State of Delaware Campaign Finance Reporting System

Committee Training Manual

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1.0 Overview

The State of Delaware Campaign Finance Reporting System's Committee Modulehas the following functions:

- Reconnect to your Committee
- Reminders
- View/Edit Registration Information
- Create Sub-Committee
- Enter Contributions/Transfers/In-kind Contributions
- Enter Expenditures and Debts Incurred
- Enter Non-Candidate Loans
- Enter Loan Payments
- Enter Return Contributions
- Enter Debts Incurred Paid
- Edit / File Pending Transactions
- Amend Transactions
- Upload Transactions
- Maintain Users
- Maintain Fixed Assets
- Change Username/Password

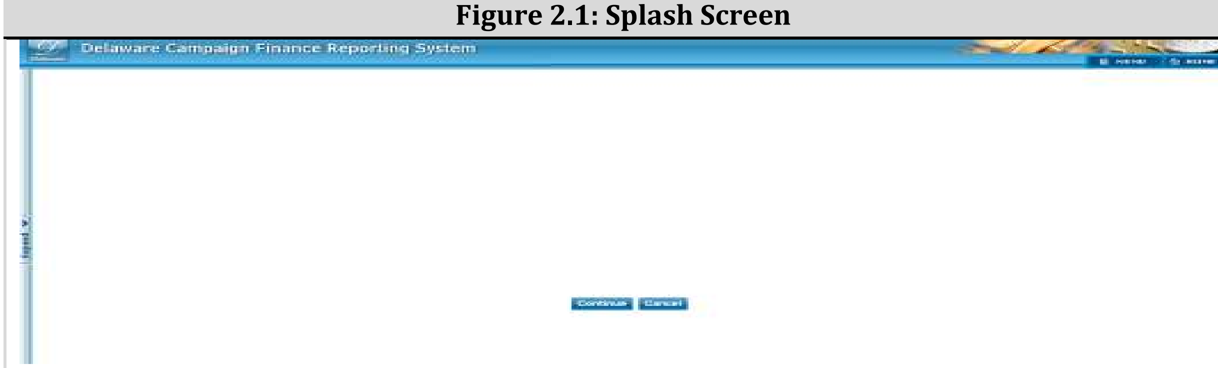
2.0 Reconnect to your Committee

This screen allows the users to connect to their existing committee in the new Delaware Campaign Finance Reporting System.

Figure 2.0: Delaware Campaign Finance Reporting System

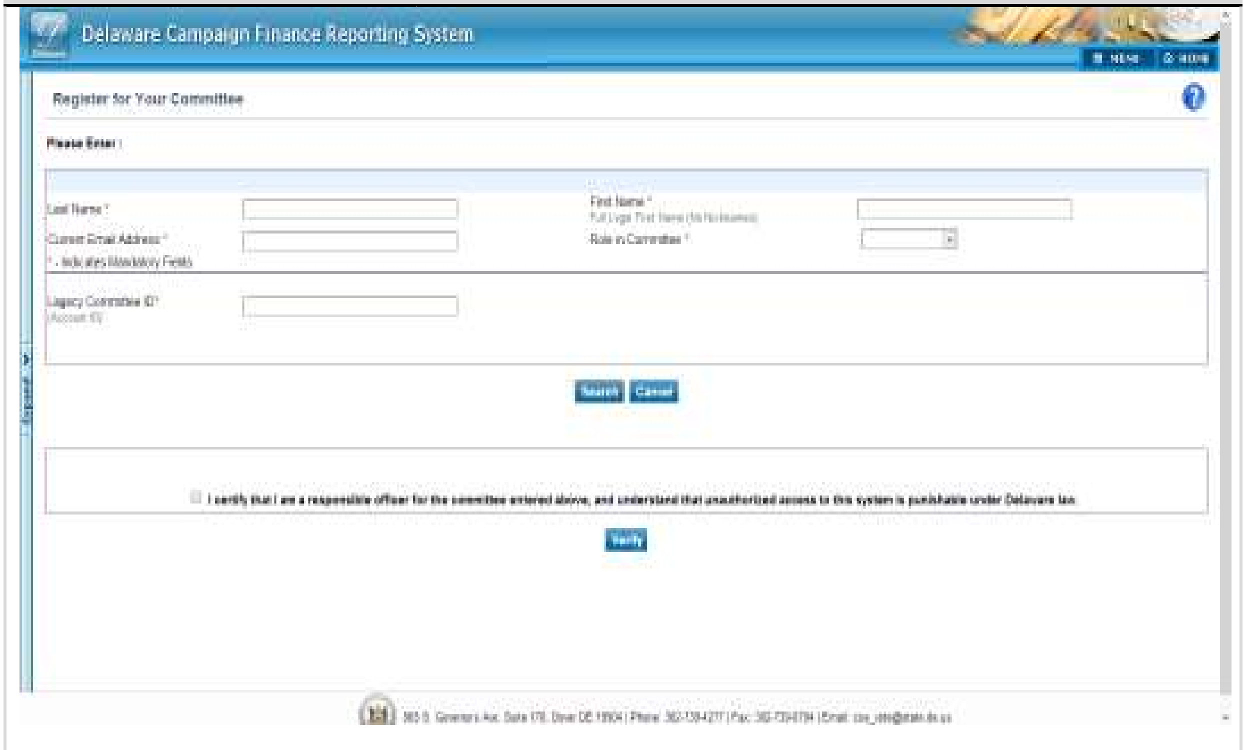
- Open your web browser and enter the Delaware Campaign Finance Reporting System address "https://cfrs.elections.delaware.gov" in the address bar.
- The State of Delaware Campaign Finance Reporting System Home Page will be displayed.
- Click on "Reconnect to your Committee" link at the bottom right-hand corner of the home page.
- System displays a splash screen with instructions.

Figure 2.1: Splash Screen



- Click on “Continue” button.
- System displays the “Reconnect to your Committee” page.

Figure 2.2: Reconnect to your Committee



- The symbol “*” next to the field label on the page indicates that the field is required and the appropriate information must be entered in the field.
- Enter the information in the required fields.
  Note: The email address entered here will be assigned as your username to login into your committee.
- If you wish to try later, click “Cancel” button. This will exit the “Reconnect to your Committee” process.
- Upon clicking on “Search” button, system will validate the entered information.
- If validation is successful then system displays the checkbox “**I certify that I am a responsible officer for the committee entered above, and understand that unauthorized access to this system is punishable under Delaware law”** and the “Verify” button.
- Upon checking the checkbox and clicking on the “Verify” button, system will send an automated email to the email address entered on the “Reconnect to your Committee” page with your username& temporary password.
- To logininto your committee use the credentials provided in the email, refer to “3.0 Committee Login” below.

3.0 CommitteeLogin

This screen allows a valid Committee user to login into the Delaware Campaign Finance Reporting System.

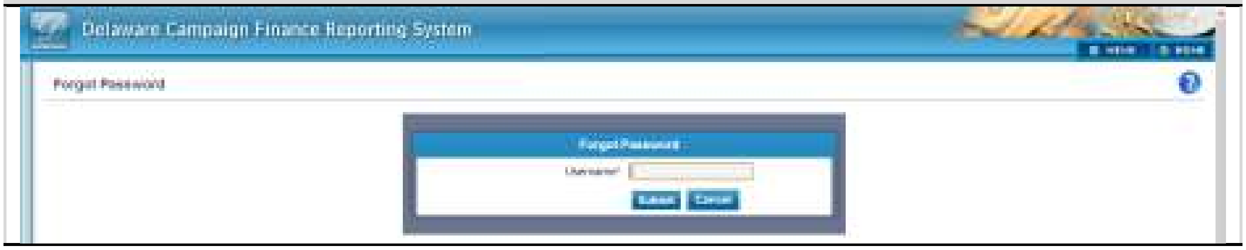
Figure 3.0: Committee Login

- Open your web browser and enter the Delaware Campaign Finance Reporting System address "https://cfrs.elections.delaware.gov" in the address bar.
- The Delaware Campaign Finance Reporting System Home Page will be displayed.
- Under Login section, enter your Username& Password and click onthe "Login" button.
  Note: The email address provided as part of your details on the Statement of Organization will be assigned as your Username.
  Note: If you are reconnecting to your committee for the first time then enter the Username & temporary Password provided in the email to successfully change your password and login into your committee.
- If you enter an incorrect Username and/or Password, you will receive a prompt stating "Your login attempt was not successful. Please try again." To try again, click "OK."
  Note:*After Five unsuccessful attempts to login, your account will be locked.*
- After logging in successfully, the Reminders screen will appear.

4.0 Forgot Password

This screen allows a valid Committee user to retrieve a forgotten password.

Figure 4.0: Forgot Password



- If you do not remember your password to login into Delaware Campaign Finance Reporting System (CFRS), click "Forgot Password" link on the Home Page.
- The Forgot Password page will be displayed.
- Enter theUsername that you use for logging into Delaware CFRS.
- Click on the "Submit" button.
- You will receive an email with a reset (new) password.
- Enter the username and reset (new) password provided in the email to successfully change your password and login into your committee.
- If you remember your password or wish to try later, click "Cancel" in the dialogue box. This will exit the "Forgot Password" process.
  Note:*The Forgot Password functionality will work only if you haven't exhausted your five attempts to successfully login into CFRS.*

5.0 Reminders

This screen displays messages from Campaign Finance administrator,reminders about upcoming reporting due dates and the tasks section.

Figure 5.0: Reminders

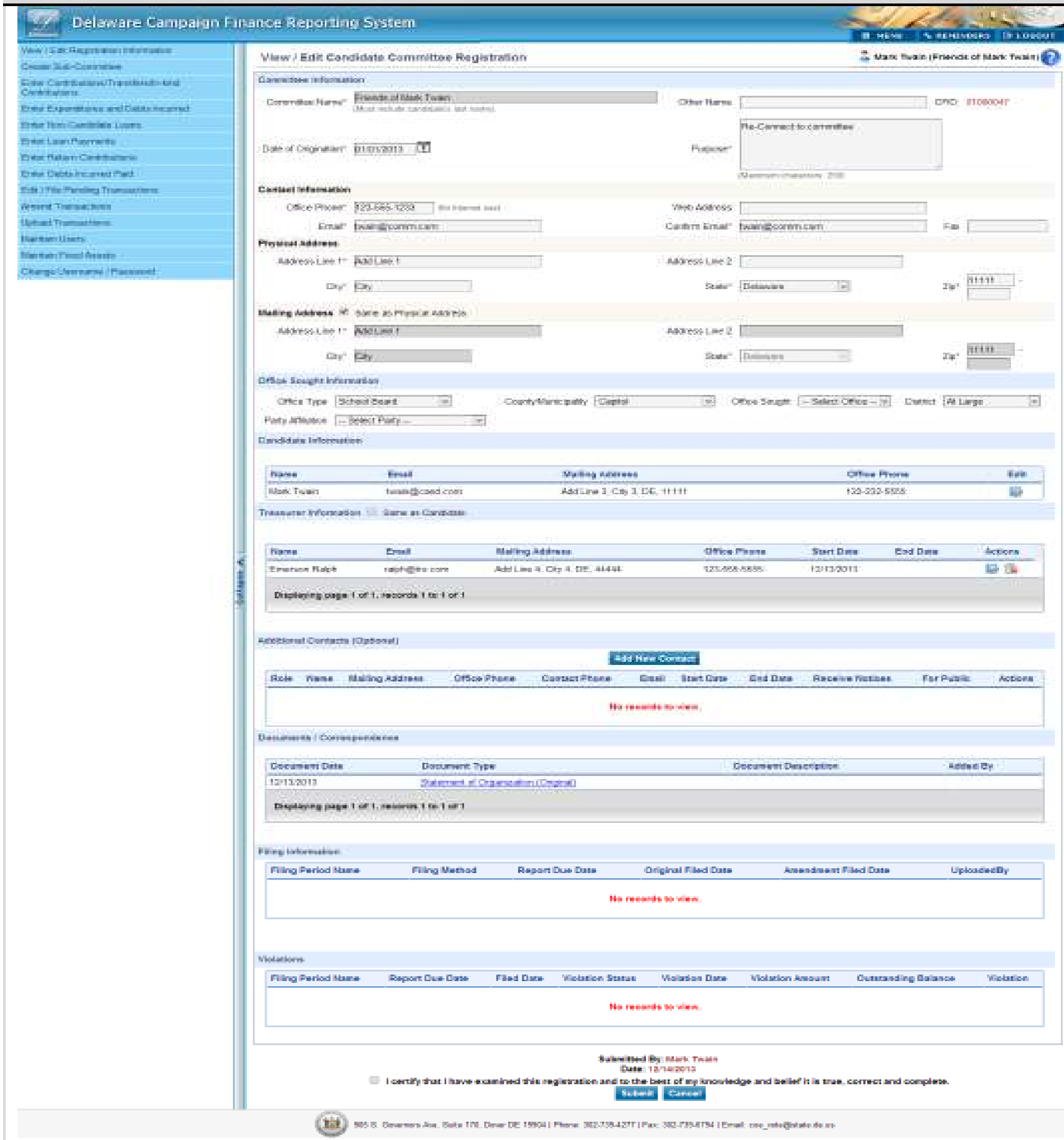
- After successfully logging into the CFRS, the Reminders screen appears.
- You can also access the Reminders screen by clicking on the Reminders menu (at top right of the screen) anytime.
- Logged in user's name and Committee Name are displayed at the top right of the screen.
- To view the left side menu, click the (expand arrow) available on the left side of the screenand to collapse the left side menu, click the (collapse arrow).

Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

6.0 View/Edit Registration Information

This screen allows you to view and/or edit your Committee's registration informationi.e. Statement of Organization.

Figure 6.0: View/EditRegistration Information



6.1 View Statement of Organization

- Login to CFRS as a valid user.
- Once logged in as a valid user, click on the "View/Edit Registration Information" link on the left side of the screen.
- The appropriate Statement of Organization for the logged-in Committee will be displayed.

6.2 Edit Statement of Organization

- To edit a field in your Statement of Organization, click inside of it. Clicking a field will place the cursor inside of the field. You can then edit the field. If the field is a drop down menu, click on the menu to display available values. Select the desired value from the drop down menu.
  Note: *Fields displayed in gray cannot be edited.*
- After you have made all of the changes to the fields you want to edit, check the box "**I certify that I have examined this registration and to the best of my knowledge and belief it is true, correct and complete.**"
- Click the "Submit" button on the bottom of the screen.
- The changes you made will be submitted and saved to the system.

6.3 View/Print Completed Statement of Organization

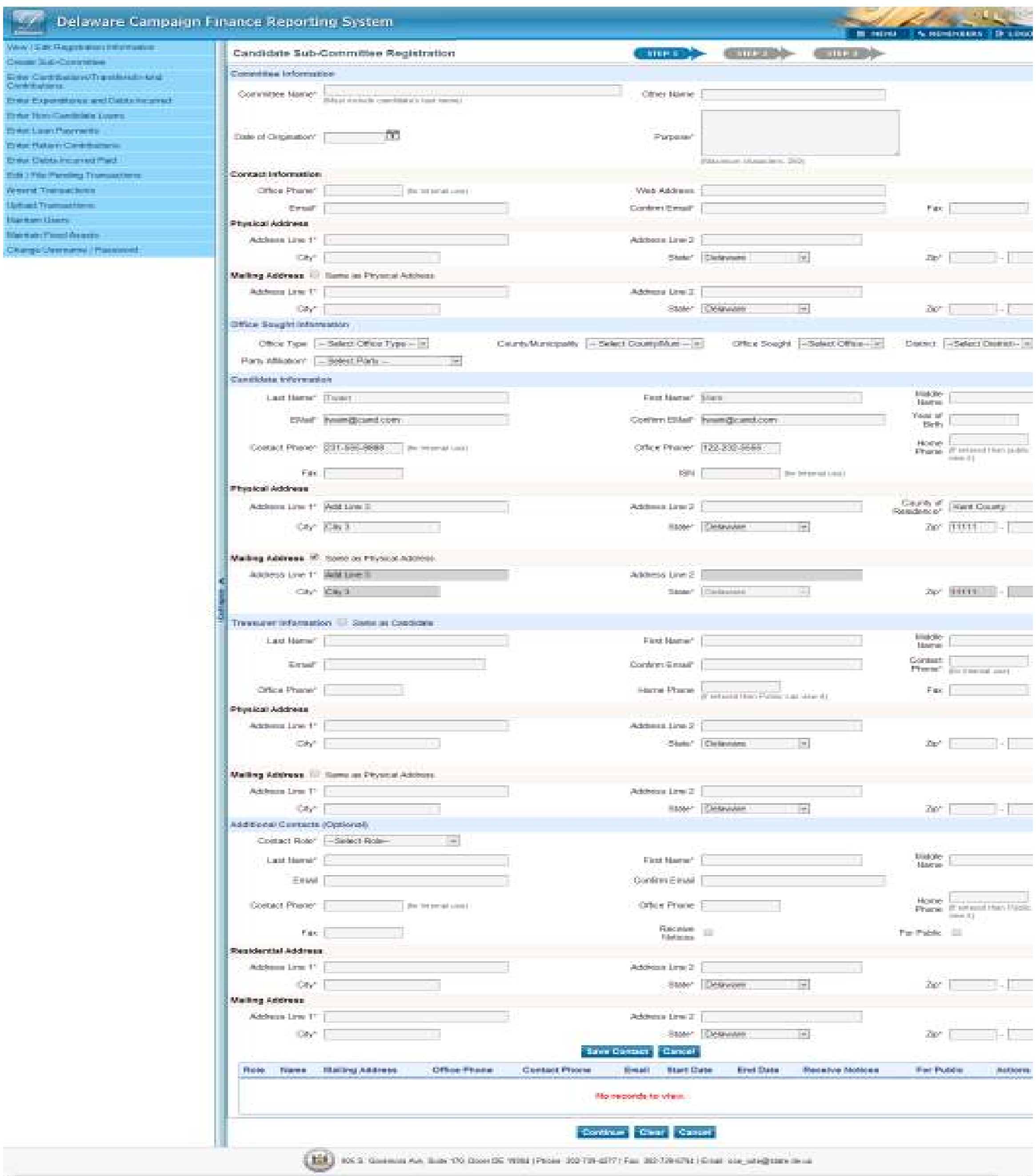
- Upon clicking on the desired documents links under the "Documents / Correspondence" section on the "View / Edit Candidate Committee Registration" screen, you are able to view and print the Statement of Organization forms and also any documents related to this committee.

Tip: *Anytime you need help with the screen that you are currently on, click the ? (question mark) at the top right corner of the screen.*

7.0 Create Sub-Committee

This screen allows a Candidate Committee to create a Sub-Committee.

Figure 7.0: Create Sub-Committee



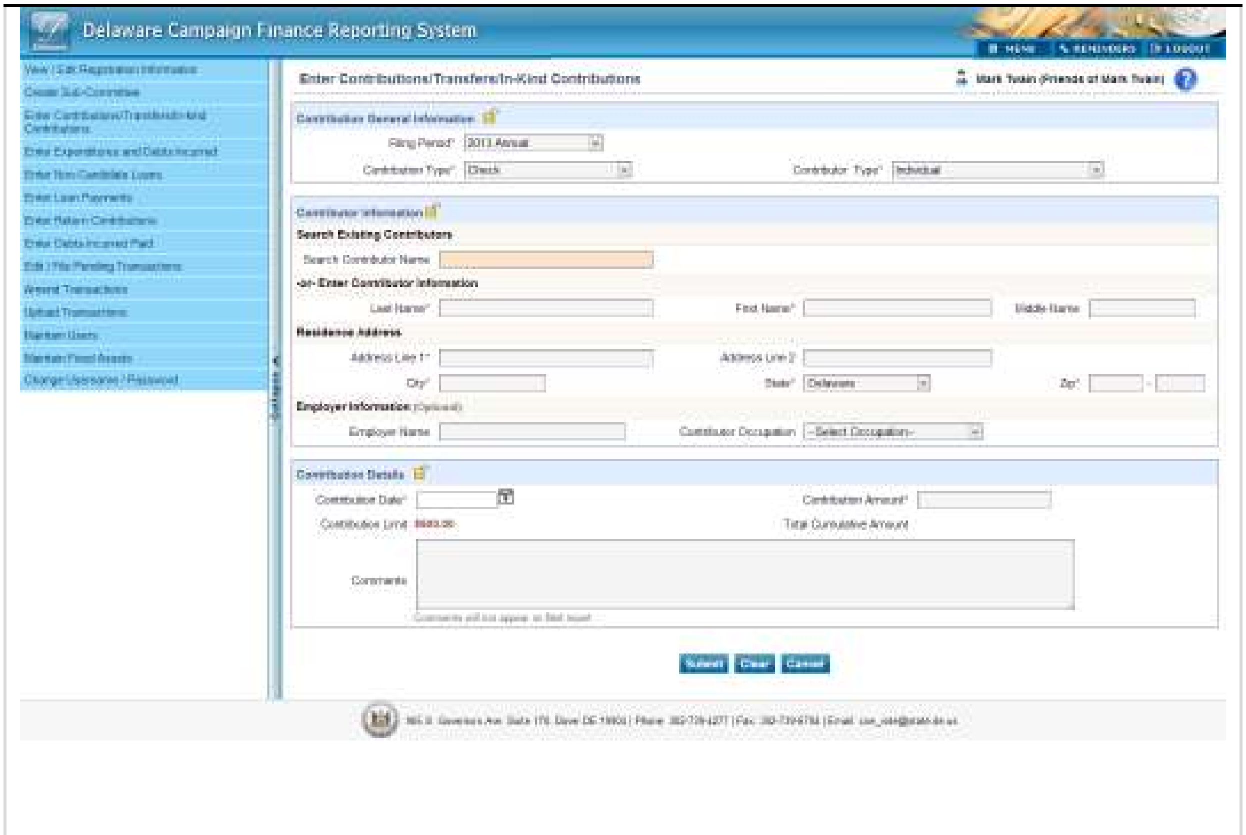
- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Create Sub-Committee” link on the left side of the screen.
- System will display the “Candidate Sub-Committee Registration”page and prepopulates the candidate information on the page from the parent committee registration information.
  Note: Under Candidate Information section on the page, the fields Last Name, First Name, and Middle Name are read-only.
- All fields marked with “*” are required.
- To enter the information in a field, click inside of it. Clicking a field will place the cursor inside of the field. You can then enter the appropriate information in the field. If the field is a drop down menu, click on the menu to display available values. Select the desired value from the drop down menu.
  Note: *Fields displayed in gray cannot be edited.*
- After you have entered the appropriate information in the fields, click the “Continue” button on the bottom of the screen. This will advance you to a read-only screen (Step 2 screen) where you are able to review the Statement of Organization you have just entered.
- Review all the information on Step 2 screen and if all of the information on your Statement of Organization is as you want it, click the “Submit” button on the bottom of the screen.
- System will save the information entered and will navigate you to Step 3 Screen.
- If, after reviewing on Step 2 screen, you are not satisfied with all of the information on your Statement of Organization, click the “Step 1” button on the bottom of the screen. This will return you to Step 1 screen and allow necessary changes to be made. After you have made necessary changes on Step 1 screen, click the “Continue” button on the bottom of Step 1 screen to be advanced to Step 2 screen.
- Once you reach Step 3, you have successfully submitted your Statement of Organization to the system.
- From this screen, you are able to view and print the Statement of Organization forms that the system has generated for you based on the information you have entered in Step 1.
- Click the View/Print link on the system generated forms to either open the form as a PDF document or save it to a file as a PDF document.
-

  Tip: *Anytime you need help with the screen that you are currently on, click the ? (question mark) at the top right corner of the screen.*

8.0 Enter Contributions/Transfers/In-kind Contributions

This screen allows you to enter election campaign contributions received by the committee from different sources.

