

**NEW YORK STATE
BOARD OF ELECTIONS**



**ELECTRONIC FILING SOFTWARE
USER GUIDE**

UPDATED APRIL 2011

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INTRODUCTION

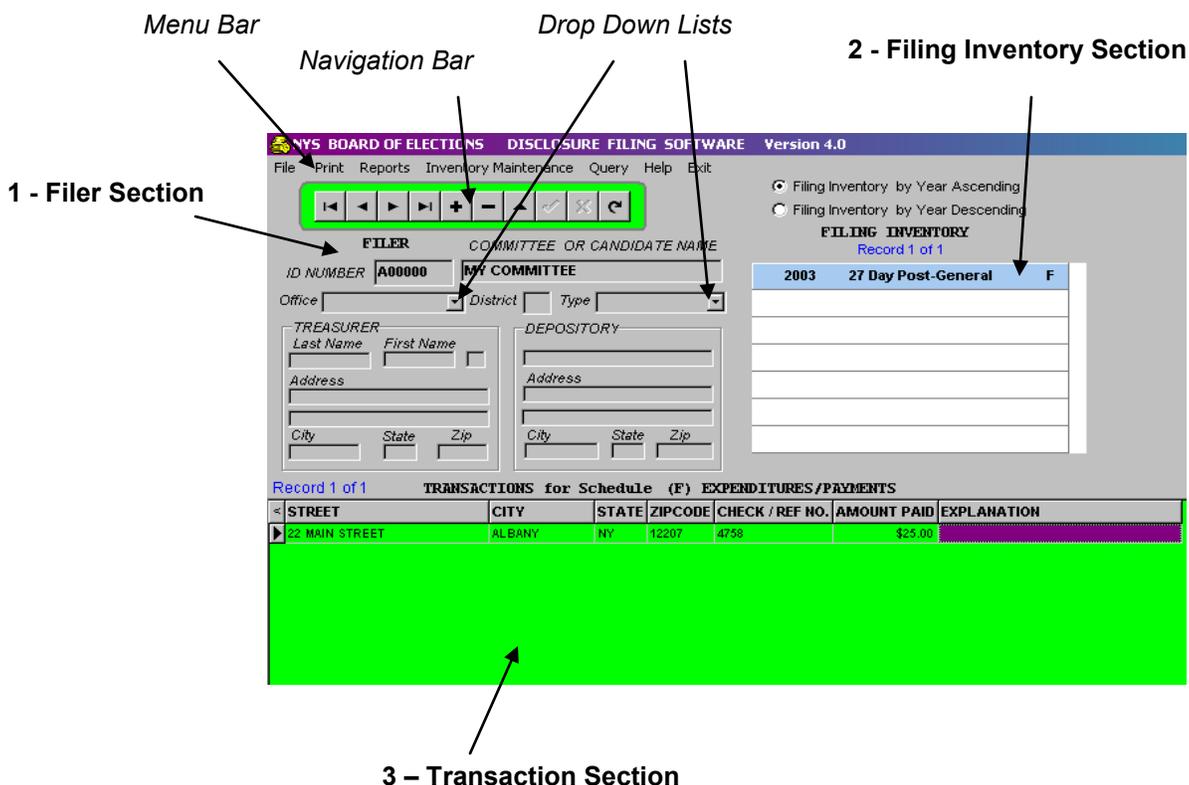
Welcome to the New York State Board of Elections' Electronic Filing System for Campaign Financial Disclosure. The Electronic Filing System (EFS) is a database application that enables filers to enter and maintain data relevant to New York State Campaign Financial Disclosure. The Disclosure Statements or Filings are then sent to the Board of Elections in electronic format. The data or transactions entered become permanent records in each filer's EFS database tables as well as the Board of Elections' database. Filers can query their database tables to produce various reports for their own use.

There are three (3) main sections which comprise the Electronic Filing System.

- 1) Filer Section
- 2) Filing Inventory Section
- 3) Transaction Section

These three sections of the Electronic Filing System (EFS) correspond directly to requirements for completing financial disclosure reports described in the *New York State Board of Elections Handbook of Instructions for Campaign Financial Disclosure*.

In addition, there is a Menu Bar, a Navigation Bar, as well as, Drop-Down Lists to aid in the manipulation of the form and the data. These tools assist you in filing disclosure statements, printing reports, creating and deleting records, and selecting items from lists.



STARTING A SESSION

IMPORTANT:

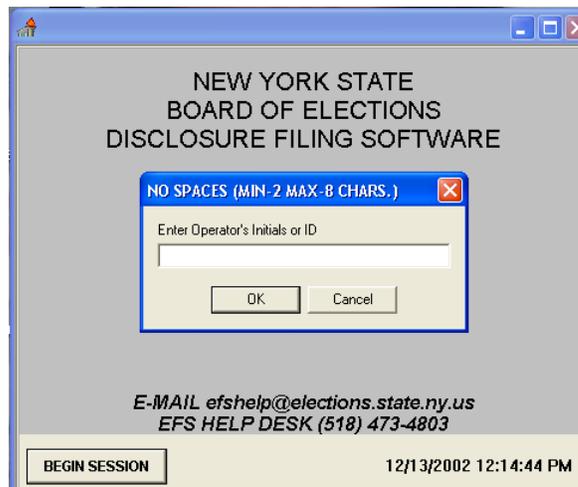
Operator's Initials must be a minimum of 2 characters and a maximum of 8 characters.

NOTE:

The **Operator's Initials** allows you to track who has entered or edited transactions.

TO START A SESSION:

- 1) Open your EFS Software
- 2) Click on **BEGIN SESSION** on the bottom left of your screen
- 3) Enter your initials or operator id and click **OK**



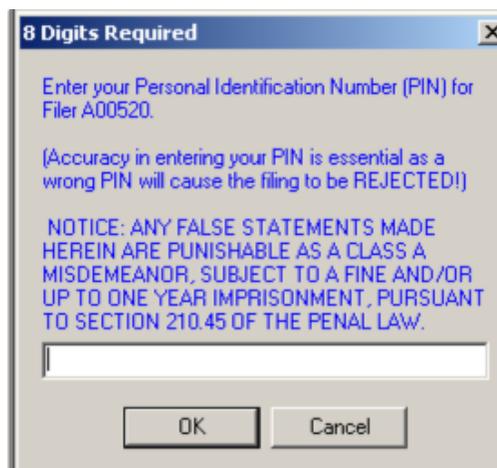
- 4) If you have already entered and posted your filer **Id Number**, enter your eight digit **Personal Identification Number (PIN)** that was assigned to you by the NYS Board of Elections and click **OK**. If not, follow steps 1-8 (To Complete the Filer Section) on page 3.

IMPORTANT:

Your **PIN** number is a required number that replaces the verification statement. An incorrect **PIN** will cause a filing to be rejected.

NOTE:

EFS will ask you for the **PIN** number when the filer id information has been posted or when you have selected a different committee. It is only required to be entered once per session per committee.



FILER SECTION

IMPORTANT:

Some information in other sections of this form are dependent on the information entered in the **Filer Section**.

The screenshot shows a form titled "FILER" with a sub-header "COMMITTEE OR CANDIDATE NAME". The form contains the following fields:

- ID NUMBER: A text input field.
- COMMITTEE OR CANDIDATE NAME: A text input field.
- Office: A dropdown menu.
- District: A text input field.
- Type: A dropdown menu.
- TREASURER section:
 - Last: A text input field.
 - First: A text input field.
 - Address: A text input field.
 - City: A text input field.
 - State: A text input field.
 - Zip: A text input field.
- DEPOSITORY section:
 - Address: A text input field.
 - City: A text input field.
 - State: A text input field.
 - Zip: A text input field.

To Complete the Filer Section:

- 1) Enter your six (6) character (**A** for State filers, **C** for County filers followed by 5 digits) Filer **Id Number** assigned to you by the NYS Board of Elections and tab to the next field.
- 2) Enter the **Committee Name** or the **Candidate Name** that corresponds to the filer id and tab to the next field.
- 3) Click on the down-arrow button in the **Office** field to show a list of choices, select the office and tab to the next field.
- 4) Enter the **District** and tab to the next field.
- 5) Click on the down-arrow button in the **Type** field to show a list of choices, select the committee type and tab to the next field.
- 6) Enter the **Treasurer** information and tab to the next field.
- 7) Enter the **Depository** information and click on the **Post Edit** button  to save your filer information.
- 8) Enter the **Pin Number** and click **OK**.

NOTE:

To fill in the field, put your cursor in the beginning of the field.

NOTE:

The **Filer Section** only needs to be completed one time.

NOTE:

The **Filer ID** number starts with an "A" for State filers or a "C" for County filers followed by five (5) numbers.

Multiple Committees

- To add a new committee:
 - 1) Click on the **New Record** button (+) and enter the new Filer ID number. 
 - 2) Click on the **Post Edit** button  to save.
 - 3) Enter the new **Pin Number** for the **New Committee**.
- To access a different committee:
 - 1) Double click on the **Filer ID** number, a drop-down list will appear. Click on the **Filer ID** number you want to access.
 - 2) Enter the **Pin Number** for that Filer ID number.

NOTE:

If you can not see the **Filer ID** you are looking for, use the scroll bar on the side of the drop-down list.

FILING INVENTORY SECTION

IMPORTANT:

Only create the schedules you need to file.

NOTE:

You can sort by **Ascending** or **Descending** by clicking on the circle to the left of your choices.

TROUBLESHOOTING:

If you receive a **master record missing** error message, it means you did not click on the post edit button after entering the filer information.

IMPORTANT:

You must click on the **Post Edit** button (✓) after each schedule you want to create.

