

GETTING STARTED GUIDE FOR THE CAMPAIGN FINANCE ELECTRONIC FILING SOFTWARE (TX-CFS version 3.4.3) for Windows XP (with Service Pack 3), Windows Vista, Windows 7

UPGRADING THE SOFTWARE ON YOUR COMPUTER. If you previously installed the TX-CFS software in the default location on your computer, please make sure it is NOT running, then open the folder where you unzipped the file TX_up343.zip and double click on the “Install.bat” icon to start the installation program. NOTE: IF you downloaded the file TX_up343.exe instead, double click on that file. It will automatically unzip the files into the folder “c:\temp\TX-CFS” and start the installation program.


NOTE: The upgrade will work **only** if you previously installed the TX-CFS software in the default location of “c:\Program Files\TX-CFS.” **If you previously installed the TX-CFS software in a different location, cancel the upgrade and then follow the instructions for manually upgrading near the end of this document.**

INSTALLING THE SOFTWARE ON YOUR COMPUTER FOR THE FIRST TIME. Windows Vista / Windows 7 users please read the last section of this document, titled “Windows Vista / Windows 7 Notes,” before proceeding. Open the folder where you unzipped the file TXCFS343.zip and double click on the “Install.bat” icon to start the installation program. NOTE: if you downloaded the file TXCFS343.exe instead, double click on that file. It will automatically unzip the files into the folder “c:\temp\TX-CFS” and start the installation program.

An installation screen will appear. Follow the instructions on the screen. **Do not change the default installation folder: “c:\Program Files\TX-CFS.”** If you cannot install in the default location, then install in another location and follow the directions at the end of this document for manually upgrading. After you click “Finish,” you may be asked to restart your computer to complete installation. After you restart your computer, this Texas Campaign Finance Software icon (TX-CFS) should appear on your screen along with a similar icon titled “TX-CFS Conversion Utility.” You may delete the icon for the conversion utility because it was used to convert data from the older TECDFS software, which was retired in July, 2005.



STARTING THE SOFTWARE. Start the software by double clicking on the TX-CFS icon on your screen. The main menu will appear. If there is no TX-CFS icon on your screen, take the following steps:

- Click on 
- Select “Programs” and then select TX-CFS from the list of programs.

ADDING A FILER TO THE SOFTWARE. If you have not yet entered any filer information in the software, the top button will be labeled “Add a New Filer,” and only the “Add a New Filer” and “Exit Program” buttons will be activated. Select “Add a New Filer” to enter basic information about a filer. (If this button is not available on your screen, highlight the word “Filer” on the left side of the screen.) Each document you file will include the information entered here. You may change basic information for purposes of future filings by highlighting the name of the filer on the left side of the screen and selecting “Edit Selected Filer.” (The button labeled “Edit Selected Filer” will not be available unless you have entered basic information about at least one filer and you have the name of the filer highlighted.) The following screen will appear:

The screenshot shows a software window with three tabs: "Candidate/Officeholder", "Treasurer", and "Email/Password". The "Candidate/Officeholder" tab is active. Below the tabs is a form with two main sections: "Filer" and "Address".

Filer Section:

- Filer Account #: 00049525
- Filer Type: Judicial Candidate or Officeholder (JCOH)
- Last Name: [Empty text box]
- First Name: [Empty text box]
- Ms./Mrs./Mr: [Dropdown menu]
- Suffix: [Dropdown menu]
- Nickname: [Empty text box]

Address Section:

- Addr. Line 1: [Empty text box]
- Addr. Line 2: [Empty text box]
- City: [Empty text box]
- State: [Dropdown menu]
- Zip: [Empty text box]

Filer Account #. Enter the account number issued by the Texas Ethics Commission. Be sure to include the three leading zeros. If you do not file reports with the Ethics Commission, you may enter any number.

Filer Type. Select the filer type for which you are filing.

