screen is a small panel showing your name, address, and phone. For more information about this panel, see [Filer Details](#) in the Filer Administration section.



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4 Filing Reports

4.1 Forms

This system has been configured to allow for the electronic filing of a variety of Ethics Disclosure forms.

- Statement of Financial Interest
- Disclosure by Member of the General Assembly
- Disclosure by Member of a County Board of Election Commissioners
- Extra Income Statement of State Employees

The Reasons for Filings section in your registration will determine which forms are assigned to you for filing.

4.2 Reports Screen

The reports screen is displayed after clicking the from the *Reports* link on the Workspace Action Menu.

Report Name	Due Date	Filing Year	Report Status	Form
Statement of Financial Interest Appointment	01/31/2017	2016	Pending	Statement of Financial Interest Report

1 Result



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Reports

UNFILED **FILED** PENDING

Report Name	Filed Date	Filing Year	Due Date	Report Status	Form
^ Statement of Financial Interest Appointment	07/19/2017	2016	01/31/2017	Amended	Statement of Financial Interest Report
	07/19/2017	2016	01/31/2017	Filed	Statement of Financial Interest Report

1 Result

4.2.1 Unfiled, Filed, and Pending Reports Lists

- 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. It contains one or more options, depending on the status of the report.
 - Options for unfiled reports that have not yet been started:
 - *File* - This link opens the [File Report](#) dialog where you will enter your report information and file the report.
 - Options for unfiled reports that have been started and saved, but not yet submitted:
 - *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.



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- *Resume* – This link is used to continue working on your report. It will open the File Report dialog. Your report information will show up as it was when you last saved the report, and you may continue entering your report information.
- *Discard* -
 - If this is a report that has never been filed, the *Discard* action removes the pending report and all the entered data. It will be as if nothing had been entered. The report is still shown in the Unfiled list, but will not have any associated report information.
 - If this is an amendment to a filed report, the *Discard* action removes the pending report and all the data entered since the report was last filed. The last filed version of the report remains in the Filed list.
- Options for filed reports:
 - *View* - displays a PDF of the filed report. For amended report, each version can be viewed.
 - *Refile* – This opens the report filing screen. Your report information will show up as it was when you last filed the report. You may make modifications as needed, and, like the original filing process, you can either save the amendment as pending in order to complete it later, or you can file it.

4.3 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 different categories of required report information will be entered. The entry screens for all forms follow the same layout.

As an example, the Statement of Financial Interest report screen will look like this:



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← 2016 Statement of Financial Interest Appointment SAVE PREVIEW FILE REPORT

Due in 55 days

- Filer Information
- Filing Information
- Names under which you and/or your spouse do business
- Source of Income
- Business or Holdings
- Office or Directorship
- Creditors
- Past Due Amounts Owed to Government
- Guarantor or Co-Maker
- Gifts
- Awards
- Nongovernmental Sources of Payment
- Direct Regulation of Business
- Sales to Governmental Body
- Acknowledgements Panel

4.3.1 Header Area and Action Links

The header area includes the name of the report, the number of days until the report is due, an arrow to return to the Reports screen, and these action links:

- *Save* will save the data you have entered so far, but does not file the report. This is for your convenience so you have the ability to stop and resume at a later time without losing anything you have entered. The report will not be visible on the public site if it has been saved, but not yet filed.
- *Preview* will display a draft version of the PDF of the report as it would look if you filed it with all of the data 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.

4.3.2 Category panels

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

4.3.3 Sequence of Data Entry

It is a good practice to enter the information in the order it is listed. This is because some of the data in an early section may be needed for a later section. For example:

- *Names under which you and/or your Spouse do Business.*



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These names are used to populate dropdown lists for the data entry in other sections which follow, such the *Name under which Income was Received* in the *Sources of Income* section. If this dropdown is empty, it is probably because you have not entered any names in the *Names under which you and/or your Spouse do Business*.

4.3.4 Entering the Report Information

- Some categories are required to have data entered, such as *Filer Information*. This data is not optional. When you expand the category, you see fields for all of the information that should be entered. In the case of filer information, it will be pre-populated where possible from your registration.

Filer Information ^

Title			
First Name	Middle Name	Last Name	Suffix
George	A	Lincoln	
Address Line 1	Address Line 2		
120 Miles Street			
City	State	Zip Code	
Springdale	AR	77747	
Phone	Email		
(777) 333-5555	GL@test.tst		
Spouse's Name			
First Name	Middle Name	Last Name	Suffix

- In other sections, you will have the option to add information if it is applicable to your report, or you may indicate that you have nothing to report in that section by checking the *None* box provided for that. You must do one or the other.

The *Business or Holdings* category is an example:

Business or Holdings ^

[ADD DISCLOSURE](#) None

- If you have no businesses or holdings to report, check the *None* box.
- To add a Business or Holding, click the *Add Disclosure* button. A dialog to enter the business or holding will be opened.



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- In this example, you would proceed to enter the information for one business or holding.
- When all required data is provided, the *Create* button will be enabled for you to save the information to the report.
- When the item is saved, the Add dialog is closed, and you will see the business or holding has been added to a list in the Business or Holdings category on the report screen.
- You may continue adding more businesses or holdings in the same manner, until all are entered and saved.

4.3.5 Updating or Removing Report Information

Items added to your report can be updated or removed if necessary.

Name of Corporation, Firm, or Enterprise	Address	Value	Name under which investment held
Franklin Consulting	1000 Georgia St, Springdale, AR, 7774	More than \$12,500	Benjamin A Franklin

- 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.