TROUBLESHOOTING:

If you receive a **key violation** error message, it means the filing year, period and schedule you are trying to create already exist.

NOTE:

You can create all the schedules you need at once or one at a time.

In this section, you will create the specific filing periods and schedules which you are required to file.

FILING INVENTORY		
Record 1 of 2		
2003	27 Day Post-General	F
2004	January Periodic	A

To add periods and schedules:

- 1) Select **Inventory Maintenance** from your menu bar and click on **Add Periods/Schedules**.



- 2) Once the **Filing Inventory Maintenance** box appears click on the down-arrow button in the **Filing Year** field to show a list of choices, select a year and tab to the **Filing Period** field.

INVENTORY MAINTENANCE

File Print Reports **Inventory Maintenance** Query Exit Help

Add Periods/Schedules

Filing Year: 2004 Filing Period: January Periodic Schedule: A

After Filling in Schedule, Click Checkmark to Post.
After Posting the Schedule(s), Click on Exit to begin Data Entry

- 3) Click on the down-arrow button in the **Filing Period** field to show a list of choices, select a period and tab to the **Schedule** field.
- 4) Click on the down-arrow button in the Schedule field to show a list of choices, select a schedule and click on the **Post Edit** button (✓) on your navigation bar to save.
- 5) Click on the **Exit** button to leave Inventory Maintenance.

TRANSACTION SECTION

NOTE:

Schedules A-E have note fields which are available for any additional notations. The note fields accept 36 characters and are in the same location as the explanation fields in other schedules.

In this section, you will enter the data for the various filing period/schedules you have created in the Filing Inventory Section.

Record 1 of 8 TRANSACTIONS for Schedule (A) INDIVIDUAL/PARTNERSHIPS						
DATE RECEIVED	CODE *	FIRST NAME	MI	LAST NAME		STREET
12/07/2001	CAN	HAROLD		BELL		568 MAIN STREET
12/05/2001	FAM	STEVEN		BELL		4248 MAPLE AVE
12/06/2001	FAM	WAYNE		BELL		169 NORTH SHORE RD
12/03/2001	FAM	GERALDINE		BELL		123 SOUTH ST
12/05/2001	IND	BARRY		JONES		118 PROSPECT ST
11/30/2001	IND	MARY ALICE		WILSON		82 GLEBE RD
12/04/2001	PART			BENTLEY AND BENTLEY		912 SOUTH WILLIAM ST.
12/01/2001	UNIT			UNITEMIZED		

TROUBLE SHOOTING:

If you do not see an asterisk, click on the year, period and schedule in the **Filing Inventory Section**, then click on the **Insert Record** button (+) on your navigation bar.

NOTE:

Check that the name in the title bar of the **Transaction Section** matches the schedule you are completing.

IMPORTANT:

If you enter under the wrong schedule you may have to re-enter all the transactions into the correct schedule.

NOTE:

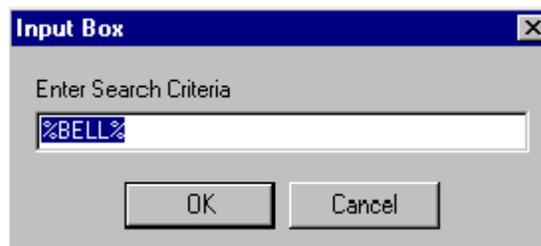
If you want to bring up a list of all the names from previous transactions, keep the two percent signs in the **Input Box** and click **OK**.

To enter transactions:

- 1) In the **Filing Inventory Section** double click on the year, period and schedule you want to enter transactions for.
- 2) You should now see an **asterisk (*)** next to the date field which indicates that you can start entering transactions.
- 3) Enter the date or double click on the **Date** field to show the **Date Selection Calendar**. Double click on the date you need and the date will be placed in the date field. Tab to the next field.



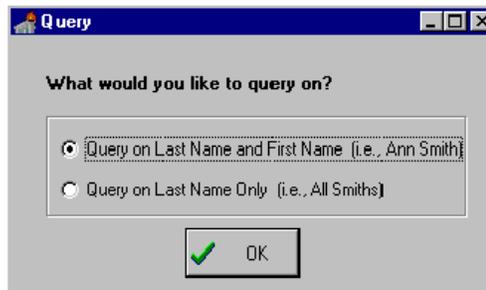
- 4) When you get to any **Name** field (Last Name, Corporation, Payee, Receipt Source, etc.), you can either type in the name or double click on the field to search for a name from a previous transaction, as described below in steps 5 - 7.
- 5) Enter the name you are looking for in the **Input Box**. If you are not sure of the exact spelling, you can enter wildcards (%) at the beginning and end of the letters you do know and it will bring up everything with those letters.



- 6) Select **Query on Last Name and First Name** if you want the result to be exactly the name you entered in the **Input Box** or select **Query on Last Name Only** if you want a list of names that contains the name you entered in the **Input Box** then click **OK**.

NOTE:

The names that are listed in the **List of Names** box are from previous transactions that you have entered for that particular schedule.



- 7) When the list of names pops up, double click on the name and the name will be placed in the **Name** field. If the name you are looking for does not appear, press the space bar on your keyboard to exit the **List of Names**.

NOTE:

You can use the **List of Names** to show how many times and what amounts a individual partnership or corporation has contributed, as well as, what you have paid to an individual, partnership or corporation.

LAST NAME	FIRST NAME	M/ DATE	AMOUNT	ADDR	CITY
BELL	GERALDINE	12/3/2001	\$1,000.00	123 SOUTH ST	SCHENECTADY
BELL	HAROLD	12/7/2001	\$100.00	566 MAIN STREET	TROY
BELL	STEVEN	12/5/2001	\$500.00	4248 MAPLE AVE	ALBANY
BELL	WAYNE	12/6/2001	\$300.00	169 NORTH SHORE RD	COLONIE
JONES	BARRY	12/6/2001	\$50.00	118 PROSPECT ST	ALBANY
SMITH	NICHOLAS	12/6/2001	\$250.00	104 CLINTON ST	FONDA
WILSON	MARY ALICE	11/30/2001	\$400.00	82 GLEBE RD	AMSTERDAM

NOTE:

The **yellow total field** shows you how much the person you queried on has contributed.

When you are finished entering the last field of the transaction, you can either tab to the next line if you have more transactions to enter, which will automatically save the previous transaction, or click on the **Post Edit** button to save the transaction.

TROUBLESHOOTING:

If you receive a **master record missing** error message, it means you did not click the **post edit** button (✓) after creating your filing year, period and schedule or you still have the **Inventory Maintenance** box open.

No Transactions to Report

- Electronic filers who have no transactions for the reporting period can either file online by visiting our website (www.elections.state.ny.us), clicking on Campaign Finance, then clicking on File Disclosure Reports and filling out the No-Activity Report or by completing and mailing a Termination or Resignation Request Form/No-Activity Report Form (CF-18) with the “No-Activity” box checked.

MISCELLANEOUS ENTRIES

Unitemized Entries:

- For **Schedules A, D and P**, double click in the code field and select **UNIT** from the list . Then enter the unitemized totals in the **Amount** field.
- For **Schedules B and C**, enter “UNITEMIZED” in the **Corporate/ Name** field. Then enter the unitemized totals in the **Amount** field.
- For **Schedule O**, enter “UNITEMIZED” in the **Partnership Name** field. Then enter the unitemized totals in the **Contribution** field.
- For **Schedules E, F and Q**, double click in the **Code/Purpose Code** field and select **OTHER** from the list. Then enter “UNITEMIZED” in the **Receipt Source\PayeeName** field and enter the total unitemized receipts or expenditures in the **Amount/ Amount Paid** field.

Credit Card Payment Entries:

- Enter the bank name with all the information plus the amount in full in the appropriate fields.
- On the subsequent lines, list the vendor names and addresses, but omit the amount and add an “R” to the check number (e.g., 1248R) as a reference to the previous line.
- In the **Explanation** field, write “memo” and the amount paid to the vendor (e.g., memo: \$240). All memo amounts in the **Explanation** field should add up to the total in the **Amount Paid** field in the first line. See example below:

Date	Purpose	Payee	Street	City	State/Zip	Check/ Ref#	Amt Pd	Explanation
6/3/2002	other	A&B Bank	PO Box 10	NY	NY 10002	1248	\$600	
5/5/2002	petit	PrintIt	PO Box 76	NY	NY 10001	1248R		memo:\$240.00
5/9/2002	radio	WNEW	1 Main St.	NY	NY 10003	1248R		memo:\$220.00
6/3/2002	other	Unitemized				1248R		memo:\$140.00

Two Contributor Name Entries:

- In **Schedule A**, if you have two names for a single name field (e.g., Jerry and Terry Jones), enter the first named listed with all the information plus the amount in full.
- On the next line add the second name, but omit the amount and add an “R” to the check number (e.g., 1248R) as a reference to the previous line.

Date	Code	Name	Street	City	State/Zip	Check/Ref#	Amt Pd	Explanation
6/3/2001	Ind	Jerry Jones	PO Box 25	NY	NY 10001	1248	\$600	
6/3/2002	Ind	Terry Jones	PO Box 25	NY	NY 10001	1248R		

- If the names appear as Mr. and Mrs. Jerry Jones, enter the first name in the **Name** field and add the second name as a note in the **Explanation** field.

Date	Code	Name	Street	City	State/Zip	Check/Ref#	Amt Pd	Explanation
6/3/2002	Ind	Jerry Jones	PO Box 25	NY	NY 10001	1248	\$600	Mrs. Jones also contributor

Corporation Name Entries:

- The full name for corporations or committees should be used if possible.
- You can use standard abbreviations for long names but show as much of the name as possible.
- For **Schedule A**, if there is a corporation name listed, use the partnership code and make sure that the “Corp.,” “Ltd.,” or “Inc.” listed at the end of the name is visible in the **Name** field.