Figure 8.0: Enter Contributions/Transfers/In-kind Contributions



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Enter Contributions/Transfers/In-kind Contributions” link on the left side of the screen.
- All fields marked with “*” are required.
- The icon “ ” can be used to lock the details entered in a section. Click on the icon to lock the details entered in a section. Now, the icon will be displayed as “ ” in the header of the section.
- System will prepopulate those details in the section for you on the screen until you unlock the section by clicking on the icon again.
- The above process will help you to enter multiple transactions which have the same details, faster.

8.1 Enter Contribution

- On the “Enter Contributions/Transfers/In-kind Contributions” screen, populate the fields with all of the information you want included for the contribution you are entering.
  Note:*Many fields contain a drop down menu with the relevant values to be used to populate that particular field.*

- Contributor Name is a type-ahead search. You need to enter at least 3 characters to perform a type-ahead search.
- If you are entering a New Contributor, you do not need to populate the Contributor Name field in "Search Existing Contributors" of this screen. The information you enter into the Contributor Details section takes the place of the Contributor Name field in "Search Existing Contributors" Section.

8.2 Save Contribution

- After you have populated all of the required fields, and any others you want to fill out, click the "Submit" button at the bottom of the screen. This submits and saves your contribution into the CFRS system and clears all fields on the "Enter Contributions/Transfers/In-kind Contributions" screen except those sections which were locked by clicking on the icon " ", for using those details for other contributions.
  Note: *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your contributions for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*
- You can repeat this process for as many contributions as you need to enter.
- Contribution Limit and Cumulative Amount are automatically populated by the system, as a read-only display, based on the contributions entered.

8.3 Cancel

- To exit the screen without entering any new information into the system, click the "Cancel" button.

8.4 CheckTransactions for Compliance:

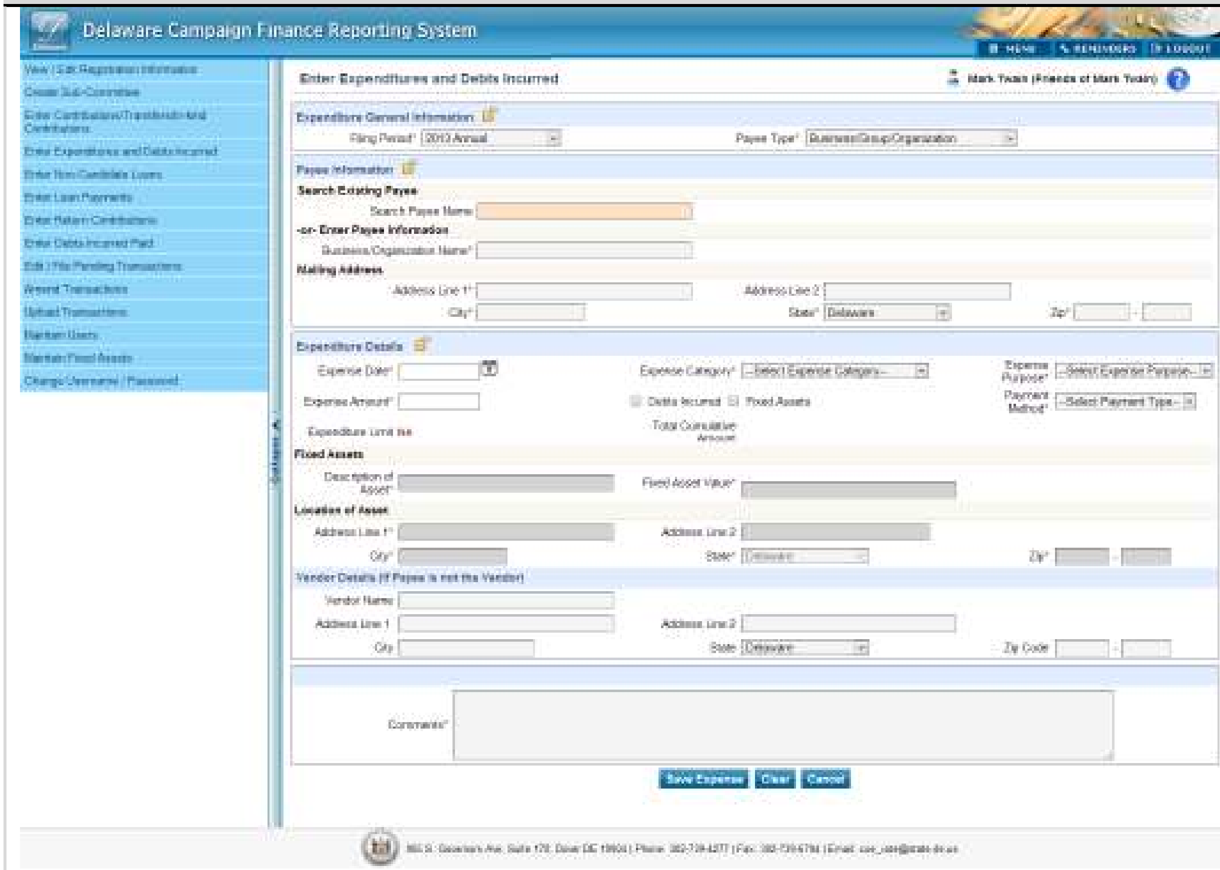
- After you have entered a contribution into the system by clicking the "Submit" button on the bottom of the "Enter Contributions/Transfers/In-kind Contributions" screen, the system checks the transactions you entered for compliance.
- To review your transactions for compliance, click on the "Edit/File Pending Transactions"link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Non-compliant transactions are flagged with a (red flag)on this page and you can edit them from here.Compliant transactions are flagged with a (green flag).

  Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

9.0 Enter Expenditures and Debts Incurred

This screen allows a committeeto enter election campaign Expenditures and Debts Incurred by the committee.

Figure 9.0: Enter Expenditures and Debts Incurred



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Enter Expenditures and Debts Incurred” link on the left side of the screen.
- All fields marked with “*” are required.
- The icon “ ” can be used to lock the details entered in a section. Click on the icon to lock the details. Now, the icon will be displayed as “ ” in the header of the section.
- System will prepopulate those details in the section for you on the screen until you unlock the section by clicking on the icon again.

- The above process will help you to enter multiple transactions which have the same details, faster.

9.1 Enter Expenses/Debts Incurred

- On the “Enter Expenditures and Debts Incurred” screen, populate the fields with all of the information you want included for the expenditure you are entering.
  Note:*Many fields contain a drop down menu with the relevant values to be used to populate that particular field.*
- Payee Name is a type-ahead search. You need to enter at least 3 characters to perform a type-ahead search.
- If you are entering a New Payee, you do not need to populate the Payee Name field in “Search Existing Payee”Sectionof this screen. The information you enter into the Payee Details section takes the place of the Payee Name field in Search Existing Payee”Section.
- If Vendor is different than the Payee, enter Vendor Details.

9.2 Save Expenses

- Once you are done entering expenditure for that Payee, click the“Submit” button on the bottom of the screen. This submits your expenditure into the CFRS system and clears all fields on the “Enter Expendituresand Debts Incurred”screen except those sections which you locked by clicking on the icon “ ”, for using those details for other expenditures.
- You can repeat this process for as many expenses as you need to enter.

9.3 Cancel

- To exit the screen without entering any new information into the system, click the “Cancel” button.

9.4 Check Transactions for Compliance

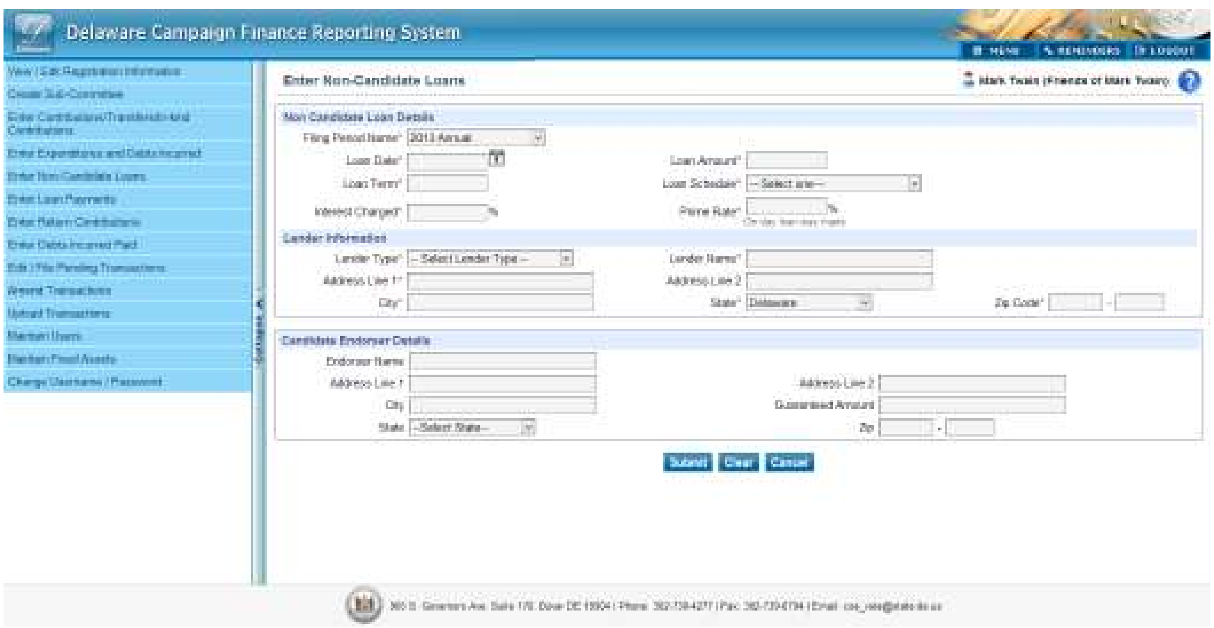
- After you have entered expensesinto the system by clicking the “Submit” button on the bottom of the “Enter Expenditures and Debts Incurred”screen, the system checks the transactions you entered for compliance.
- To review your transactions for compliance, click on the “Edit/File Pending Transactions” link on the left-side menu.
- The “Edit/File Pending Transactions” screen shows all transactions that have been entered and are in “Pending” status. Non-compliant transactions are flagged with a (red flag) on this page and you can edit them from here. Compliant transactions are flagged with a (green flag).
  Note:*Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your expenditures for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*

Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

10.0 Enter Non-Candidate Loans

This screen allows a committee to enter commercial loans that have been received from financial institutions and businesses.

Figure 10.0: Enter Non-Candidate Loans



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Enter Non-Candidate Loans” link on the left side of the screen.
- Fields marked with “*” are required.

11.1 Enter Non-Candidate Loan Details

- On the “EnterNon-Candidate Loans” screen, populate the fields with all of the information you want included for the loan you are entering.
  Note: *Many fields contain a drop down menu with the relevant values to be used to populate that particular field.*

11.2 Save Non-Candidate Loan

- Once you are done entering loanfrom that Lender, click the“Submit” button at the bottom of the screen. This submits your loan into the CFRS system and clears all fields on the “EnterNon-Candidate Loans” screen.
- You can repeat this process for as many loans as you need to enter.

11.3 Cancel

- To exit the screen without entering any new information into the system, click the "Cancel" button.

11.4 Check Transactions for Compliance

- After you have entered loans into the system by clicking the "Submit" button at the bottom of the "EnterNon-Candidate Loans" screen, the system checks the information you entered for errors.
- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a (red flag)on this page and you can edit them from here. Transactions without errors are marked with a (green flag).