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4.3.6 Acknowledgements

This section contains one or more acknowledgments that must be confirmed before you can file the report. Whether there is one acknowledgment or multiple, it is required that you check each box to confirm your acknowledgment and acceptance of what is stated there.

For example:

Acknowledgements Panel ^

I certify under penalty of false swearing that the above information is true and correct.

Note that each form may have different types of acknowledgements.

4.3.7 Filing your Report

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

If you have not completed all required entry, the *File Report* link will be disabled. In this case, when you hover the mouse pointer over the *File Report* link, you will see a list of what is missing.

Please enter/select

- You have not entered any disclosure into Source and Amount of Income in excess of \$500.00. If you have no disclosures of this type, you must check 'None'.
- All the Acknowledgements.

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.

4.3.8 Amending your Report

If a report needs to be amended:

- Locate the report in the Filed list on the Reports screen.
- Click the *Refile* link in the action menu.
- The File Report dialog will be opened with all of the previously filed information pre-populated.
- Make the necessary changes. As with a new filing, an amendment can be saved to be completed and filed later.



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- When you are ready to refile the amended report, click the File Report link at the top of the screen.

4.3.9 When it is time to file the next year's report

When the next year's report is to be filed, you will not initially see it on your Unfiled Reports list. You first need to update your registration, being sure to make any needed updates to your Filing Requirements.

- On the Filer Administration screen, the *Begin Filing for [Year]* button is visible to filers only when there is an active registration schedule for the next filing cycle.
- Clicking the button opens your Registration screen, which will be presented to you pre-populated with your current information.
- Modify any information as needed.
- Click *Update*.
- You will now be able to proceed to the Reports screen and file the next report.



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5 Filer Administration

The Administration page has a variety of administrative functions and general information about the filer.

USER SETTINGS
BEGIN FILING FOR 2017

📄 **Filer Details** ✎

DOCUMENT IMAGES
2017 ▾

Document Name	Document Type	Date Received	Document Privacy
Filer Registration Acceptance Confirmation	Auto-Imaged Correspondence	07/10/2017	Public

1 results

Event Log

Report Filed - Statement of Financial Interest	ray@test.tst	07.18.2017 5:31:25 PM
User Logged In - SFI <small>Young, Ray logged in</small>	ray@test.tst	07.18.2017 5:02:49 PM
User Logged In - SFI <small>Young, Ray logged in</small>	ray@test.tst	07.11.2017 2:20:01 PM
Registration Accepted	admin@test.tst	07.10.2017 3:11:23 PM

See More

5.1 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.

5.2 Event Log

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

Examples are:

- User Logged In
- Registration Accepted



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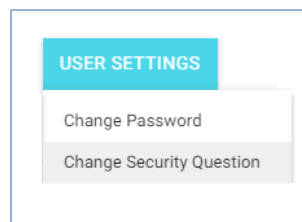
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- Registration Amended
- Registration Corrected
- Report Checked-in – includes name of report
- Report Filed – includes name of report
- Report Amended – includes name of report
- Image uploaded – includes name of image

5.3 User Login Maintenance

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



5.3.1 Changing Password

A screenshot of a "Change Password" form. The form has a blue header with the text "Change Password" and a close button (an 'x' in a circle). Below the header are three input fields: "Previous Password (Re-Enter)", "New Password", and "Verify New Password". At the bottom of the form is a "SAVE" button.

- 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.



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5.3.2 Changing Security Question(s)


A screenshot of a mobile application interface titled "Change Security Questions". It features a blue header with a close button (X). Below the header, there are three input fields: "Security Question" with the value "IN WHAT CITY WERE YOU BORN?", "Answer" with the value "Chicago", and "Verify Answer" with the value "Chicago". At the bottom, there is a blue "SAVE CHANGES" button flanked by left and right navigation arrows.

- 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.

5.3.3 Filer Details

Basic filer information (includes name, address, phone) is shown in the top part of the right side panel. Clicking the  icon in the header above the panel will toggle the panel between being shown or hidden.

5.3.4 Amending Your Registration

To amend your registration, click the  icon at the top of the Filer 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*.



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6 Public Site for Ethics Disclosure Reports

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 ethics disclosure filers and their reports.

6.1.1 Getting there and back

If you have login credentials for the system, you may go into 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 can access the public site anytime, but you cannot get back to your workspace without logging in again.

6.2 Available Public Functionality

6.2.1 Explore Ethics Disclosure Filers

Explores are a way to look at general lists of information, and by using the available filters (such as filing year, report type, office/district, agency, municipality) the group of filers shown in the list can be made more specific. Data columns can be added or removed from the lists. Clicking the name of an individual filer opens a detail screen for that filer, which includes general filer information and a list of all Ethics Disclosure reports submitted by that filer. A PDF of each report can be viewed.

6.2.2 Ethics Reports

All Ethics Disclosure reports are listed here. Like the *Explore Ethics Disclosure Filers* functionality, there are filters available so that the group of reports shown in the list can be made more specific. The list shows both filed reports and those that have been assigned to the individual filers but have not yet been completed and filed. If a report is filed, a PDF of it can be viewed.

6.2.3 Searches

Searches are intended to zero in on specific filers or reports, more quickly than you may be able to get there using the Explores. For example, you may be looking for a specific filer. It is faster to get to what you need by doing a specific search rather than using the Explores. This can be accomplished from the search bar on the public site heading.