MAKING CHANGES

Navigation Bar

TROUBLESHOOTING:

If at any time you do not see the **Navigation Bar**, move the scroll bar on the far right, which runs the length of the page, all the way to the top of the page.

NOTE:

As a reminder of where you are in the form, the background color of the **Navigation Bar** will change to correspond to the background color of the section in which you are working.

NOTE:

When the I-beam is present, you can edit any of the fields in that particular record.

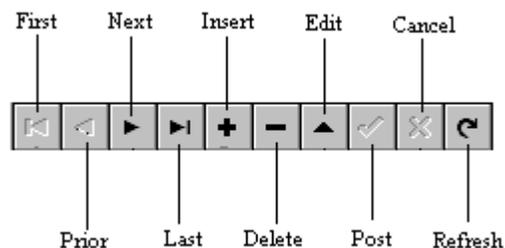
IMPORTANT:

If you make any changes to the **Filer Section**, you must click on the **Post Edit** button (✓) on your navigation bar to save the changes.

NOTE:

Before you can delete a specific filing year, period and schedule from the **Filing Inventory Section**, you must first delete all the records under that filing year, period and schedule.

The Navigation Bar contains the tools or buttons you need to manipulate the form and the data. If the buttons are in bold print they *are* available, if the buttons *are not* bolded they are unavailable.



Edit:

To correct a field or add more data after you leave the record:

- 1) Click on the field you need to edit.
- 2) Click on the **Edit Record** button  on your navigation bar.
- 3) The arrow  at the beginning of the record in the **Transaction Section** will turn into an I-beam (I).
- 4) Click on the field you need to edit again.
- 5) Use the **Backspace** key on your keyboard to clear the entire field or use the **Left-Arrow** key to move to an individual letter or number.
- 6) Make your changes and click on the **Post Edit** button  to save your changes. The I-beam (I) turns back into the arrow  telling you that your changes are saved.

Delete:

- To delete a blank line, press the **Esc** Key.
- To delete a record, click on the line to be deleted. Then click on the **Delete Record** button (–) on your navigation bar.
- To delete a filing year, period and schedule from your **Filing Inventory Section**, click on the year, period and schedule and then click on the **Delete Record** button (–) on your navigation bar.

Moving a Transaction to Another Filer ID Number, Filing Period or Schedule:

NOTE:

You may have to use the tab key or scroll bar to access all the fields in the transaction section.

CAUTION:

A red screen becomes visible as a reminder that you can lose data when performing a transaction move.

TROUBLESHOOTING:

If you receive an error message that says “Record already locked by this session”:

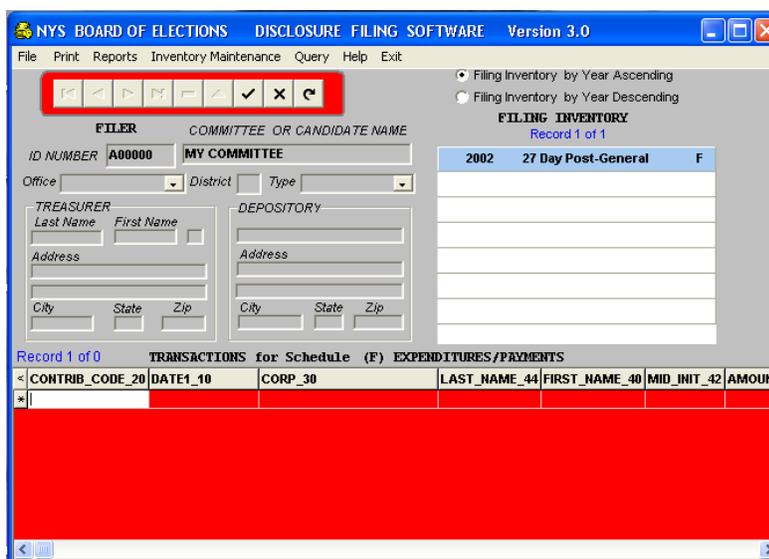
- click on the **OK** button
- exit the EFS software
- start a new session

The locked record is now available for changes.

TROUBLESHOOTING:

If you do not see an I-beam, click on the FREPORT_ID field and then click on the **Edit Record** button (▲) in the navigation bar.

- 1) Create the correct filer ID number, period and schedule by clicking on **Inventory Maintenance** on your menu bar. Then click on **Add Periods /Schedules**.
- 2) Select the incorrect filing year, period and schedule in the **Filing Inventory Section**.
- 3) Click on **Query** on your menu bar. Then click on **Group Query**.
- 4) The **Current Filing Period and Year for Current Schedule** option is selected by default. Click **OK** to see all the transactions for that schedule or enter the last name or company name to search for a specific transaction.
- 5) The **Transaction Section** will turn gray. Double click on the transaction you want to edit or move.
- 6) The **Transaction Section** will now turn red.
- 7) The I-beam (I) at the beginning of the record indicates that you are in edit mode.



To move the transaction from one filing period to another filing period:

- 8) Click in **FREPORT_ID** and change the existing letter to the correct letter. See *Appendix: EFS Data Elements (p. Appendix - 4)* for a list of filing periods and corresponding letters.

To change the filer ID:

- 8) Click in **FILER_ID** and change the existing filer ID to the correct filer ID.

To change the schedule:

- 8) Click in **TRANSACTION_CODE** and change the existing letter with the correct letter. *See Appendix: EFS Data Elements (Appendix-4) for a list of schedules and corresponding letters.*
- 9) Click on the “<” above the I-beam (I) at the beginning of the line to save the change and to get you to the next transaction.
- 10) The **Transaction Section** will turn gray again. Repeat steps 1-9 until all transactions are moved.
- 11) Click in the **Filer Section** or **Filing Inventory Section** to exit out of **Group Query**.
- 12) Click on the correct filing year, period and schedule to make sure the move was successful.

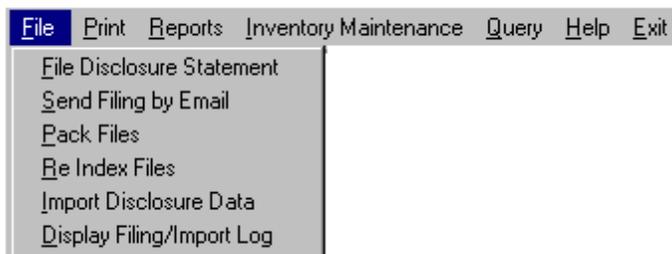
MENU BAR

The Menu Bar Contains Options Which Allow You To:

- File your electronic filing disclosure statement
- Print the screen
- View/print a full report or an individual schedule
- Create or add filing schedules
- Query the database tables
- Access the EFS Online User Guide and contact EFS help desk
- Exit the EFS software

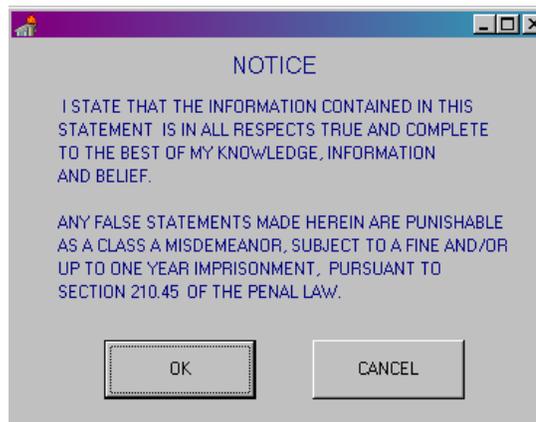
NOTE:

When you save your filing to a diskette or your hard drive, EFS will automatically copy *all* the schedules with that year and filing period.



To File Your Electronic Filing Disclosure Statement:

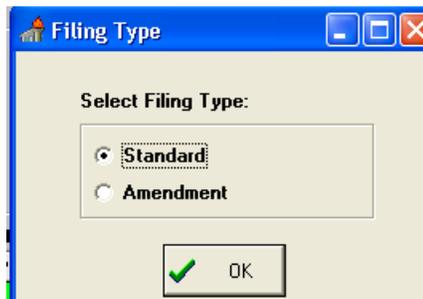
- 1) Click on any schedule for the filing year/period you need to file in the **Filing Inventory Section**.
- 2) Click on **File** on your menu bar. Then click on **File Disclosure Statement**.
- 3) Read the Legal Notice and click **OK**.



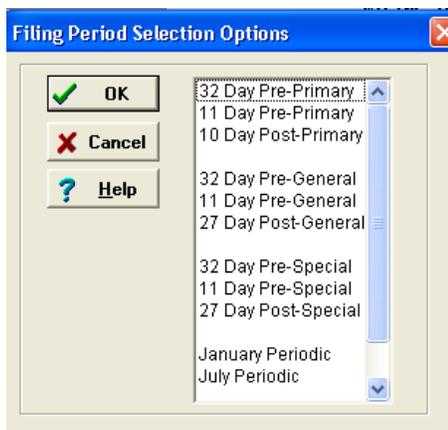
IMPORTANT:

If you select the wrong filing period, year, etc. the result will be a blank file.

4) Select **Standard** and click **OK**.



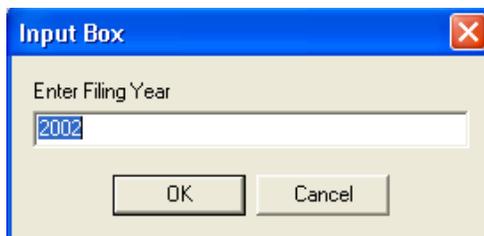
5) Select the **Filing Period** and click **OK**.



