

To Import Data into EFS:

This feature is intended for importing files that were exported from the EFS software only. If you are importing a past filing(s) that you requested be sent to you from the Help Desk, then the first thing you will need to do is to save the attached file(s) from the email onto your computer.

For the **EFS 5.1** program:

Please note: All of the schedules in your currently selected filing period will be deleted and replaced with the schedules in the old filing you have chosen to import. Importing filings out of order could give you an incorrect running balance. To continue to use the running balance feature of the software, import all sequential filings. E.g., if only 2012 filings exist in your current software and you need to import a 2010 filing, then all filings submitted between the 2010 filing and the first 2012 filing would need to be imported also.

1. Create the **Reporting Cycle**:

- a. Click **Add a New Reporting Cycle**.
- b. Select the Reporting Cycle from the drop down menu and click **Continue**.
- c. Enter or select the date of the Election and click **Save**.

2. For Primary, General and Special Election Reports, select the **Reporting Period** from the drop down menu.

3. Click **File** in the menu bar. Then click **Import a Previously Completed Disclosure Report**.

4. Select **Replace** to delete all existing transactions in the selected reporting cycle and reporting period and replace them with the imported transactions or select **Append** to add the imported transactions to the existing transactions in the selected reporting cycle and reporting period.

5. Click **Continue**.

6. Click the **Look In** drop down box to display a list of drives and select the drive where the file you want to import is saved, click on the file name and click **Open**.

For the **EFS 4.0** program:

1) Go into Inventory Maintenance and Create the **Filing Year**, **Filing Period** and **Schedules** that you want to import into. (Whatever schedules were contained in the original report that you're importing you must first create in Inventory Maintenance; all the schedules, not just the one you need to correct.)

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 the EFS User Guide's Appendix: EFS Data Elements.*

3) Select the **Data Format** and click **OK**.

4) Click on the **Drive** where the file you want to import is saved, click on the **File Name** and click **Open**. (If you do not see the file you want to import listed and you're certain that you're looking in the place that you saved it to then type just the first character of the file name (A or C) in the file name field. This usually causes the files that begin with that letter to pop up then you can click on the file that you are trying to import.)

5) In the **Transaction Section**, you will see a box saying how many records were imported.