Enter other information as applicable. Please note that you must click on the “Treasurer/Chair” tab at the top right of this window to enter information about a treasurer or chair if applicable. Click on the tab labeled “Email/Password” to enter the email address you want TEC to use to send you communications, such as Notices to File reports. You may add additional email addresses online at <http://www.ethics.state.tx.us/>

Saving Information. Click on “Save” if the information is correct. After saving, you may click on “Edit” if you need to change filer information, or click on “Close” to return to the main menu. After you have entered filer information in the software, the filer will be included in a list on the main menu.

Entering Information about More than One Filer. Although most users will enter information about only one filer in the software, it is possible to use the software to store information about and generate reports for more than one filer.

To add a new filer, make sure the word “Filers” on the left side of the screen is highlighted and click on “Add a New Filer.” (Note: If a name in the filer list is highlighted the button on the top right side of the screen will read “Edit Selected Filer,” instead of “Add a New Filer.”)

ADDING A REPORT. To create a report, highlight the name of the filer on the left side of the main menu screen and click the “Add a New Report” button. Highlight the report type on the left side of the window that appears and then click on the “Add Report” button on the right.

IMPORTING A REPORT. If you have the data file for a report (either XML or the older PDP format), you can import it into the software. Please see “HowToImportAReport.pdf” in the Import subfolder of the folder where the software is installed.

IMPORTING CONTRIBUTIONS AND EXPENDITURES. You can import contributions and expenditures that are in comma-separated value (.csv) format. Please see “HowToImportContributionsAndExpenditures.pdf” in the Import subfolder of the folder where the software is installed.

General Report Information/Cover Sheet Screen. Now that you have created a filer in the software, you may begin entering detailed reporting information. Enter the appropriate information on the report “Cover Sheet” screen, and then click the “Save” button. After you have entered information for the cover sheet screen, you must enter other information by clicking on the buttons labeled “Report Totals,” or “Detail Records-.....” at the bottom of this window. After you have entered all the appropriate detail or total information, click the “Close” button to return to the main menu of the software.

PREVIEWING / PRINTING A REPORT. To preview a report, highlight the report on the left side of the screen and click the “Preview a Report” button. You must have Adobe Reader to view a report. If you do not have Adobe Reader on your computer, you may download a free copy from www.Adobe.com, or call our office for technical assistance.

FILING A REPORT. To file a report, highlight the report on the left side of the screen and click the “Validate / File a Report” button on the right side.

Checking for Errors in a Report. Before filing a report you may want to check the report for errors that might cause the report to be rejected by the Ethics Commission. If you have not already done so, highlight the report on the left side of the screen and click on the Validate/File Report button on the right side. In the “Validate/Preview/File Report” window that appears, highlight the report and click on the “Validate Report” button. A document will open using Adobe Reader. Review and/or print the document for a summary of errors. Any errors listed with a Level 8 or higher must be corrected in order to successfully file a report electronically. Errors below Level 8 should also be corrected prior to filing. Click on the “X” at the top right corner of the window to close the document. Close the “Validate/Preview/File Report” window to go back to the report and fix the errors. (Please note that passing validation does not mean that you have satisfied all legal requirements. It only means that you have data present in the fields that must have data in order for a report to be transmitted electronically.)

There are two options available for filing a report electronically:

File Report. In the “Validate/Preview/File Report” window, highlight the report to be filed and click the “File Report” button. On the “Affidavit” screen, type the name of the person legally responsible for filing the report in the “Person” field. Next you must decide to file your report online via the Internet or by copying it to CD or diskette. To file online, click the “File Report Online” button and follow the

steps below under “File Report Online.” To file by CD or diskette, click the “File Report on CD/Disk” button and follow the steps below under “File Report on CD/Disk.”

File Report Online. Enter the password issued to you by the Texas Ethics Commission in the field labeled “Password.” Re-enter the password to verify it, then check the “Confirmation Receipt Requested” box and enter your e-mail address if you want to receive a confirmation of filing received by the Ethics Commission. Next, click the “File Report” button to file your report via the Internet.

The first time you file electronically using the Internet, a window may appear requesting the generation of random bits. Place your mouse in this window and keeping it in the window, move the mouse quickly until the bar at the bottom of the window moves completely from left to right.