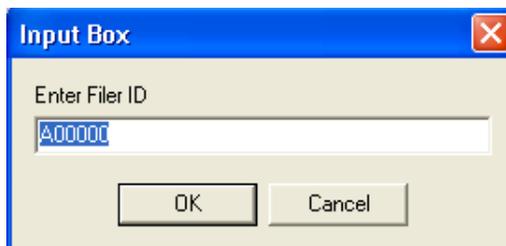
NOTE:

You can see the last import or export performed during the current session by clicking on the **File** and then **Display Filing/Report Log**.

6) If the default **Year** is correct, click **OK**.



7) If the **Filer ID** is correct, click **OK**.



- 7) Check the **File Name**. It should have your Filer ID Number, the last two digits of the year and the letter ending to match the filing period. See *Appendix –4: EFS Data Elements for a list of Filing Periods and corresponding letters*.

TROUBLESHOOTING:

If you see that zero records were exported or the file name and drive are wrong, go back to the main screen and repeat steps 1-8 making sure to select the correct filing year, period, etc.

NOTE:

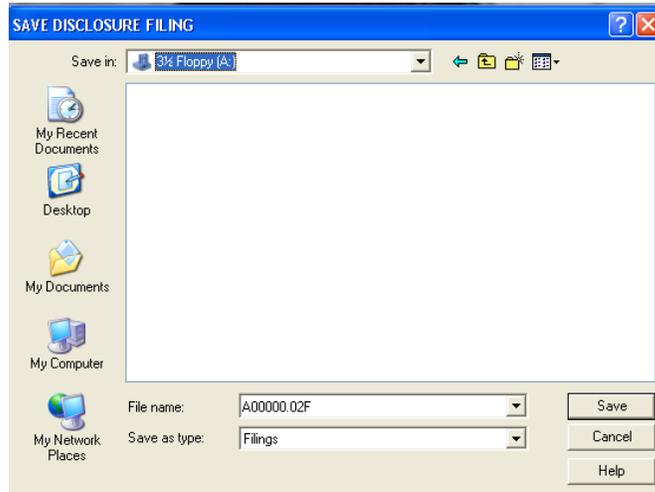
To verify that your filing has been received and loaded, you can visit our website at www.elections.state.ny.us and click on the Campaign Finance link then click on View Disclosure Reports.

TROUBLESHOOTING:

If your default email program does not open, you will need to start your email account, create new mail to efsfiling@elections.state.ny.us and attach your filing.

NOTE:

It is helpful if you label the diskette with your Filer ID number, the Filing Year and Period, and note that it is an **amendment**.



- 8) If the name is correct, choose where you want to save the filing: a disk for mailing or the hard drive for attaching to an email. Then click **Save**.
- 9) In the **Transaction Section** you will see a box showing how many records were exported and to where they were saved. The number exported should always be greater than zero.



- 10) Mail the disk to the NYS Board of Elections or send the statement via email by selecting **File** on your menu bar then **Send Statement by Email**. Make sure to attach the filing you just saved.

To File an Amendment:

- Make the changes to the filing you want to amend and follow the steps for filing your disclosure statement. Make sure to select **Amendment** under filing type (step 2).
- The software will generate a file with an A at the end of the file name.

e.g. A00000.02F.A

TROUBLESHOOTING:

If you see errors when viewing your report, you need to go back to the appropriate section of the form to make the changes.

NOTE:

The report is for your own records. It is not the official filing to be sent to the State Board of Elections. See page 12 for instructions on how to file your electronic filing disclosure statement.

NOTE:

There are only two accepted formats for importing into EFS: **Fixed Format** and **Delimited ASCII**. See *Appendix: EFS Data Elements (Appendix-6 and Appendix-7)* for the record layout for EFS disclosure transactions.

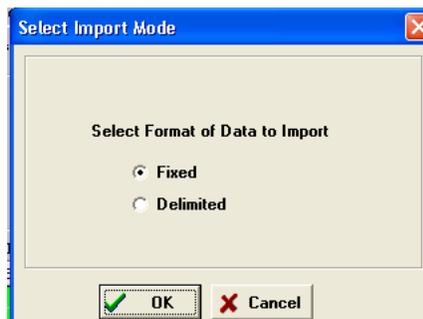
To View/Print a Report:

- 1) Click on **Reports** on your menu bar.
- 2) Click on either **Full Period Report** (all schedules) or **Individual Schedule**.
- 3) Enter the opening balance and click **OK**.
- 4) Use the zoom button at the top of the page to make your report larger.
- 5) To **Print**, click on the printer icon.

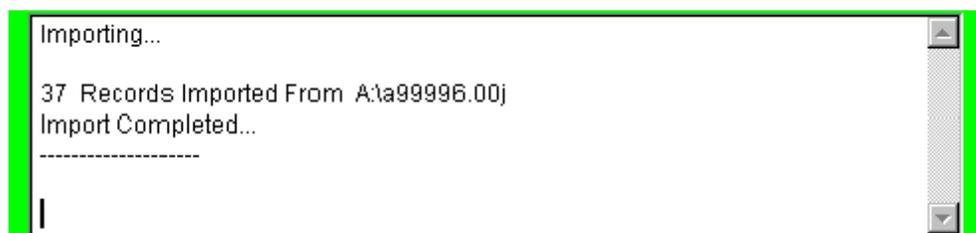
To Import Data Into EFS:

This feature is intended for importing files that were exported from the EFS software only.

- 1) Create the **Filing Year**, **Filing Period** and **Schedules** that you want to import into.
- 2) Click on **File** in the menu bar. Then click on **Import Disclosure Data**. *The data to be imported must be in the format described in Appendix: EFS Data Elements.*
- 3) Select the **Data Format** and click **OK**.



- 3) Click on the **Drive** where the file you want to import is saved, click on the **File Name** and click **Open**.
- 4) In the **Transaction Section**, you will see a box saying how many records were imported.



NOTE:

It is highly recommended that you backup your files with your operating system's backup utility on a regular basis.

NOTE:

The **Pack File** option should be run on a regular basis.

NOTE:

The **Re Index** option should be run after a considerable amount of activity (500 records added).

EFS Database Maintenance

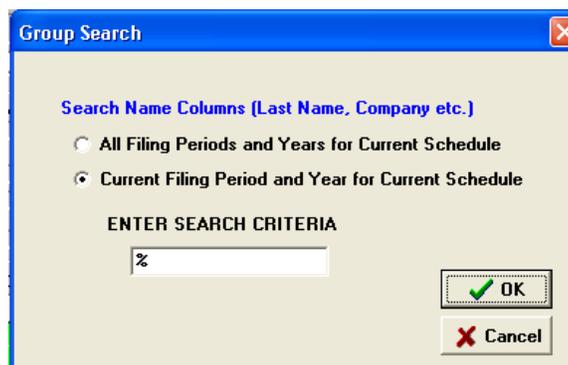
- Located under **File** on your menu bar you will find **Pack Files** and **Re Index** Files which will assist you in proper maintenance of your EFS Database.
- The **Pack File** option will rearrange your database files so free space made by numerous deletions and edits is used most efficiently. **Pack File** needs to be performed immediately preceding the **Re Index**.
- All databases need to keep Index files, which maintain your data in proper sorted order. These files are rather delicate, and tend to get corrupted due to external factors, like power fluctuations, disk drive problems, and so on, resulting in an improper ordering of the database. The **Re Index** option will rebuild the index structures for the database.

Group Query

Group Query allows you to search for a transaction by last name or company name from all the filings listed in your **Filing Inventory Section** for a specific schedule or the filing year, period and schedule that you have selected.

To Run a Group Query:

- 1) Click on **Query** on your menu bar, then click on **Group Query – Transactions by Last Name and Company**.
- 2) Select to either query on **All Filing Periods and Years for Current Schedule** or **Current Filing Period and Year for Current Schedule**.
- 3) Enter the last name or company name that you are searching for in the **Search Criteria** box and click **OK**.



NOTE:

Due to page size limitations, only a portion of the information that is available when running a group Query can be shown.

See Appendix: EFS Data Elements for a complete breakdown of the codes for the various fields.

NOTE:

If at any time you want to exit out of the **Group Query**, click in either the **Filer Section** or the **Filing Inventory Section**. Be aware that if you click on the **Filing Inventory Section**, you may inadvertently highlight a different schedule.

- 3) The search results will appear in the **Transaction Section**. The results will be highlighted yellow for **All Filing Periods and Years for Current Schedule** and gray for **Current Filing Period and Year for Current Schedule**.

FILER		COMMITTEE OR CANDIDATE NAME		FILING INVENTORY		
ID NUMBER	A99990	MY COMMITTEE		YEAR	DESCRIPTION	SCHED.
Office		District		1999	32 Day Pre-General	A
TREASURER		DEPOSITORY		1999	32 Day Pre-General	B
Last	First			1999	27 Day Post-General	A
Address		Address		1999	July Periodic	A
				1999	July Periodic	G
City	State	Zip		2000	January Periodic	A
				2000	July Periodic	A
				2000	July Periodic	F
TRANSACTIONS for Schedule (A) INDIVIDUAL/PARTNERSHIPS						
LAST_NAME_44	FIRST_NAME_40	MID_INIT_42	AMOUNT_70	FILER_ID	FREPORT_ID	TRANSACTION
BELL	HAROLD		1000	A99990	D	A
BELL	WAYNE		300	A99990	F	A
BELL	GWEN		250	A99990	J	A
BELL	HAROLD		400	A99990	K	A
BELL	GERALDINE	P	500	A99990	K	A

Single Record Query

Single Record Query allows you to search by name, date, amount, etc. from the corresponding transaction field in the filing year, period and schedule that you have highlighted in your **Filing Inventory Section**.