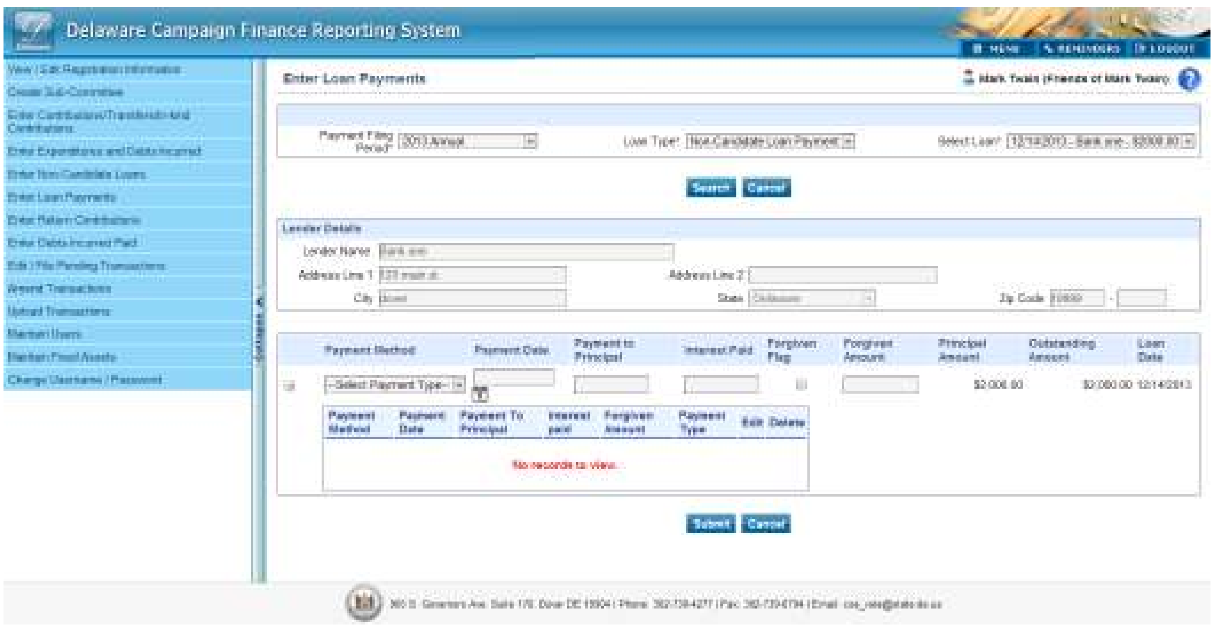
  Note: *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your loans for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*

  Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

11.0 Enter Loan Payments

This screen allows a Committee to return contributions received in the form of loans and also to enter payments received by the committeefrom other entities.

Figure 11.0: Enter Loan Payments



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Enter Loan Payments” link on the left side of the screen.
- Fields marked with “*” are required.
- Populate the fields you would like to search within and click “Search”. The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed below the search fields.
- To cancel all search results and all fields, click the “Cancel” button. This will navigate you to the reminders screen.
- Lender Details (Name and Address) and Transaction Details are populated.
- To open individual loan payments, click the“+” (plus sign) against loan payment in the grid.
- To exit the screen without entering any new information into the system, click the “Cancel” button.
- After you have entered loan payments into the system by clicking the “Submit” button at the bottom of the “Enter Loan Payments” screen, the system checks the information you entered for errors.

- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a (red flag)on this page and you can edit them from here. Transactions without errors are marked with a (green flag).

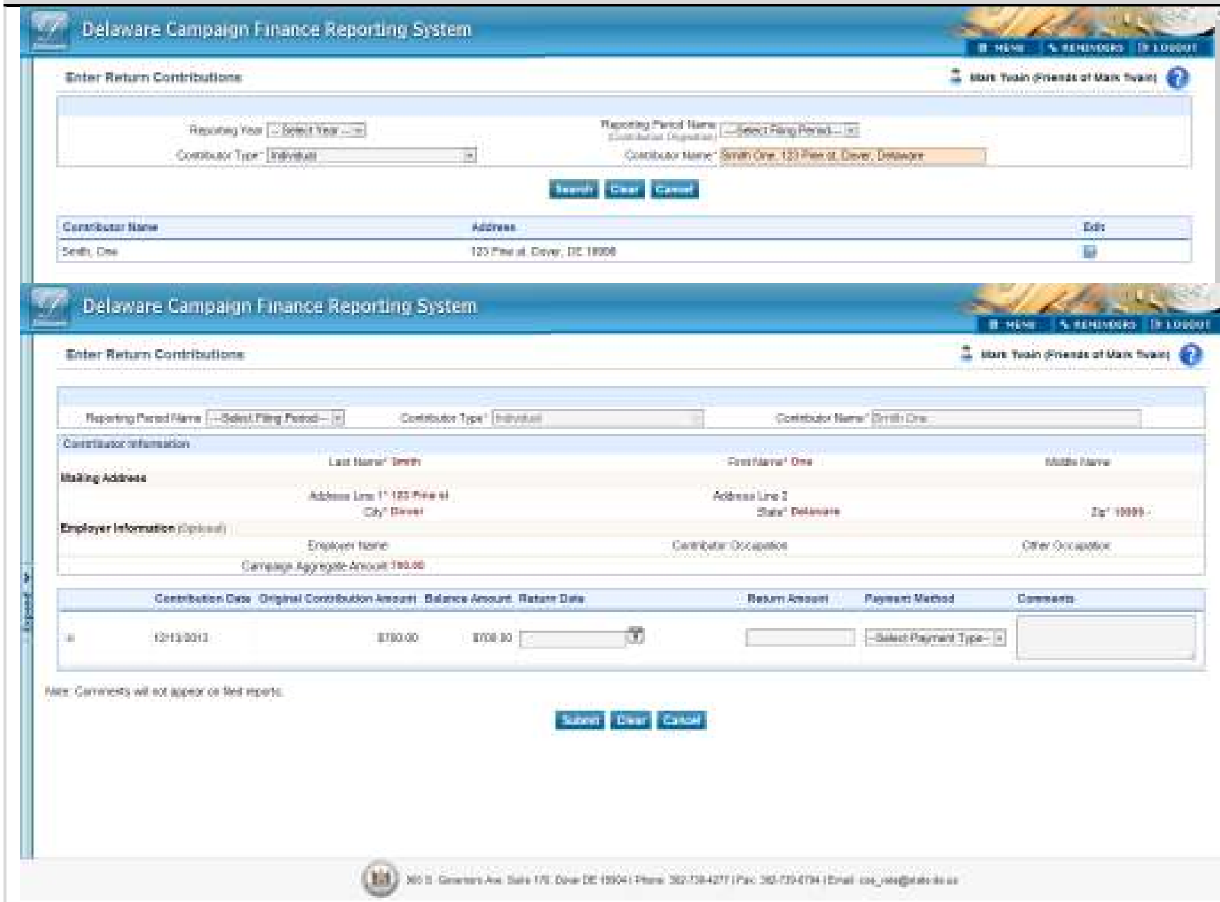
  Note: *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your debt payments for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*

  Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

12.0 Enter Return Contributions

This screen allows a committee to return entire or partial contributions received.

Figure 12.0: Enter Return Contributions and Reimbursements



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Enter Return Contributions” link on the left side of the screen.
- Fields marked with “*” are required.
- When all the required fields have been populated, click the “Search” button.
- Click “Clear” to erase the search criteria entered.
- System will display the Contribution Details in a grid.
- Click the “Edit” button in the grid to return a contribution.
- To exit the screen without entering any new information into the system, click the “Cancel” button.

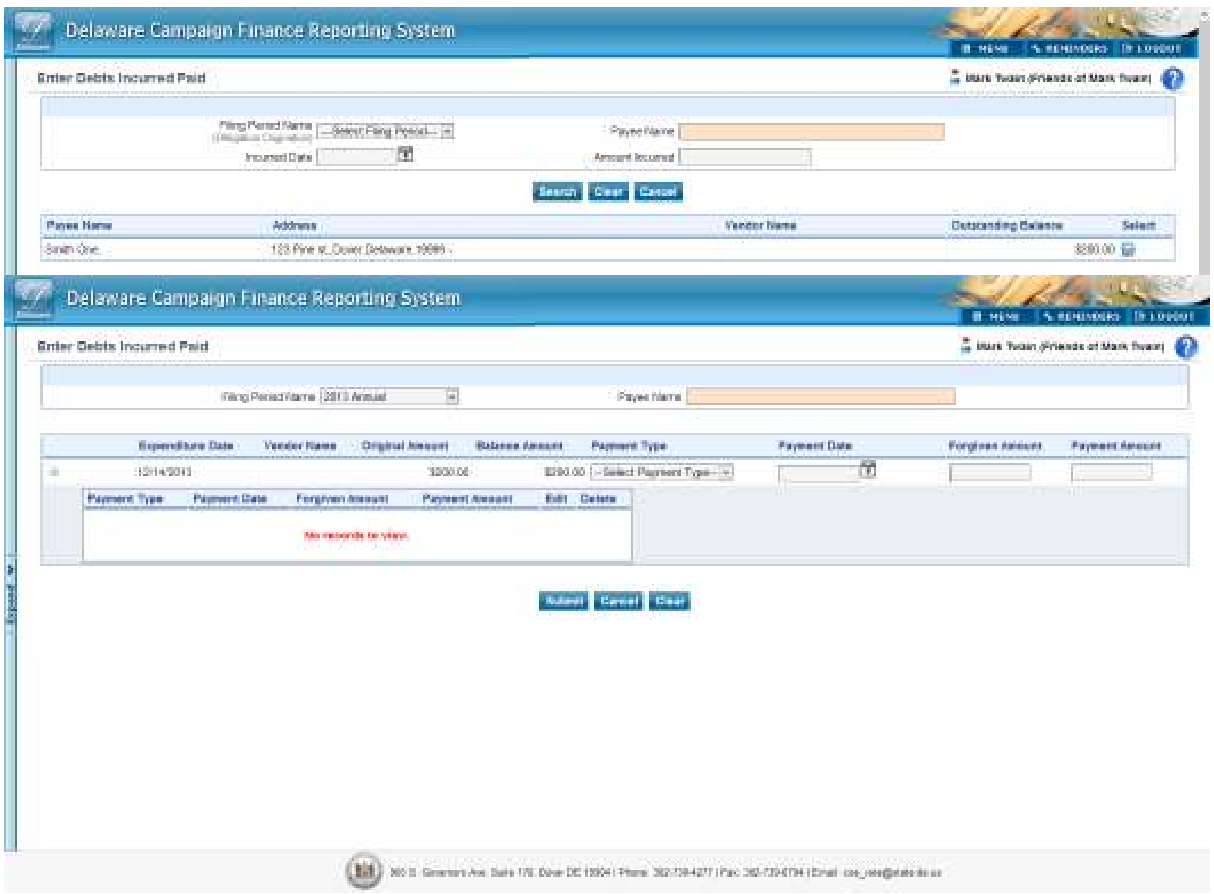
- After you have entered returned contributions into the system by clicking the "Submit" button at the bottom of the "Enter Returned Contributions" screen, the system checks the information you entered for errors.
- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a (red flag) on this page and you can edit them from here. Transactions without errors are marked with a (green flag).
  Note: *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your return contributions for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*

  Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

13.0 Enter Debts Incurred Paid

This screen allows a committee to enter payments againstDebts Incurred.

Figure 13.0: Enter Debts Incurred Paid



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the "Enter Debts Incurred Paid" link on the left side of the screen.
- Fields marked with "*" are required.
- Populate the fields you would like to search within and click "Search". The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed below the search fields.
- To clear all search results and all fields, click the "Clear" button. This effectively resets the Enter Debts Incurred Paid screen.
- Payee Details and Transaction Details are auto populated.