Please wait while the software transmits the data. This step may take several minutes. A message window should appear stating whether your filing succeeded or failed. If the filing was accepted, please make a note the confirmation number; e.g., “TX-123456”. If the filing did not succeed, try following the suggestions provided in the built-in help, or call TEC at (512) 463-5800 for technical assistance.

If your report is filed successfully, it will be marked as “filed” on the main menu of the software and you should receive an email confirmation from “Oracle Database Owner” within 15 minutes. If you do not receive the email confirmation, try checking the “junk mail” folder in your email software.

File Report on CD/Disk. Most filers find it more convenient to file online. If you want to file on a CD or Diskette instead, click on “File Report on CD/Disk”. Enter the password issued by the Texas Ethics Commission in the “Password” field, then re-enter the password for verification. Select the drive where you want to save the electronic filing. This can be the C:\ drive or the A:\ drive (3.5” diskette). Next, click on the “Create File” button and wait for the software to create the file. The name of the file should be displayed on the screen. The filename should end with the extension “.xml.asc”. If you receive an error message the TX-CFS software is unable to file, please follow the directions below for “Troubleshooting CD/Disk filing problems”. Otherwise, click “Yes” to mark the report as filed.

Note: the TX-CFS software cannot automatically copy files to CDs. First, create the file ending with “.xml.asc” on your C:\ drive and then copy it and write it onto the CD using your computer’s CD duplication software or the Windows XP/Vista/7 CD writing wizard. Refer to the Windows XP/Vista/7 Help and Support Center for more information. After writing to a CD, please verify the file exists on the CD before sending it to the Ethics Commission.

Remember to mail or hand-deliver the CD or diskette with the report to the Texas Ethics Commission. Please be sure to label the CD or diskette with the filer’s name, TEC account number and contact email or phone number. NOTE: Certain campaign finance reports must be **received** by TEC by 5:00 p.m. on the filing deadline. If the CD or diskette is not **received** by 5:00 p.m. on the filing deadline, the report will be considered late, regardless of the postmark date. Please consult the filing schedule for your filer type on the TEC website at www.ethics.state.tx.us for more information.

Troubleshooting CD/Disk filing problems: If you receive an error message “File Not Found,” please follow the instructions for manually upgrading at the end of this document. If you are still unable to file to CD or Disk, you may validate the report then copy the most recent file with an “.xml” extension from the “C:\Program Files\TX-CFS\Upload” folder onto a CD or Disk, and send it to TEC, along with a signed statement that you are submitting an “unencrypted” report because you were not able to file it normally. **Windows Vista / Windows 7 Note:** the .xml file may be stored in an alternate location: “c:\Users\(\username)\AppData\Local\VirtualStore\Program Files\Lobby Electronic Filing Application\Upload” – please read the last section of this document titled “Windows Vista / Windows 7 notes.”

BUILT-IN HELP. Clicking on “HELP” explains most of the legal filing requirements for filing reports. For further information about filing requirements, filers may refer to the appropriate filing guide. Filing guides are available on our website. Additionally, filers may find the applicable instructions for completing paper reports to be useful. The instructions are also available on our website. *If you can’t view the Help, please see the last paragraph of this document entitled “Special note for Windows 95/98/ME Users.”*

PHONE NUMBER. You may call (512) 463-5800 during normal business hours if you have technical questions about electronic filing, or if you have questions about the legal requirements.

Please check the “Campaign Finance Filing” link under the “File Reports Electronically” section on our website at www.ethics.state.tx.us for more information.

HOW TO MANUALLY UPGRADE if software not installed in “c:\Program Files\TX-CFS”

Option 1: Edit the file ElfPath.txt in the folder where you unzipped the TX_up343.zip file and change it to the path where the software is installed. Then double-click on Install.bat in that same folder. NOTE: If you downloaded TX_up343.exe instead, it will automatically unzip the files into the folder “c:\temp\TX-CFS.”

Option 2: Copy the following files from the folder where you unzipped the TX_up343.zip file to the folder where you installed the software on your computer. NOTE: If you downloaded TX_up343.exe instead, it will automatically unzip the files into the folder "c:\temp\TX-CFS."