To Run a Single Record Query

- 1) Click on **Query** on your menu bar, then click on **Single Record Query - Transactions by any field**.
- 2) Select the field you want to query on at the bottom of the **Locate Value** box.
- 3) Enter the text you want to find at the top of the **Locate Value** box.
- 4) Click on **Find First**. If the results come up empty, repeat steps 1 and 2 and click on **Find Next**.
- 5) The software will point to  the result of your query in the **Transaction Section**.

NOTE:

Use the **Help** button for more information on Query's and other SQL Builder topics.

QUERYING THE DATABASE TABLES

This section can be used to:

- Build queries
- Add/remove tables from your query
- Open/save queries when querying the database tables
- Export table data or query results to a word processing application, spreadsheet, etc.

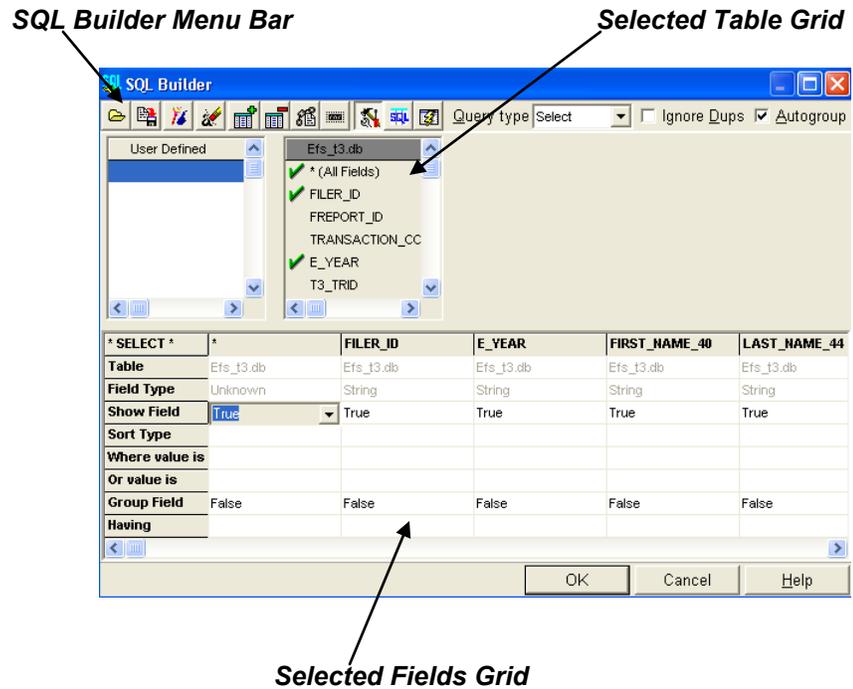


To Open Query Database Tables:

- Click on **Query** on your menu bar, then click on **Query Database Tables**. The **SQL Builder Screen** will appear.

NOTE:

Move your mouse over the buttons on the **SQL Builder Menu Bar** for brief descriptions of the buttons functions.



NOTE:

To query on your **Transaction Section**, select table **EFS_T3.DB**.

To Add a Table to a Query:

- Click on the **Insert Table** button  on your SQL Builder Menu Bar and select the table you want to add, then click **OK**.

To Add Fields to the Query:

- Double click on the field you want to add or click and drag the field to the **Selected Fields Grid**. A green check mark will appear, showing that the field is selected and a column for that field will appear in the Selected Fields Grid.



To Remove Fields from the Query:

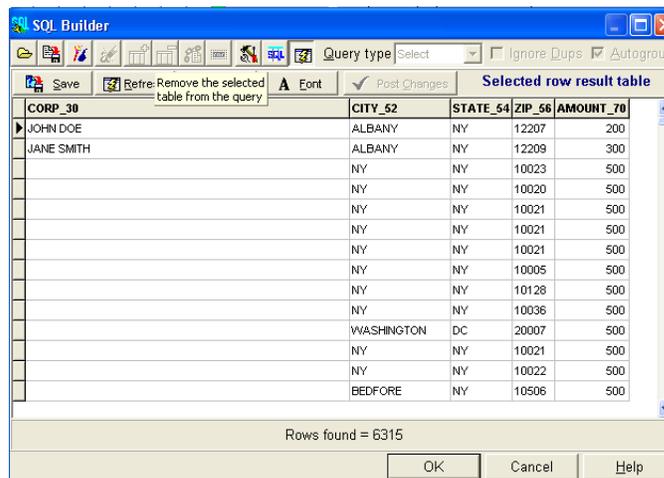
- Double click on the field you want to remove. The green check mark will go away.

To Run the Query:

- Click on the **Show Result Table** button  to run your query and show the result screen.

NOTE:

To get back to the SQL Builder screen, click on the **Show Query Builder** button.



The Selected Fields Grid

IMPORTANT:

Column order affects the sort. Columns are naturally sorted from left to right.

- Each column in the grid represents a field that is either user defined or has been selected from the available tables. The order of the columns determines the sort and grouping orders. You can change the order of the columns by clicking on the column you want to move and dragging it to the new location.

* SELECT *	EMP_NO	FIRST_NAME	LAST_NAME	TotalOrders
Table	EMPLOYEE	EMPLOYEE	EMPLOYEE	User Defined
Field Type	SmallInt	String	String	Currency
Show Field	True	True	True	True
Sort Type				
Where value is		...		
Or value is				
Group Field	True	True	True	False
Having				

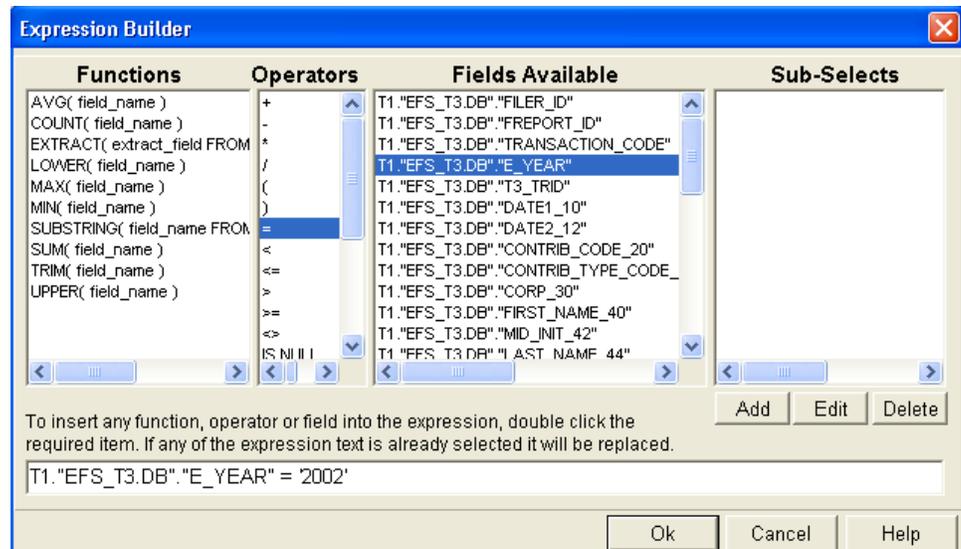
Expression Builder Button

Editing the Selected Fields Grid:

- The values in the first two rows (table and field name) cannot be edited.
- If grouping is used and this is not a grouped field, then the “Where value is” and “Or value is” rows are protected and “Having” is open. If it is a grouped field, then the reverse applies.
- To edit any of the other values, click on the cell containing the value you want to edit. If the possible values are true or false, then a drop-down list will appear. Select either **True** or **False**. In other cases, an edit box and **Expression Builder** button will appear. Click on the **Expression Builder** button to see the **Expression Builder** screen.

The Expression Builder

- The Expression Builder allows you to assemble fairly complex expressions simply by pointing and double clicking. Double clicking any function, operator or field, will add the item to the expression. If any part of the expression is selected, the selected portion will be replaced by the double-clicked item.



NOTE:

Use the **Help** button for more information on Query's and other SQL Builder topics.

Sub-Selects

- Sub-Selects are SQL queries that return a result set. TSQLBuilder allows you to build and test sub-selects visually and independently of the original query. The sub-select's result set may then be used in the criteria of a "Where" clause.

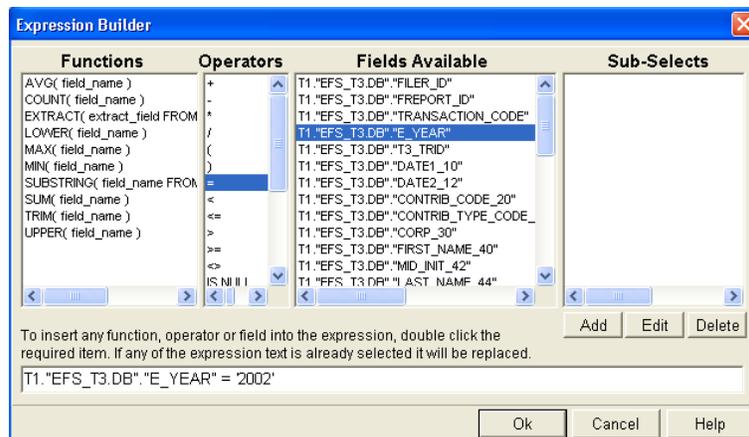
Example: Query for Election Year 2002

To query your database tables for only the election year 2002:

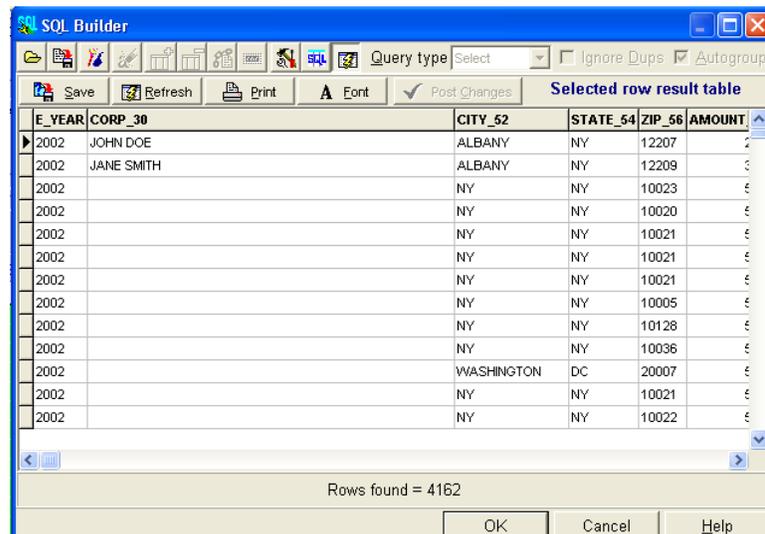
- 1) Click on the cell titled **Where value is** under the **E_YEAR** column. The **Expression Builder** button will appear. Click on it.