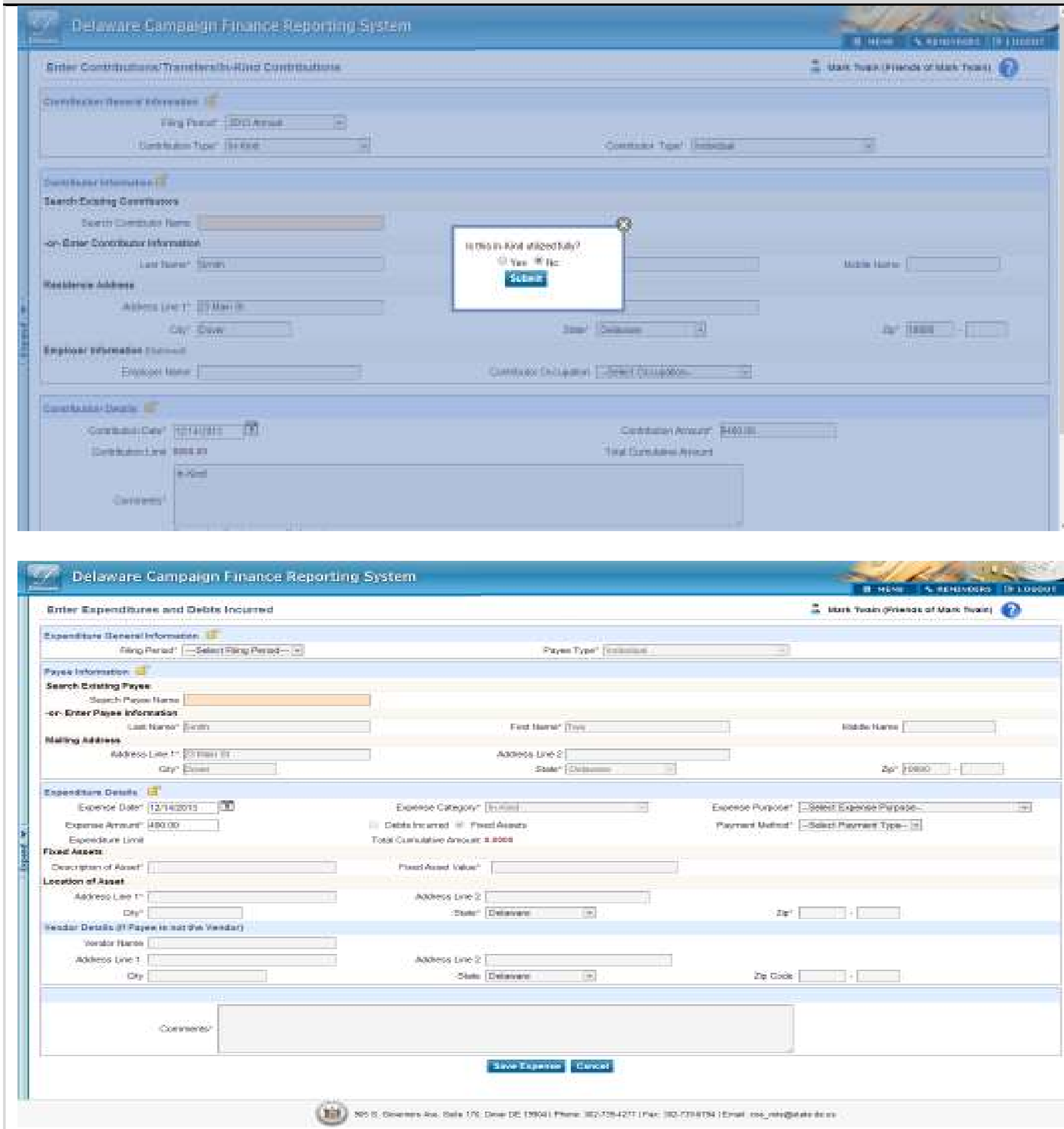
- To open individual Debts Incurred, click the "Edit" button against individual transactions in the Transaction Details grid.
- To exit the screen without entering any new information into the system, click the "Cancel" button.
- After you have entered Debts Incurred into the system by clicking the "Submit" button at the bottom of the "Enter Debts Incurred Paid"screen, the system checks the information you entered for errors. Unpaid expenses are called Debts Incurred.
- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a (red flag) on this page and you can edit them from here. Transactions without errors are marked with a (green flag).
  Note: *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your Debts Incurred for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*

  Tip: *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

14.0 Maintain Fixed Assets

The below process explains you how to enter a fixed asset and maintain it.

Figure 14.0: Entering a Fixed Asset



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user,
    - An In-kind Contribution which is not fully utilized (i.e. Fixed Asset) can be entered from the "Enter Contributions/Transfers/In-kind Contributions" screen. Refer to 8.0 for entering a contribution.
    - An expenditure which results in a Fixed Asset can be entered from the "Enter Expenditures/Debts Incurred" screen. Refer to 9.0 for entering an expenditure.
- All fields marked with "*" are required.
- The icon " " can be used to lock the details entered in a section. Click on the icon to lock the details entered in a section. Now, the icon will be displayed as " " in the header of the section.
- System will prepopulate those details in the section for you on the screen until you unlock the section by clicking on the icon again.
- The above process will help you to enter multiple transactions which have the same details, faster.

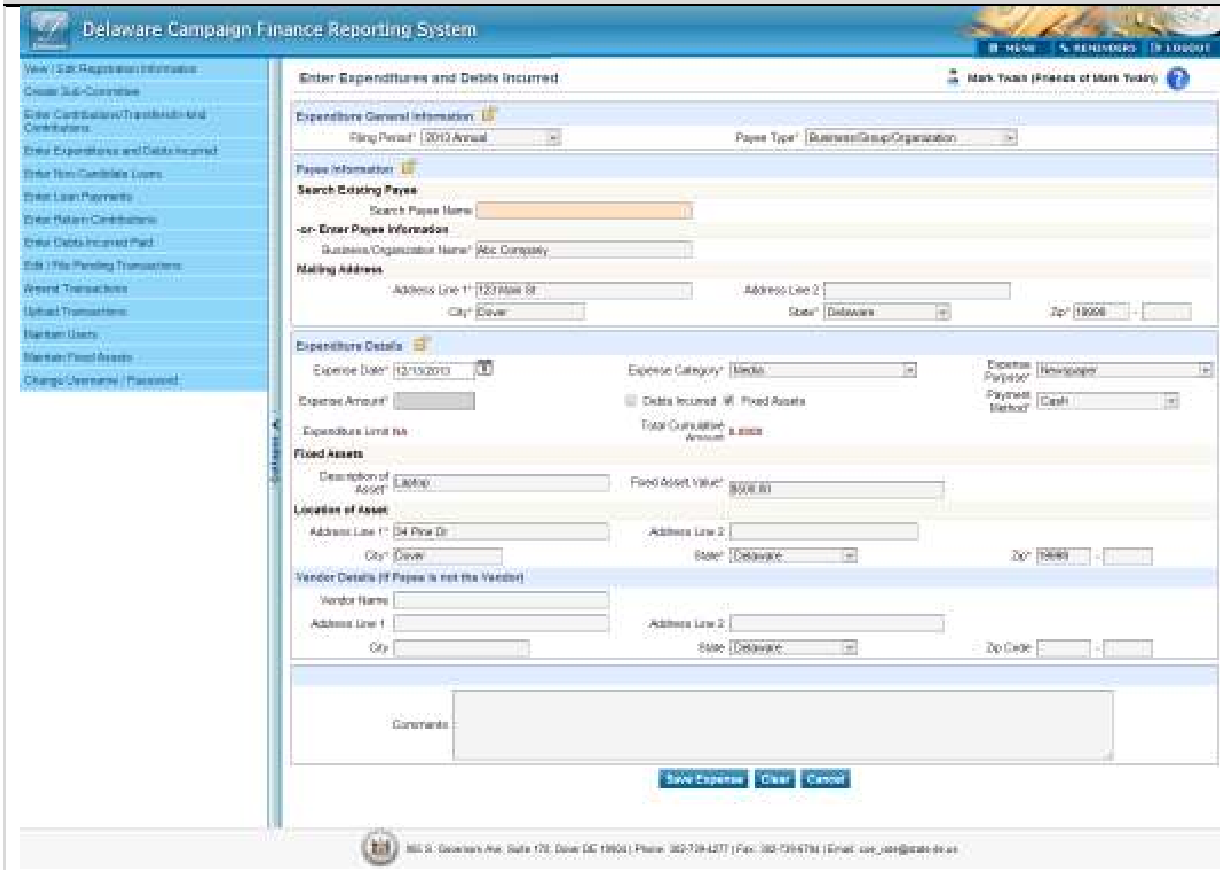
14.1 In-Kind Contribution (Fixed Asset)

- Enter an In-kind contribution on the "Enter Contributions/Transfers/In-kind Contributions" screen by selecting the contribution type as "In-kind" and appropriate contributor type, and populate the remaining fields with all of the information you want included for the In-kind contribution you are entering.
  Note: *Many fields contain a drop down menu with the relevant values to be used to populate that particular field.*
- Contributor Name is a type-ahead search. You need to enter at least 3 characters to perform a type-ahead search.
- If you are entering a New Contributor, you do not need to populate the Contributor Name field in "Search Existing Contributors" of this screen. The information you enter into the Contributor Details section takes the place of the Contributor Name field in "Search Existing Contributors" Section.
- After you have populated all of the required fields, and any others you want to fill out, click the "Submit" button at the bottom of the screen.
- System will display a popup box "Is this In-kind utilized fully?" with "Yes" & "No" radio-buttons and "Submit" button.
- Select "No" and click on the "Submit" button.
- This submits and saves your In-kind contribution into the CFRS system and navigates you to the "Enter Expenditures/Debts Incurred" screen to enter the related In-kind expenditure details and the fixed asset details.
- After you have populated all of the required fields, and any others you want to fill out, click the "Submit" button at the bottom of the screen.
- This submits and saves your In-kind expenditure and fixed asset details into the CFRS system.
- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.

- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a (red flag) on this page and you can edit them from here. Transactions without errors are marked with a (green flag).
    - **Note:** *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your contributions for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*
- You can repeat this process for as many In-kind contributions as you need to enter.

14.2 Expenditures – Fixed Asset

Figure 14.1: Entering a Fixed Asset



- Enter a Fixed Asset on the "Enter Expenditures and Debts Incurred" screen by populating the fields with all of the information you want included for the Fixed Asset you are entering.

__Note:__ Many fields contain a drop down menu with the relevant values to be used to populate that particular field.

- Payee Name is a type-ahead search. You need to enter at least 3 characters to perform a type-ahead search.
- If you are entering a New Payee, you do not need to populate the Payee Name field in "Search Existing Payee" of this screen. The information you enter into the PayeeInformation section takes the place of the Payee Name field in "Search Exiting Payee" Section.

  __Note:__You need to check the box "Fixed Asset" in order to consider this expenditure as a Fixed Asset.
- After you have populated all of the required fields, and any others you want to fill out, click the "Submit" button at the bottom of the screen.
- This submits and saves your expenditure as a Fixed Asset into the CFRS system.
- To see if the system has found any errors, click on the "Edit/File Pending Transactions" link on the left-side menu.
- The "Edit/File Pending Transactions" screen shows all transactions that have been entered and are in "Pending" status. Errors will be flagged with a (red flag) on this page and you can edit them from here. Transactions without errors are marked with a (green flag).

  __Note:__ Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your contributions for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.
- You can repeat this process for as many Fixed Assets as you need to enter.