\Program Files\TX-CFS\Elf.exe	Elf.exe
\Program Files\TX-CFS\TX-CFS.ini	TX-CFS.ini
\Program Files\TX-CFS\Update.exe	Update.exe
\Program Files\TX-CFS\Help*. * (all files)	Help*. *
\Program Files\TX-CFS\Validate\TXValidator.exe	Validate\TXValidator.exe
\Program Files\TX-CFS\Validate\Text\TX_SCRIPT.TEXT	Validate\Text\TX_SCRIPT.TEXT
\Program Files\TX-CFS\Validate\Text\TEXAS.SMRY_TOTALS.TEXT	Validate\Text\TEXAS.SMRY_TOTALS.TEXT
\Program Files\TX-CFS\xyp*. * (all files)	xyp*. *
\Program Files\TX-CFS\pgpw2x_32.dll	Upload\pgpw2x_32.dll
\Program Files\TX-CFS\pgpwck_32.dll	Upload\pgpwck_32.dll
\Program Files\TX-CFS\smp1pgp_32.dll	Upload\smp1pgp_32.dll
\encrypt.exe	Upload\encrypt.exe
\TxLoadKey.asc	Upload\TxLoadKey.asc

Windows 95/98/ME/NT/2000 Notes

Although TEC cannot guarantee this version of the TX-CFS software will operate correctly with these older versions of Windows, previous versions of the software have. The help program in TX-CFS was created in the Windows HTML Help Format. Some older versions of Windows will need to have a small program patch in order to view the help. To install the patch, double-click on the file named HHUPD.exe located by default in the c:\Program Files\TX-CFS\Help folder.

Windows XP Notes

You must have Service Pack 3 (SP3) installed for the software to operate correctly. SP3 can be downloaded from www.microsoft.com.

Windows Vista / Windows 7 Notes

It is highly recommended that User Account Control (UAC) be turned off each time the TX-CFS software is used. Failure to turn off UAC will result in your data being stored in a hidden folder, and may prevent you from validating, previewing and filing your reports. TX-CFS will not install or upgrade properly when (UAC) is turned on. Please follow one of the two options below to install or upgrade TX-CFS on a Windows Vista or Windows 7 computer:

Option 1. Turn off User Account Control before installing. For instructions on how to make sure UAC is off, click the Windows start button and choose 'Help and Support' then type the phrase 'User Account Control' in the Search box, press Enter to search, and then follow the instructions for turning off UAC. NOTE: you may need to restart your computer before UAC is actually turned off. After the computer restarts, you may proceed with the installation or upgrade described above. As noted above, it is highly recommended that you always turn off UAC before using the software.

Option 2. Install with User Account Control on, then follow the directions above for upgrading manually. With UAC turned on, a warning will be displayed that "an unidentified program wants access to your computer." Please choose to "Allow" to start the installation process. After the Install Shield wizard is finished, you will see a black window with instructions to "press any key." Press any key, then wait while the installation program attempts to copy files to your computer. You will probably see an error message that the software updates were not installed successfully. Then follow the directions above for manually upgrading.

Copying data to default location in Windows Vista / Windows 7

By default, the software is installed in "c:\Program Files\TX-CFS" or "c:\Program Files (x86)\TX-CFS" in the 64-bit edition of Windows Vista / Windows 7. If data was entered with User Account Control turned on, Windows Vista / Windows 7 stores the data in the file: "c:\Users\(\username)\AppData\Local\VirtualStore\ProgramFiles\TX-CFS\Data\tecdbf.mdb" or "c:\Users\(\username)\AppData\Local\VirtualStore\Program Files (x86)\TX-CFS\Data\tecdbf.mdb" in the 64-bit edition. Your login name should be substituted for (username) in the path given above. Although this document recommends turning off UAC each time the TX-CFS software is used, some filers entered information in the software before learning of this recommendation. If data was previously entered with UAC turned on, and you are unable to validate, preview, or file a report with UAC turned on, you will need to move the data file to the default location (see next paragraph), then try validating or filing with UAC turned off. Note: AppData is a hidden folder, so if you are unable to see it, please see the next section entitled "Viewing hidden files and folders in Windows Vista / Windows 7".