- 2) The **Expression Builder** box will open. Double click on **T1."EFS_T3.DB"."E_YEAR"** in the **Fields Available** list.
- 3) Double click on the = sign in the **Operators** list. Then type in '2002' and click the **OK** button.



- 4) Now you can run your query by clicking on the **Show Result Table** button.

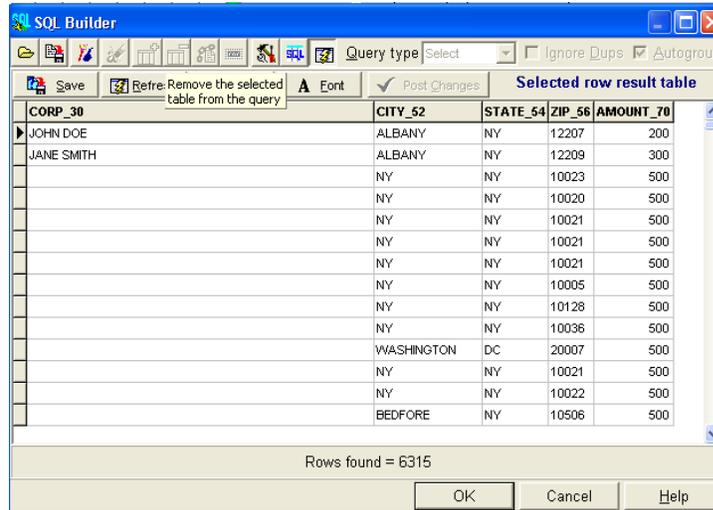


NOTE:

Modify your query in the **SQL Builder screen**. Any changes made in the Result Table will not be mirrored in the SQL Builder settings.

The Result Table

- The Result Table displays the actual SQL query text that corresponds to the settings you have selected in the SQL Builder screen. You can also save the result table to disk (local SQL only), post the changes to the database and print the result table as a customized report.



NOTE:

You will be warned if the report is too wide for the current page settings.

NOTE:

The report can be made narrower by deselecting columns, reducing column width and reducing font size.

NOTE:

The **Result Table** gives you the option to save your query results in three different file formats which you can then export to a word processing application, spread sheet, etc.

- If the **Query type** is set to "Select", then **The Result Table** will display the result of the query.

If the **Query type** is set to "Delete" or "Update", then **The Result Table** will display a preview of just the rows which will be modified by this query when you click the **Post Edit** button .

To Print a Report in SQL Builder:

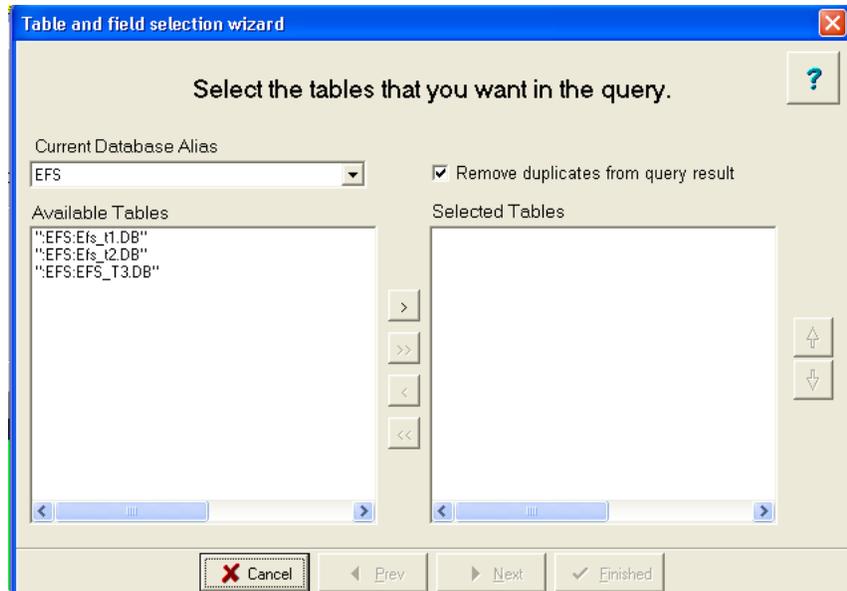
- Before printing, change the report layout to fit on the page by setting the result table's font, column width and column order. Then click on the **Printer** button .

To Save Query Results:

- Click the **Save** button. The **Save Result Table** box will appear. Click on the drop-down arrow in the **Save File As Type** box and select a file type. Name your file and make sure the correct destination drive and folder are selected then press the **OK** button.

The Query Tables and Fields Wizard

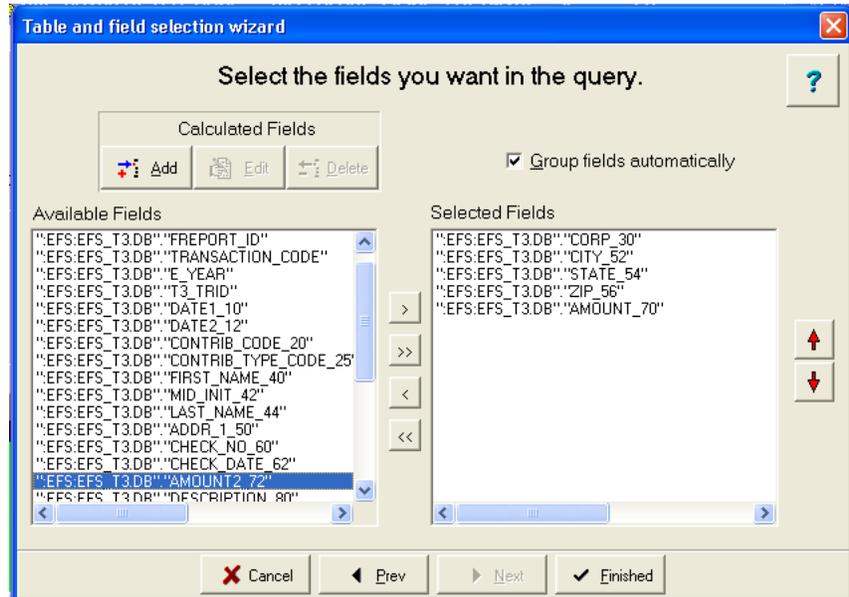
- The Wizard takes the inexperienced user through the steps in creating a valid SQL query. You can simply pick what you want, and then click the **Next** or **Previous** buttons to go forward or backward through the wizard.



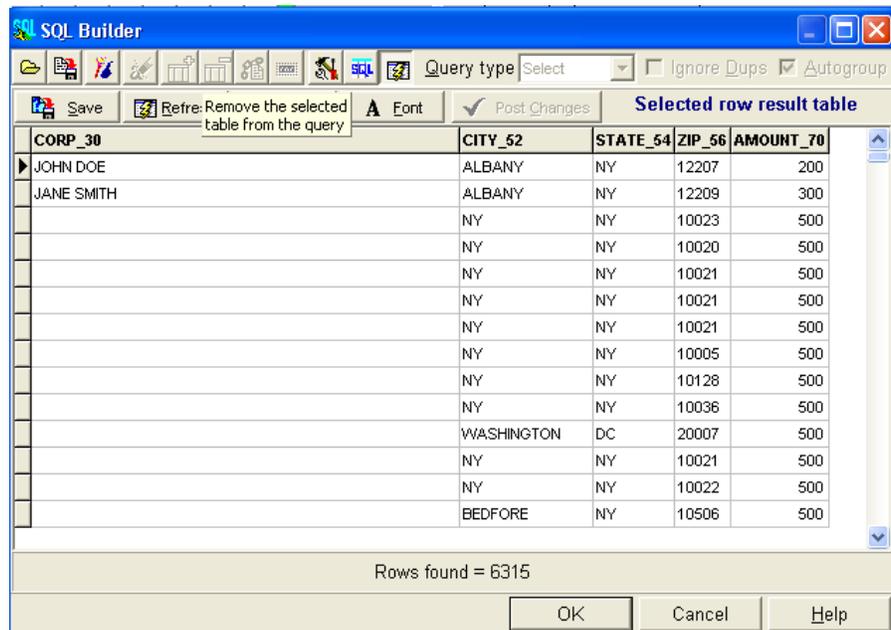
To Use the Query Tables and Field Wizard:

- 1) Click on **The Query Tables and Fields Wizard** button  on the SQL Builder menu bar.
- 2) The **Table and Field Selection Wizard** box will appear. The first screen displays a list of tables available in the selected database. As tables are selected, the joins between those tables are set up (automatically where possible).
- 3) When the **Next** button is clicked, a second screen will show a list of **Available Fields** from the tables you just selected.