14.3 Maintain Fixed Asset

Figure 14.1: Maintain Fixed Asset

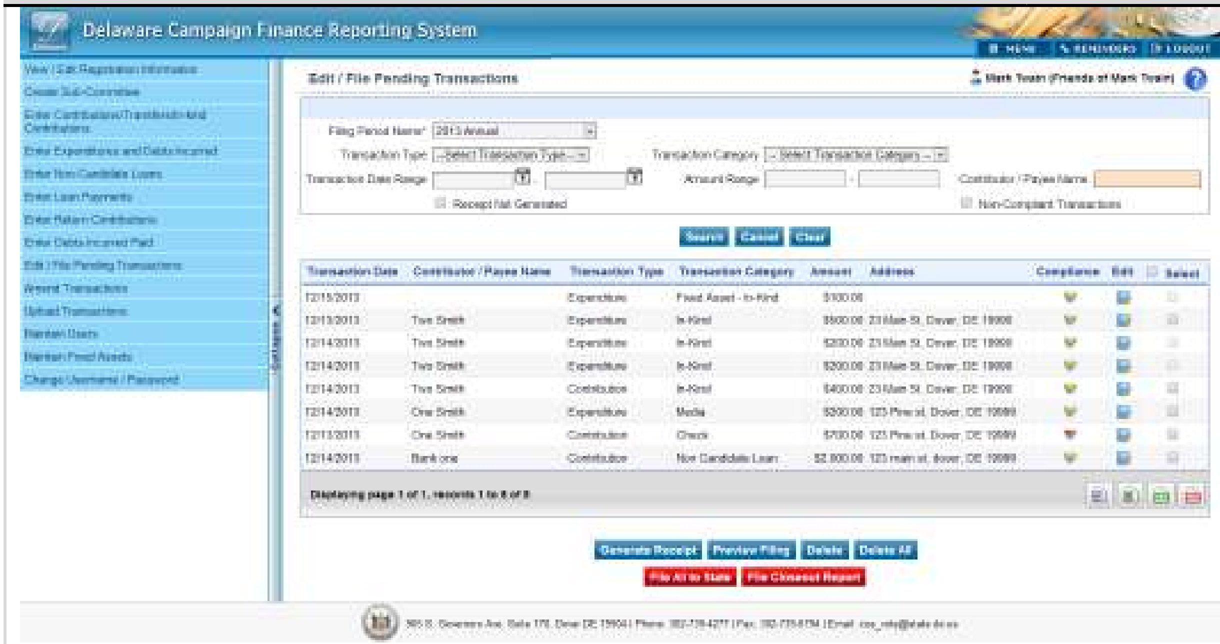
- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the “Maintain Fixed Assets” link on the left side of the screen.
- Fields marked with “*” are required.
- Populate the fields you would like to search within and click “Search”. The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed below the search fields.
- To clear all search results and all fields, click the “Clear” button. This effectively resets the screen.
- To exit the screen without entering any new information into the system, click the “Cancel” button.
- FixedAsset details are auto populated with “Depreciation” and “Eliminate” radio-buttons.
- Select the appropriate radio-button and enter Fixed Asset details into the system by clicking the “Save” button at the bottom of the “Maintain Fixed Assets”screen.
- This submits and saves your Fixed Asset details into the CFRS system.
- To see if the system has found any errors, click on the “Edit/File Pending Transactions” link on the left-side menu.
- The “Edit/File Pending Transactions” screen shows all transactions that have been entered and are in “Pending” status. Errors will be flagged with a (red flag) on this page and you can edit them from here. Transactions without errors are marked with a (green flag).
  Note: *Your transaction has not been filed to the STATE ELECTION COMMISSIONER Office yet. The transaction has been saved in the Edit/File Pending holding table. When all of your Debts Incurred for this report have been entered and saved using the data entry screens, go to Section 12.0 of this manual and follow the steps provided to file your report with the STATE ELECTION COMMISSIONER Office.*

- ***Tip:*** *Anytime you need help with the screen that you are currently on, click the (question mark) at the top right corner of the screen.*

15.0 Edit/File Pending Transactions

This screen allows a committee to edit, delete, or file pending Contributions, Expenses, Non-Candidate Loans and Loan Payments that have been entered into the system.This screen also allows a Committee to generate receipts for the entered transactions.

Figure 15.0: Edit/File Pending Transactions



- Login into Delaware CFRS with a valid username and password.
- Once logged in as a valid user, click on the "Edit/File Pending Transactions" link on the left side of the screen.
- Fields marked with "*" are required.

15.1 Search for Transactions

- Populate the fields you would like to search within and click "Search". The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed below the search fields.
- To clear all search results and all fields, click the "Clear" button. This effectively resets the Edit/File Pending Transactions screen.

15.2 Save Search Results

- The results of your search can be exported as a PDF, Microsoft Word, Microsoft Excel and/or Comma Separated Values (CSV) document.

- To export your search results as a PDF, click the icon.
- To exportyour search results as a Microsoft Word document, click the icon.
- To exportyour search results as a Microsoft Excel document, click the icon.
- To exportyour search results as a Microsoft Excel Comma Separated Values document, click the icon.
- Clicking any of the four icons above will open a dialogue box that gives you the option to open the document for viewing and/or saving or the option to save the document directly to your computer or external device.
    - To open the document, click the “Open” button. This will open the search results as a separate document in the format that you selected. This document can be saved just as any other document.
    - To save the document without opening it, click the “Save” button. This will open the “Save As” dialogue box and allow you to save the document directly to your computer or external device.
    - If you choose not to view or save the document, click “Cancel” in the dialogue box. This will close the dialogue box and return you to the search results screen.

15.3 Edit Pending Transactions

- Locate the transaction you want to edit from the list of search results. Be aware that only a limited number of search results can be displayed on one screen, so you may have more than one screen of search results. Check the bottom of your search results for links that say “Next Page” and page numbers 1,2,3, etc…). If you see these, your search results fill more than one screen. To see more search results, you will need to click either the “Next Page” link or the page number of the page you would like to be displayed.
- If you do not see the transaction you are looking for in (all pages of) your search results, modify your search criteria and search again.
- When you have located the transaction you want to edit, click on the (edit)for that transaction. This will open the transaction, and all of its fields, on your screen. You are allowed to edit any of the accessible fields of this transaction.
- Opening a transaction to edit it does not clear your search results. They will still be visible after you have finished on the “Edit” screen and returned to the search screen.
- If a field is grayed out, you are not allowed to edit it. You are not able to activate these grayed out fields by clicking on them.
- To make changes to an accessible field (those that are not grayed out), click the field to activate it and make changes.
- After you have made all changes to all fields that you want to change, click the “Submit” button at the bottom of the screen. This will enter the changes you made into the system and return you to your search results in “Edit/File Pending Transactions” screen.
- If, while on the “Edit” screen, you want to return to your search results without saving any of the changes you have made into the system, click the “Cancel” button. This will return you to

your search results in “Edit/File Pending Transactions” screen but will not save any changes that you made on the previous edit screen.

15.4 DeleteSelected Transactions

- To delete a transaction, place a ✓ in the “Select” column to the right of the transaction in the grid results display, then click on the “Delete” button located below the displayed grid results.

15.5 Preview Campaign Statement

- To preview your campaign statement for accuracy, click the “Preview Filing” button. This will result in the appropriate campaign statement being generated for the Committee Type.
- After the “Preview Filing” button has been clicked, system will navigate you to the “Cash Balances” screen where you need to provide the “Prior Reported Ending Balance” and “Reported Ending Balance” amounts and click on the “Generate Preview Filing” button.
- System will navigate you to the “Preview Finance Report” page that shows the report generated with a link labeled “View/Print.”
- To view or print the report, click on the “View/Print” link. This will open a dialogue box that gives you the option to “Open,” “Save,” or “Cancel.”
- If you click “Open,” the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
- If you click “Save”, the “Save As” box will open and you are then able to save the document, without viewing it first, to your computer or to an external drive or disk just as you are able to do with any other file.
- To go back to the “Edit/File Pending Transactions” screen, click the “Back” button.

15.6 File Campaign Statement

- To file all of the transactions in your search results to the STATE ELECTION COMMISSIONER office, click the “File All to State” button. This will navigate you to the Cash Balances” screen that shows the filing period your transactions are in and has the following required fields:
  - Prior Reported Ending Balance(the balance at the beginning of the reporting period)
  - Reported Ending Balance (the balance at the end of the reporting period)
- To complete your filing, populate the Password field in the Authorization box and check the “I certify…” checkbox and click “Submit.” Your transactions will then be filed to the State and a dialogue box will be displayed to this effect.
  Note:*Only a Candidate or a Treasure can file the Campaign Statement by providing their passwords and approval. For a Candidate Committee, the candidate password is required to file the campaign statement.*
- To reset the fields, click “Clear.” This will clear all of the fields.
- To cancel the filing and return to your search results, before you have clicked “Submit”, click “Cancel” in the dialogue box. Your transactions will not be filed to the State, and you will be returned to your search results.
- After your transactions have been filed to the STATE ELECTION COMMISSIONER office, the appropriate report will be generated.
- To view or print the report, click on the “View/Print” link. This will open a dialogue box that gives you the option to “Open,” “Save,” or “Cancel.”

- If you click "Open," the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
- If you click "Save", the "Save As" box will open and you are then able to save the document, without viewing it first, to your computer or to an external drive or disk just as you are able to do with any other file.
- To close the Open/Save/Cancel dialogue box, click the "Cancel" button. This will close the current dialogue box and return you to the dialogue box that lists the report that was generated.

Note: *After successful notification and filing to the STATE ELECTION COMMISSIONER office, an email will be sent to your committee from the system communicating to you that your campaign statement was successfully filed with the STATE ELECTION COMMISSIONER office. Your filed campaign statements are viewable by the public in PDF format. This is done by selecting "View Filed Reports" from the public menu.*

15.7 File Closeout Report

- To request closeout for this Committee during this filing period, click "File Closeout Report" You will then receive a prompt stating, "You must file all pending transactions in order to file closeout report." To continue, click "OK." To not file for closeout and return to the Edit/File Pending Transactions screen, click "Cancel."
- To continue with your request for dissolution, click "OK" when asked if you want to proceed. After you have done this, you will be required to enter the Committee's electronic signature which is the Password.
- Enter the Committee's electronic signature and click "Submit." This will file all pending transactions, generate the campaign statement, flag the request for closeout and post a reminder for the Admin in the Reminders section.

16.0 Amend Filed Transactions

This screen allows a committee to amend Contribution and Expense transactions which have already been filed to the STATE ELECTION COMMISSIONER office.The committee can also add new Contribution and Expense transactions from this screen.

Figure 16.0: Amend Filed Transactions

16.1 Search for a Filed Transaction

- After you have logged in as a Committee, click on the “Amend Transactions” link on the main menu.
- Any, and all, of the fields can be used to search for filed transactions.
- Populate the fields you would like to search within and click “Search.” The results will include only those transactions that meet the search criteria you entered in the search fields. They will be listed below the search fields.
- To clear all search results and all fields, click the “Clear” button. This effectively resets the Amend Filed Transactions screen.

16.2 Saving Search Results

- The results of your search can be exported as a PDF, Microsoft Word, Microsoft Excel and/or Microsoft Excel Comma Separated Values document.
- To export your search results as a PDF, click the  icon.

- To exportyour search results as a Microsoft Word document, click the icon.
- To exportyour search results as a Microsoft Excel document, click the icon.
- To exportyour search results as a Microsoft Excel Comma Separated Values document, click the icon.
- Clicking any of the four icons above will open a dialogue box that gives you the option to open the document for viewing and/or saving or the option to save the document directly to your computer or external device.
- To open the document, click the "Open" button. This will open the search results as a separate document in the format that you selected. This document can be saved just as any other document.
- To save the document without opening it, click the "Save" icon. This will open the "Save As" dialogue box and allow you to save the document directly to your computer or external device.
- If you choose not to view or save the document, click "Cancel" in the dialogue box. This will close the dialogue box and return you to the search results screen.

16.3 Amend a Filed Transaction

- Locate the transaction you want to amend from the list of search results. Be aware that only a limited number of search results can be displayed on one screen, so you may have more than one screen of search results. Check the top and bottom of your search results for links that say "Next Page" and page numbers "1, 2, 3, etc..." If you see these, your search results fill more than one screen. To see more search results, you will need to click either the "Next Page" link or the page number of the page you would like to be displayed.
- If you do not see the transaction you are looking for in (all pages of) your search results, modify your search criteria and search again.
- When you have located the transaction you want to amend, click on the (edit) icon in the line that contains the transaction you want to amend. This will open the transaction, and all of its fields, on your screen. You are allowed to amend any of the accessible fields of this transaction.
- Opening a transaction to edit it does not clear your search results. They will still be visible after you have finished on the "Amend" screen and returned to the search screen.
- If a field is grayed out, you are not allowed to edit it. You are not able to activate these grayed out fields by clicking on them.
- To make changes to an accessible field (those that are not grayed out), click the field to activate it and make changes.
- After you have made all changes to all fields that you want to change, click the "Submit" button at the bottom of the screen. This will save the changes you made into the system and return you to your search results.
- If, while on the "Amend Transactions" screen, you want to return to your search results WITHOUT saving into the system any of the changes you have made, click the "Cancel" button. This will return you to your search results but will not save any changes that you made on the previous amend screen.

16.4 Entering New Transactions from this Screen

- The following new transactions can be entered from this screen:
  - Contributions
  - Expenditures and Debts Incurred
  - DebtsIncurred Paid
  - Loan Payments
  - Non-Candidate Loans
  - Return Contributions
- To add one of these transactions, click the button at the bottom of the screen that says, "Add New (transaction you want)" This will open a screen that is titled "Amend (transaction you have selected)." All of the fields on this screen will be empty, and you are then able to enter the new transaction in them.
- On this new 'Amend' screen, fill in all of the required "*" fields.
- After you have populated all of the required fields, and any others you want populated, click the "Submit" button at the bottom of the screen. This will enter the new transaction into the system and return you to the search results screen.
- If, at any point before you click "Submit", you want to cancel the new transaction without entering it into the system, click the "Cancel" button on the bottom of the screen. This will return you to the search results screen but will NOT save the new transaction into the system.

16.5 Preview Campaign Statement

- To generate a finance report for thecommittee, click the "Preview Campaign Statement" button.
- After the "Preview Filing" button has been clicked, system will navigate you to the "Cash Balances" screen where you need to provide the "Prior Reported Ending Balance" and "Reported Ending Balance" amounts and click on the "Generate Preview Filing" button.
- System will navigate you to the "Preview Finance Report" page that shows the report generated with a link labeled "View/Print."
- To view or print the finance report, click on the "View/Print" link. This will open a dialogue box that gives you the option to "Open," "Save," or "Cancel."
- If you click "Open," the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
- If you click "Save", the "Save As" box will open and you are then able to save the document, without viewing it first, to your computer or to an external drive or disk just as you are able to do with any other file.
- To close the Open/Save/Cancel dialogue box, click the "Cancel" button. This will close the current dialogue box and return you to the dialogue box that lists the report that was generated.

16.6 File Campaign Statement

- To file all of the transactions in your search results to the STATE ELECTION COMMISSIONER office, click the "File All to State" button. This will navigate you to the Cash Balances" screen that shows the filing period your transactions are in and has the following required fields:
  - Prior Reported Ending Balance(the balance at the beginning of the reporting period)
  - Reported Ending Balance (the balance at the end of the reporting period)

- To complete your filing, populate the Password field in the Authorization box and check the "I certify…" checkbox and click "Submit." Your transactions will then be filed to the State and a dialogue box will be displayed to this effect.
  Note:*Only a Candidate or a Treasure can file the amended Campaign Statement by providing their passwords and approval. For a Candidate Committee, the candidate password is required to file the amended campaign statement.*
- To reset the fields, click "Clear". This will clear all of the fields.
- To cancel the filing and return to your search results, before you have clicked "Submit", click "Cancel" in the dialogue box. Your transactions will not be filed to the State, and you will be returned to your search results.
- After your transactions have been filed to the STATE ELECTION COMMISSIONER office, the appropriate report will be generated.
- To view or print the report, click on the "View/Print" link. This will open a dialogue box that gives you the option to "Open," "Save," or "Cancel."
- If you click "Open", the report will open on as a separate PDF document. You are able to view, save and print this document as you can any other.
- If you click "Save", the "Save As" box will open and you are then able to save the document, without viewing it first, to your computer or to an external drive or disk just as you are able to do with any other file.
- To close the Open/Save/Cancel dialogue box, click the "Cancel" button. This will close the current dialogue box and return you to the dialogue box that lists the report that was generated.
  Note: *After successful notification and filing to the STATE ELECTION COMMISSIONER office of transactions, an email will be sent to your committee from the system communicating to you that your campaign statement was successfully filed with the STATE ELECTION COMMISSIONER office. Your filed campaign statements are viewable by the public in PDF format. This is done by selecting "View Filed Reports" from the public menu.*

16.7 Delete Transactions

- To delete a transaction, click the box under the column heading "Select" for the file you want to delete.
- You are allowed to delete any, or all, of the transactions you have amended or added.
- After you have checked the "Select" box for all of the transactions you want to delete, click the "Delete" button at the bottom of the page. This will delete the selected transactions from the system.

16.8 Return to Main Menu

- To exit the "Amend Transactions" screen and return to the Committee Main Menu, click the "Cancel" button.

17.0 Upload Transactions

This screen allows a Committee to upload their transactions into the system.

Figure 17.0: Upload Transactions

- After you have logged in as a Committee, click the "Upload Transactions" link on the main menu. This will navigate you to the Upload Transactions screen.
- Microsoft Excel files (2003 and Earlier) or (2007 and Later)are allowed to be uploaded. The desired templates are available on the screen and can be downloaded to import all of your transactions into these templates and upload them into the system.

17.1 Upload Transactions

- To manually create an Excel spreadsheet for recording transactions such as Contributions and Expenditures, use this method.
- Excel templates are available to be downloaded for Contributions and Expenditures. The links to download them are in brown letters at the top of the Upload Transactions screen in the section labeled "Download Templates."
- To download a template, click on desired version of Microsoft Excel ("2003 and earlier" or "2007 and later") of "Contributions," or "Expenditures" link in the "Download Templates" section. This will open a File Download dialogue box that allows you to open the Excel template or save it directly to an available location.
- To open the Excel template, click the "Open" button in this dialogue box. This will open the template as a separate screen and allow you to edit and save it. Note that if you open the template directly, you must save it before you can upload it to the system.

- To save the template directly from this dialogue box, click the "Save" button in this dialogue box. This will open the "Save As" box and allow you to save the template to any available location.
- After you have saved a template, you are able to upload it to the system by following the below steps.

- To upload an Excel file that is saved, click on the "Choose a File" button, next to the "Select a File" field, on the far right-hand side of the Upload File section. This will open a "Choose File" box from which you are able to locate the saved Excel file.
- From this "Choose File" box, locate the saved Excel file you want to upload and either double-click on it or click on it once and then click "Open." This will result in the file location being populated into the "Select a File" field.
- Before you can upload a file, a value must be selected from the Filing Period Name drop-down menu and from the Transaction Type drop-down menu. These values must agree with the information on the Excel file you are attempting to upload. This can be done at any point before you click the "Upload" button. After you have populated both of these fields, and you have selected an Excel file to upload and that file location appears in the "Select a File" field, click the "Upload" button.
- A successful upload will result in a message stating, "File Uploaded Successfully," and the file appearing in the "Upload Status" section with a Status of "Uploaded."
- If the file was not uploaded successfully, a message stating, "Invalid Template: XXX," with a description of the error where the three X's appear, will be displayed. The file will not appear in the "Upload Status" section if it was not successfully uploaded.
- These, 'Invalid Template', errors result from a problem with the overall file itself not from errors with data in the file. An example of this type of error is attempting to upload a 'Contributions' template when the Transaction Type selected is 'Expenditures'. Another common mistake is not having the correct column headings in the file you are attempting to upload. If these errors occur, you must go back to the ORIGINAL file to make changes (see Note at the beginning of this section).
- After a file has been successfully uploaded, it will be checked for errors. To see the status of the file, click the "Check Status" button. This will result in the Status of this file changing to either "Processed – No Errors," in green lettering, or to "Processed – With Errors," in red lettering. You are allowed to upload any number of files before you click "Check Status." This way you can check the statuses of multiple uploads at once instead of checking them one at a time.
- If, after clicking "Check Status," the file you uploaded has a Status of "Processed – No Errors," in green lettering, the file is okay. You do not need to make any changes to it.
- If, after clicking "Check Status," the file you uploaded has a Status of "Processed – Errors," in red lettering, there are errors on the uploaded file that need to be corrected. These kinds of errors result from incorrect data IN the file, not from the file itself. Examples of this kind of error are "Invalid Contribution Date" or "Invalid Contribution Type."
- To see what errors need to be corrected, click on the File Name of the uploaded file that contains the errors. This is in blue lettering in the Upload Status section. Clicking on this will result in a File Download prompt. Click "Open" in this prompt to open the Excel document. Column W, "Errors," lists the errors that caused the system to label it with a Status of "Processed – Errors."

Note: After correcting the transactions with errors, only upload the transactions that have been corrected. DO NOT upload the transactions that were uploaded successfully earlier or else duplicate records will be created in the "Edit/File Pending Transactions" screen.

- The goal in uploading a transaction is to have a successful upload and for this upload be labeled with a Status of "Processed – No Errors." Errors need to be checked and corrected until this is achieved.

17.2 OtherDocuments

- There are two additional Excel documents that are provided for you on the Upload Transactions screen. There is a link to each of them in brown lettering near the bottom of the page.
- To use one of these templates, click on the link of the template you want. This will open a File Download box from which you can open or save the file.
- To open the template directly, click "Open" in the File Download box. If you choose to open the template this way, be sure to save the file before closing it or it will be lost.
- To save the template without opening it, click "Save" in the File Download box. This will open a Save As box and allow you to save the file to any available location.
- To exit the File Download box without opening or saving a template, click "Cancel."

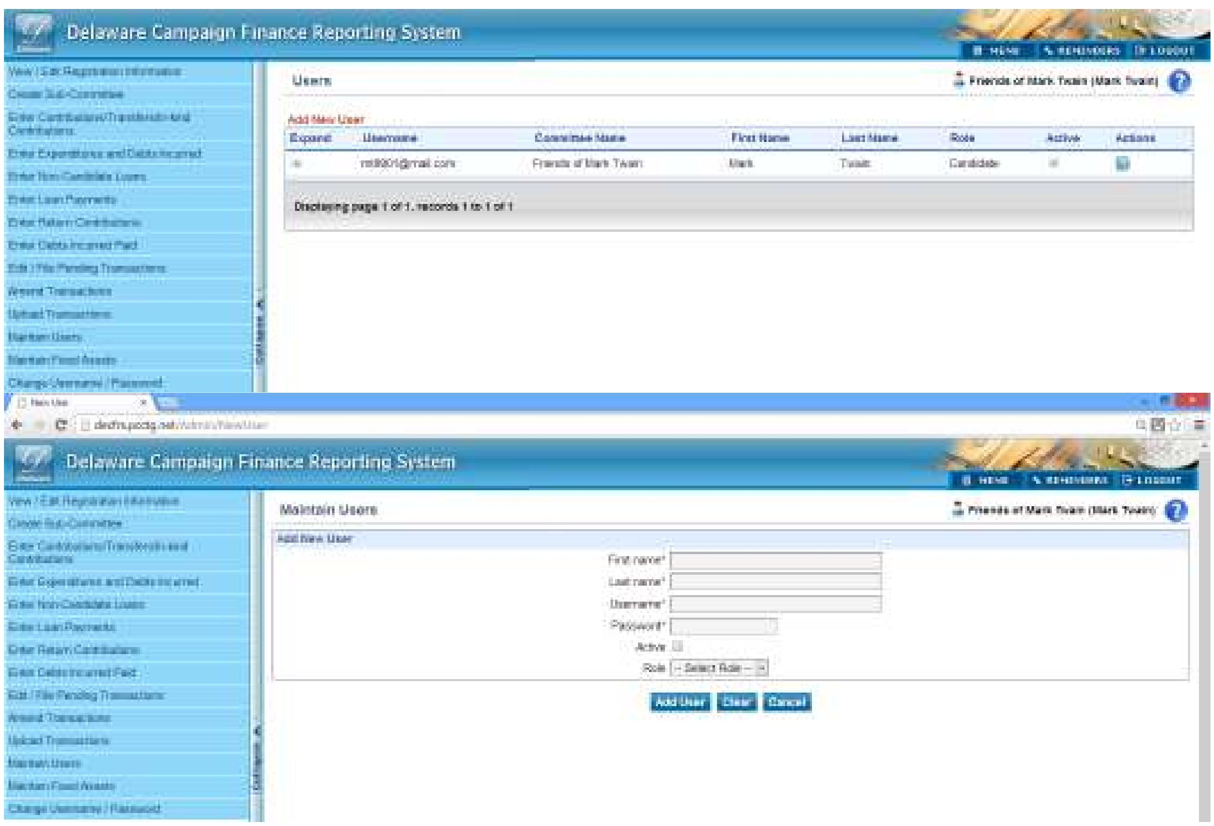
17.3 Clear button

- To reset the fields in the "Upload File" section, click the "Clear" button.