- 4) Double click to select the fields you want in your query and set their order by using the **Up** and **Down** buttons. If you want to include a user-defined calculated field, click the **Add** button and complete the details. The field will then be added to the **Selected Fields** list.



- 5) Click on the **Finished** button and then click on the **Show Result Table** button  to run your query.



To Add Additional Tables to the Query:

- 1) Click on the **Insert Table** button  on your SQL Builder Menu Bar and select the table you want to add, then click **OK**.
- 2) The **Table Join Editor** will appear. If there is a natural join between the newly added table and the previously selected table, the information will already be set up for you to confirm.



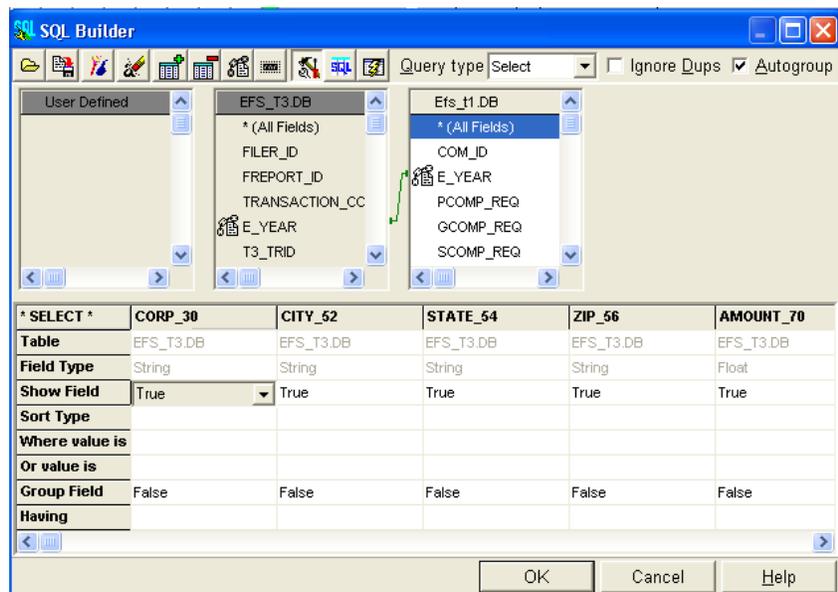
NOTE:

You can select different join fields or enter more complex joins by clicking the **Custom Button** and filling in the join type and criteria.

- 3) To add a join between fields, hold down the left mouse button and drag the first field to be joined to the other field and release the mouse button.

NOTE:

Joins between fields are represented by connecting lines between the joined fields, dark red for inner joins and green for outer joins.



APPENDIX: EFS DATA ELEMENTS

SCHEDULES																		
FIELD NAMES	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
DATE1_10	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
DATE2_12											X	X	X					
CONTRIB_CODE_20	X			X											X	X		
CONTRIB_TYPE_CODE_25				X														
CORP_30	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
FIRST_NAME_40	X			X											X	X		X
MID_INIT_42	X			X											X	X		X
LAST_NAME_44	X			X											X	X		X
ADDR_1_50	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	X
CITY_52	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	
STATE_54	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	
ZIP_56	X	X	X	X	X	X	X	X	X	X	X	X	X	X		X	X	
CHECK_NO_60	X	X	X			X	X	X		X			X			X	X	
CHECK_DATE_62										X								
AMOUNT_70	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
AMOUNT2_72											X			X	X			
DESCRIPTION_80				X														
OTHER_RECPT_CODE_90					X													
PURPOSE_CODE1_100						X								X			X	
PURPOSE_CODE2_102																		
EXPLANATION_110	X	X	X		X	X								X	X		X	
XFER_TYPE_120							X	X										
CHKBOX_130									X					X				

A - Monetary Contributions/Individual & Partnerships
 B - Monetary Contributions/Corporate
 C - Monetary Contributions/All Other
 D - In-Kind Contributions
 E - Other Receipts
 F - Expenditure/Payments
 G - Transfers In
 H - Transfers Out
 I - Loans Received
 J - Loan Repayments
 K - Liabilities/Loans Forgiven
 L - Expenditure Refunds

M - Contributions Refunded
 N - Outstanding Liabilities
 O - Partners / Subcontracts
 P - Non Campaign Housekeeping Receipts
 Q - Non Campaign Housekeeping Expenses
 R - Amount Allocated

APPENDIX: EFS DATA ELEMENTS

DATA ELEMENT INVENTORY for table EFS_Transactions_T3:

Date Element Name	Data Type	Len	Start Pos	End Pos	Table	Schedule(s)	Description
FILER_ID	Char(6)	6	1	6	EFS_TRANSACTIONS_T3	KEY-1 ALL	Filer ID Number
FREPORT_ID	Char(1)	1	7	7	EFS_TRANSACTIONS_T3	KEY-2 ALL	Report ID ¹
TRANSACTION_CODE	Varchar2(1)	1	8	8	EFS_TRANSACTIONS_T3	KEY-3 ALL	Transaction Code ²
E_YEAR	Varchar2(4)	4	9	12	EFS_TRANSACTIONS_T3	KEY-4 ALL	Filing Year
T3_TRID	Number(10)	10	13	22	EFS_TRANSACTIONS_T3	KEY-5 ALL	Transaction ID
DATE1_10	Date	10	23	32	EFS_TRANSACTIONS_T3	A-R	Date of Schedule Transaction
DATE2_12	Date	10	33	42	EFS_TRANSACTIONS_T3	K, L, M	Original Date of Liability, Payment Date or Date Received
CONTRIB_CODE_20	Varchar2(4)	4	43	46	EFS_TRANSACTIONS_T3	A, D, O, P	Contributor Code ³
CONTRIB_TYPE_CODE_25	Varchar2(1)	1	47	47	EFS_TRANSACTIONS_T3	D	Contribution Type Code ⁴
CORP_30	Varchar2(50)	50	48	97	EFS_TRANSACTIONS_T3	A-Q	Corporation Name / Payee etc.
FIRST_NAME_40	Varchar2(10)	10	98	107	EFS_TRANSACTIONS_T3	A, D, O, P, R	First Name of Contributor, Candidate
MID_INIT_42	Varchar2(1)	1	108	108	EFS_TRANSACTIONS_T3	A, D, O, P, R	Middle Initial of Contributor, Candidate
LAST_NAME_44	Varchar2(15)	15	109	123	EFS_TRANSACTIONS_T3	A, D, O, P, R	Last Name of Contributor, Candidate
ADDR_1_50	Varchar2(40)	40	124	163	EFS_TRANSACTIONS_T3	A-N, P-R	Mailing Address (Contributor), District/Office/Election Year (Schedule R)
CITY_52	Varchar2(15)	15	164	178	EFS_TRANSACTIONS_T3	A-N, P, Q	Mailing Address City (Contributor)
STATE_54	Varchar2(2)	2	179	180	EFS_TRANSACTIONS_T3	A-N, P, Q	Mailing Address State (Contributor)
ZIP_56	Varchar2(5)	5	181	185	EFS_TRANSACTIONS_T3	A-N, P, Q	Mailing Address Zip (Contributor)
CHECK_NO_60	Varchar2(10)	10	186	195	EFS_TRANSACTIONS_T3	A-C, F-H, J M, P, Q	Check Number
CHECK_DATE_62	Date	10	196	205	EFS_TRANSACTIONS_T3	J	Check Date

APPENDIX: EFS DATA ELEMENTS

DATA ELEMENT INVENTORY for table EFS_Transactions_T3 continued:

Date Element Name	Data Type	Len	Start Pos	End Pos	Table	Schedule(s)	Description
AMOUNT_70	Number(9,0)	9	206	215	EFS_TRANSACTIONS_T3	A-R	Amount on Schedule(s), Attributed
AMOUNT2_72	Number(9)	9	216	225	EFS_TRANSACTIONS_T3	K, N, O	Amount Forgiven, Outstanding, Attributed.
DESCRIPTION_80	Varchar2(36)	36	226	261	EFS_TRANSACTIONS_T3	D	Description
OTHER_RECPT_CODE_90	Varchar2(24)	24	262	285	EFS_TRANSACTIONS_T3	E	Other Receipt Code ⁵
PURPOSE_CODE1_100	Varchar2(5)	5	286	290	EFS_TRANSACTIONS_T3	F, N, Q	Expenditure Purpose Codes ⁶
PURPOSE_CODE2_102	Varchar2(5)	5	291	295	EFS_TRANSACTIONS_T3	NOT USED	Expenditure Purpose Codes ⁷
EXPLANATION_110	Varchar2(36)	36	296	331	EFS_TRANSACTIONS_T3	A-C, E, F, N, O, Q	Explanation
XFER_TYPE_120	Varchar2(1)	1	332	332	EFS_TRANSACTIONS_T3	G, H	Transfer type ⁸
CHKBOX_130	Varchar2(1)	1	333	333	EFS_TRANSACTIONS_T3	I, N	Bank Loan Check Box ⁹
CREREC_UID	Varchar2(8)	8	334	341	EFS_TRANSACTIONS_T3	ALL	User ID of User who created Rec
CREREC_DATE	DateTime	19	342	360	EFS_TRANSACTIONS_T3	KEY-6 ALL	Date Record was created
FILER_TYPE	Varchar2(2)	2	361	362	EFS_TRANSACTIONS_T3	NOT USED	Filer Type ¹⁰
CONTRIBUTION_RECEIVER	Varchar2(50)	50	363	412	EFS_TRANSACTIONS_T3	ALL	Filer PIN is stored in first 8 characters
COUNTY	Varchar2(4)	4	413	416	EFS_TRANSACTIONS_T3	NOT USED	County

APPENDIX: EFS DATA ELEMENTS

End Notes for Data Elements:

1) FReport ID (Report ID):

A 32 DAY Pre Primary	G 32 Day Pre Special
B 11 Day Pre Primary	H 11 Day Pre Special
C 10 Day Post Primary	I 27 Day Post Special
D 32 Day Pre General	J Periodic Jan. 15, 20__
E 11 Day Pre General	K Periodic July 15, 20__
F 27 Day Post General	L Off Cycle

2) Transaction Code (Schedule):

A - Monetary Contributions/Individual & Partnerships
B - Monetary Contributions/Corporate
C - Monetary Contributions/All Other
D - In-Kind Contributions
E - Other Receipts
F - Expenditure/Payments
G - Transfers In
H - Transfers Out
I - Loans Received
J - Loan Repayments
K - Liabilities/Loans Forgiven
L - Expenditure Refunds
M - Contributions Refunded
N - Outstanding Liabilities
O - Partners / Subcontracts
P - Non Campaign Housekeeping Receipts
Q - Non Campaign Housekeeping Expenses
R - Amount Allocated

3) Contrib_Code_20 (Contributor Code):

CAN - Candidate/Candidate Spouse
FAM - Family Members
CORP - Corporate
IND - Individual
PART - Partnership
COMM - Committee

4) Contrib_Type_Code_25 (Contribution Type Code):

1 = Services/Facilities Provided
2 = Property Given
3 = Campaign Expenses Paid

5) Other_Recpt_Code_90: (Other receipt Codes):

INT/DIV Interest/Dividend
PROC Proceeds Sale/Lease
OTH Other

APPENDIX: EFS DATA ELEMENTS

End Notes for Data Elements continued:

6) Purpose_Code1_100: (Expenditure Purpose Codes):

CMAIL	Campaign Mailings	POLLS	Polling Costs
CONSL	Campaign Consultant	POSTA	Postage
CONSV	Constituent Services	PRINT	Print Ads
CNTRB	Political Contributions	PROFL	Professional Services
FUNDR	Fundraising	RADIO	Radio Ads
LITER	Campaign Literature	RENTO	Office Rent
OFFCE	Office Expenses	TVADS	Television Ads
OTHER	Other: Must Provide Explanation	VOTER	Voter Reg. Materials or Services
PETIT	Petition Expenses	WAGES	Campaign Workers' Salaries
INT	Interest Expense		

7) Purpose_Code2_102:

RENTO	Office Rent
UTILS	Utilities
PAYRL	Payroll
POSTA	Postage
PROFL	Professional Services
OFEXP	Office Expenses
MAILS	Mailings
OTHER	Other: Provide Explanation
VOTER	Voter Registration Materials or Services

8) Xfer_Type_120 (Transfer Type):

Type 1 - Party/Constituted Committees
Type 2 - Committee Solely Supporting Same Candidate

9) Chkbox_130 (Bank Loan Check Box):

B - If Bank Loan
O - If Other

10) Filer_Type:

C - Candidate
R - Committee

APPENDIX: EFS DATA ELEMENTS

Record Layout for EFS Disclosure Transactions

FIXED POSITION

FIELD	LOCATION	TYPE	FORMAT	EFS IMPORT
FILER_ID	POSITION(001:006)	CHAR		REQUIRED
FREPORT_ID	POSITION(007:007)	CHAR		REQUIRED
TRANSACTION_CODE	POSITION(008:008)	CHAR		REQUIRED
E_YEAR	POSITION(009:012)	CHAR		REQUIRED
T3_TRID	POSITION(013:022)	INTEGER		
DATE1_10	POSITION(023:032)	DATE	'MM/DD/YYYY'	
DATE2_12	POSITION(033:042)	DATE	'MM/DD/YYYY'	
CONTRIB_CODE_20	POSITION(043:046)	CHAR		
CONTRIB_TYPE_CODE_25	POSITION(047:047)	CHAR		
CORP_30	POSITION(048:097)	CHAR		
FIRST_NAME_40	POSITION(098:107)	CHAR		
MID_INIT_42	POSITION(108:108)	CHAR		
LAST_NAME_44	POSITION(109:123)	CHAR		
ADDR_1_50	POSITION(124:163)	CHAR		
CITY_52	POSITION(164:178)	CHAR		
STATE_54	POSITION(179:180)	CHAR		
ZIP_56	POSITION(181:185)	CHAR		
CHECK_NO_60	POSITION(186:195)	CHAR		
CHECK_DATE_62	POSITION(196:205)	DATE	'MM/DD/YYYY'	
AMOUNT_70	POSITION(206:215)	FLOAT		
AMOUNT2_72	POSITION(216:225)	FLOAT		
DESCRIPTION_80	POSITION(226:261)	CHAR		
OTHER_RECPT_CODE_90	POSITION(262:285)	CHAR		
PURPOSE_CODE1_100	POSITION(286:290)	CHAR		
PURPOSE_CODE2_102	POSITION(291:295)	CHAR		
EXPLANATION_110	POSITION(296:331)	CHAR		
XFER_TYPE_120	POSITION(332:332)	CHAR		
CHKBOX_130	POSITION(333:333)	CHAR		
CREREC_UID	POSITION(334:341)	CHAR		
CREREC_DATE	POSITION(342:360)	DATE	'MM/DD/YYYY HH24:MI:SS'	
FILER_TYPE	POSITION(361:362)	CHAR		
PIN_NUMBER	POSITION(363:370)	CHAR		
COUNTY	POSITION(413:416)	CHAR		

APPENDIX: EFS DATA ELEMENTS

Record Layout for EFS Disclosure Transactions

DELIMITED ASCII

FIELD	LOCATION	TYPE	FORMAT	EFS IMPORT
FILER_ID	01	CHAR		REQUIRED
FREPORT_ID	02	CHAR		REQUIRED
TRANSACTION_CODE	03	CHAR		REQUIRED
E_YEAR	04	CHAR		REQUIRED
T3_TRID	05	INTEGER		
DATE1_10	06	DATE	'MM/DD/YYYY'	
DATE2_12	07	DATE	'MM/DD/YYYY'	
CONTRIB_CODE_20	08	CHAR		
CONTRIB_TYPE_CODE_25	09	CHAR		
CORP_30	10	CHAR		
FIRST_NAME_40	11	CHAR		
MID_INIT_42	12	CHAR		
LAST_NAME_44	13	CHAR		
ADDR_1_50	14	CHAR		
CITY_52	15	CHAR		
STATE_54	16	CHAR		
ZIP_56	17	CHAR		
CHECK_NO_60	18	CHAR		
CHECK_DATE_62	19	DATE	'MM/DD/YYYY'	
AMOUNT_70	20	FLOAT		
AMOUNT2_72	21	FLOAT		
DESCRIPTION_80	22	CHAR		
OTHER_RECPT_CODE_90	23	CHAR		
PURPOSE_CODE1_100	24	CHAR		
PURPOSE_CODE2_102	25	CHAR		
EXPLANATION_110	26	CHAR		
XFER_TYPE_120	27	CHAR		
CHKBOX_130	28	CHAR		
CRREC_UID	29	CHAR		
CRREC_DATE	30	DATE	'MM/DD/YYYY HH24:MI:SS'	
FILER_TYPE	31	CHAR		
PIN_NUMBER	32	CHAR		
COUNTY	33	CHAR		

(RecordSeparator): CR-LF

(FieldSeparator): ,

(FieldStartDelimiter): "

(FieldEndDelimiter): "

(FieldDelimitStyle): all

(StripLeadingBlanks): True

(StripTrailingBlanks): True

APPENDIX: EFS DATA ELEMENTS

Mandatory Fields in EFS

Schedule	Mandatory Fields	Default
A	Date Received Code	Use last day of filing period. Contact Campaign Finance.*
B	Date Received Corporation	Use last day of filing period. Contact Enforcement Counsel.**
C	Date Received Name	Use last day of filing period. Contact Enforcement Counsel.**
D	Date Received Code	Use last day of filing period. Contact Campaign Finance.*
E	Date Received Code Receipt Source	Use last day of filing period. Use "OTH=Other" Contact Enforcement Counsel.**
F	Date Paid Purpose Code Payee	Use last day of filing period. Use "Other" Contact Enforcement Counsel.**
G	Transfer Date Transfer Type Name	Use last day of filing period. Contact Campaign Finance.* Contact Enforcement Counsel.**
H	Transfer Date Transfer Type Name	Use last day of filing period. Contact Campaign Finance.* Contact Enforcement Counsel.**
I	Loan Date Type Lender Name	Use last day of filing period. Use "O=Other" Contact Enforcement Counsel.**
J	Loan Date Lender Name	Contact Campaign Finance.* Contact Enforcement Counsel.**
K	Date Forgiven Vendor/Lender	Use last day of filing period. Contact Enforcement Counsel.**

APPENDIX: EFS DATA ELEMENTS

Mandatory Fields in EFS continued

Schedule	Mandatory Fields	Default
L	Date Received Name	Use last day of filing period. Contact Enforcement Counsel.**
M	Refund Date Contributor Name	Use last day of filing period. Contact Enforcement Counsel.**
N	Date Type Name Purpose Code	Use last day of filing period. Contact Campaign Finance.* Contact Enforcement Counsel.** Use "Other"
O	Part Partnership Name Date Subc Contractor Name Date	Contact Campaign Finance.* Contact Enforcement Counsel.** Use last day of filing period. Contact Campaign Finance. Contact Enforcement Counsel. Use last day of filing period.
P	Date Received Code	Use last day of filing period. Contact Campaign Finance.*
Q	Date Paid Name	Use last day of filing period. Contact Enforcement Counsel.**
R	Date	Use last day of filing period.

* Campaign Finance - (518) 474-8200

**Enforcement Counsel - (518) 474-2063

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