18.0 Maintain Users

These screens allows a Committee to add new users, update details of existing users, assign roles to both new and existing users and add or update the roles of existing users.

Figure 18.0: Maintain Users



- After you have logged in as a Committee, click the "Maintain Users" link on the main menu. This will redirect you to the Maintain Users screen.

16.1 Edit Existing User's Information

- Select the "Maintain Users" link from the Committee main menu.
- This will navigate you to a screen on which all existing users that this Committee has are listed.
- To edit an existing user's information, click the (edit) icon that is on the line of the user. This will display the fields and check boxes for that user that were filled in when adding the user (those fields that were discussed in the above section).
- Make the desired changes and click the "Update User" button when finished. This will save the changes for that user in the system.

- If you decide to cancel the changes you are making, before you have saved them to the system, click the “Cancel” button. This will close the fields for editing and display just the initial single line of user information.

16.2 Deletean Existing User

- Select the “Maintain Users” link from the Committee main menu. This will navigate you to a screen on which all existing users that this Committeehas are listed.
- From this list, select the user you want to delete by clicking the“+”(plus sign) next to the Username. This will display the list of roles assigned to that user underneath the user information that is already displayed.
- To delete, click the (delete) icon that is on the line containing the role. A dialogue box will be displayed that asks, “Are you sure you want to delete the selected record?” Click “OK.” (If you change your mind and do not want to delete the role at this point, click “Cancel.”)
- System will delete the selected user from the committee users list.

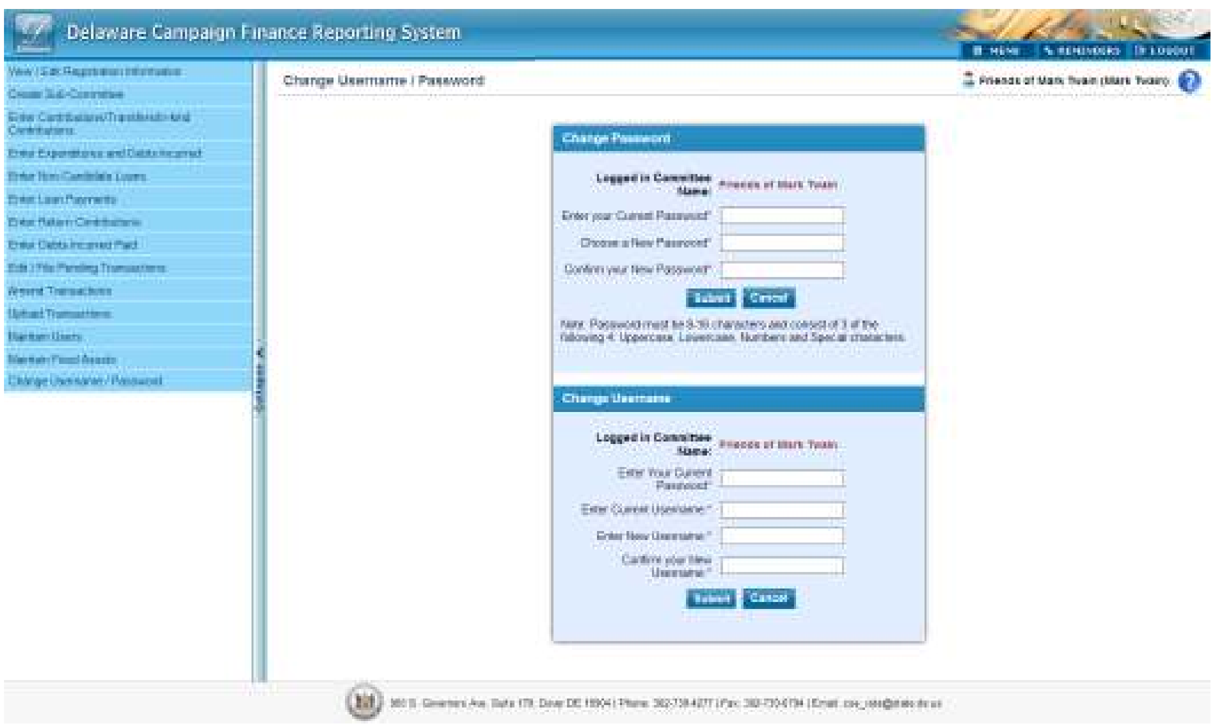
16.3 Add New User

- Select the “Maintain Users” link from the Committee main menu. This will navigate you to a screen on which all existing users that this Committeehas are listed.
- To add a new user, click the blue link “Add New User” near the top of the screen. This will open the fields necessary to add a new user.
- The four fields are required but the checkbox “Active” is optional.
- If you want the new user to be active, that is, if you want the new user to be able to perform the roles you assign to them, you should select the “Active” check box. Checking this box will activate the user and allow it to perform the roles you assigned to them.
- After you have populated the required fields and checked the desired boxes, click the “Add User”button. If the information you entered in the fields meets the requirements listed above, the user will be added to the system and you will receive a dialogue box that states, “User information inserted successfully.” Click “OK.” If the information you entered into the fields is not accepted by the system, you will receive a dialogue box explaining the error, the fields and check boxes will be reset and the new user will not be added to the system.
- If you choose not to add a new user, click the “Cancel”button. This will close the fields for adding a new user from the screen.
- After you have added a new user, the user will not have any roles assigned to it until you follow the steps listed above to add a role(s) to the user.

19.0 Change Username/Password

This screen allows a Committee to change the username and password that are used to login to the Committee section of the system.

Figure 19.0: Change Username/Password



- After you have logged in as a valid user, click the "Change Username/Password" link on the main menu. This will navigate you to the "Change Username/Password" screen.
- The screen will now display your Committee Name and show the required open fields.
- After you have populated the required fields, and your new username/password meets the requirements below, click the "Submit" button.
- If your new username/password is accepted, you will receive a dialogue box that states, "You have successfully chosen a new username/password."
- If your new username/password is not accepted, a dialogue box will be displayed that states the reason why the username/password were not changed. Click "OK" in this dialogue box, and enter a new username/password that meets the requirements listed below.
- To leave the Change Username/Password screen and return to the main menu, click the "Cancel" button. If this is done before a new username/password have been both submitted and accepted, your username/password has not been changed.

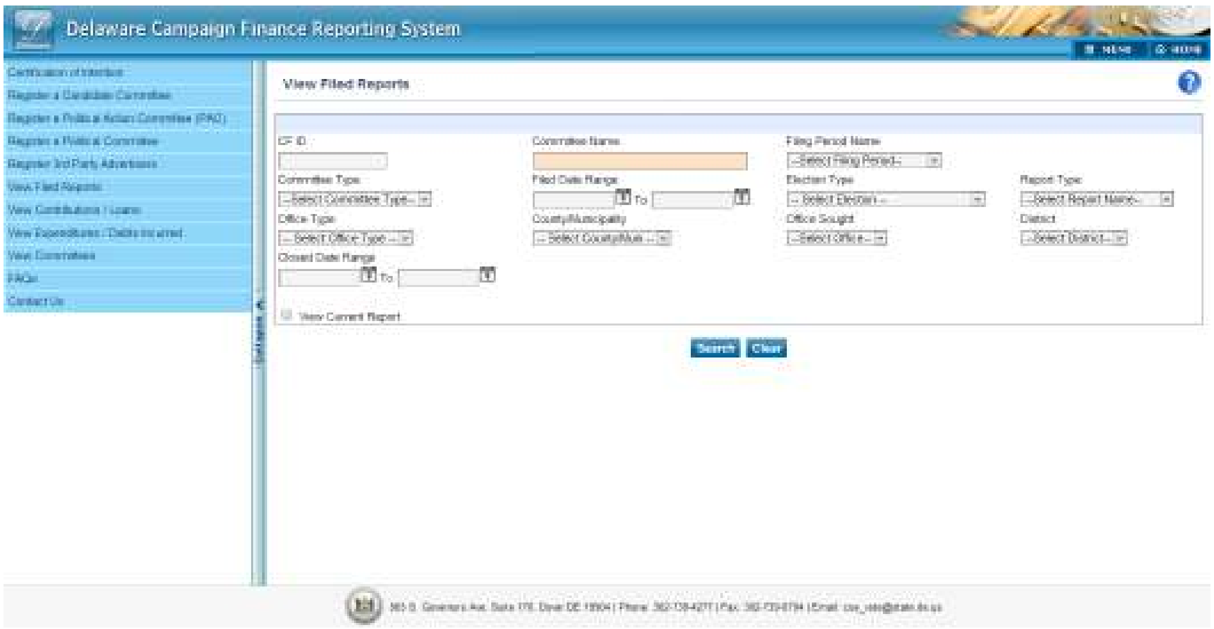
19.1 Password Requirements

- Passwords are case sensitive. This means an upper case letter MUST be capitalized and a lower case letter MUST be lower case in order for the password to be accepted.
- Passwords must have at least 6 characters but not more than 10 characters.
- At least three of the following four character types must be included in your password:
  - Lower Case
  - Upper Case
  - Number
  - Special Character (e.g., a symbol or punctuation mark such as $, #, @, etc.)

20.0 View Filed Reports

The screen allows a Committee to view their filed reports.

Figure 20.0: View Filed Reports



- Click the "View Filed Reports" link on the CFRS home page. This will redirect you to the View Filed Reports screen.

17.1 Search fora Filed Report

- After you have populated the required fields, click "Search." The results of the search will include only those that match the criteria you entered into the search fields. It is possible that you will get no resultsbecause the search criteria did not match any filed reports.
- The search results will be displayed in a grid.
- All search results are viewable and can be exported as PDF documents. To view a search result as a PDF document, click on the blue link in column labeled "Filing Method". This will open the report as a separate PDF document. You are able to save this PDF document.
- To search again, repopulate the search fields with new values and click "Search." To reset all search fields click "Clear."
- The results of your search can be exported as a PDF, Microsoft Word, Microsoft Excel and/or Microsoft Excel Comma Separated Values document.
- To export your search results as a PDF, click the  icon.

- To exportyour search results as a Microsoft Word document, click the icon.
- To exportyour search results as a Microsoft Excel document, click the icon.
- To exportyour search results as a Microsoft Excel Comma Separated Values document, click the icon.
- Clicking any of the four icons above will open a dialogue box that gives you the option to open the document for viewing and/or saving or the option to save the document directly to your computer or external device.
- To open the document, click the "Open" button. This will open the search results as a separate document in the format that you selected. This document can be saved just as any other document.
- To save the document without opening it, click the "Save" icon. This will open the "Save As" dialogue box and allow you to save the document directly to your computer or external device.
- If you choose not to view or save the document, click "Cancel" in the dialogue box. This will close the dialogue box and return you to the search results screen.