Steps for copying the data file to the default location:

1. Make sure User Account Control (UAC) is turned OFF. For instructions on how to make sure UAC is off, click the Windows start button and choose 'Help and Support' then type the phrase 'User Account Control' in the Search box, press Enter to search, and then follow the instructions for turning off UAC. NOTE: you may need to restart your computer before UAC is actually turned off.

2. Make certain the TX-CFS software is NOT running.

3. Rename the existing file in the default location in case it too contains data. If you are certain UAC is turned off, and cannot see any reports or file names when you start the TX-CFS software, you may skip this step. Otherwise, click on the Windows start button and choose “Computer”, then navigate to the folder “c:\Program Files\TX-CFS\Data” and rename the file tecdbf.mdb to some other name such as tecdbf_001.mdb. In the 64-bit edition of Windows Vista / Windows 7, the folder will be “c:\Program Files (x86)\TX-CFS\Data”.

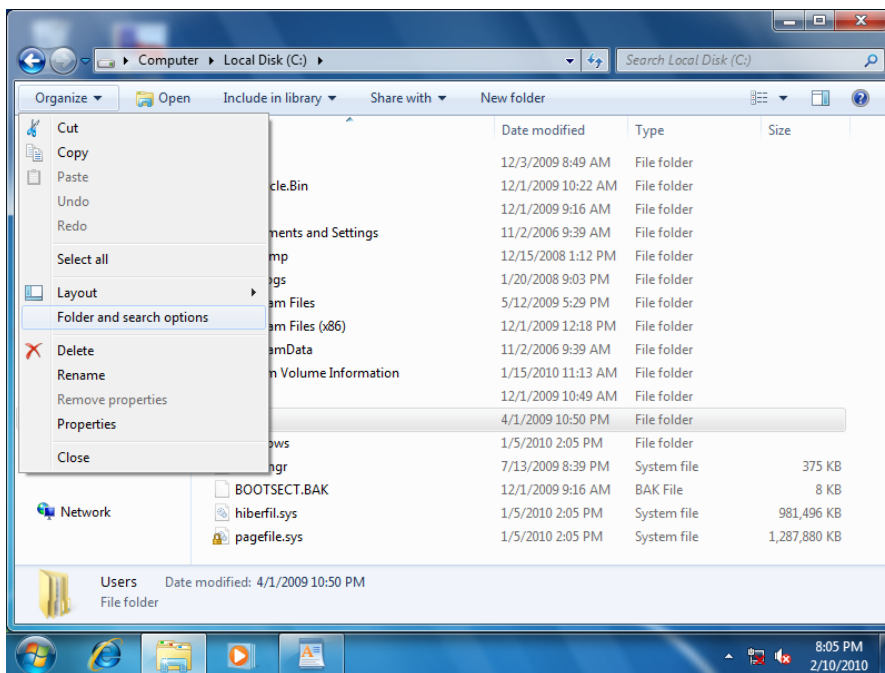
4. Click on the Windows start button and choose “Computer”, then navigate to the folder: “c:\Users\<(username)\AppData\Local\VirtualStore\Program Files\TX-CFS\Data” (or Program Files (x86)\TX-CFS\Data if 64-bit edition). If you can’t see the AppData folder, follow the directions below for *Viewing hidden files and folders in Windows Vista / Windows 7*. Copy the file tecdbf.mdb into the default folder in “c:\Program Files\TX-CFS\Data”, (or Program Files (x86)\TX-CFS\Data if 64-bit edition). One way to copy the file is: right-click on the file named tecdbf.mdb, and choose copy, then navigate to the default folder, right-click in a blank area of that folder, and choose paste. You should see the file tecdbf.mdb appear in the default location.

5. Start the TX-CFS software and verify that you can now view the reports that were previously entered with UAC turned on. Tip: you will need to turn off UAC each time you use the TX-CFS software.

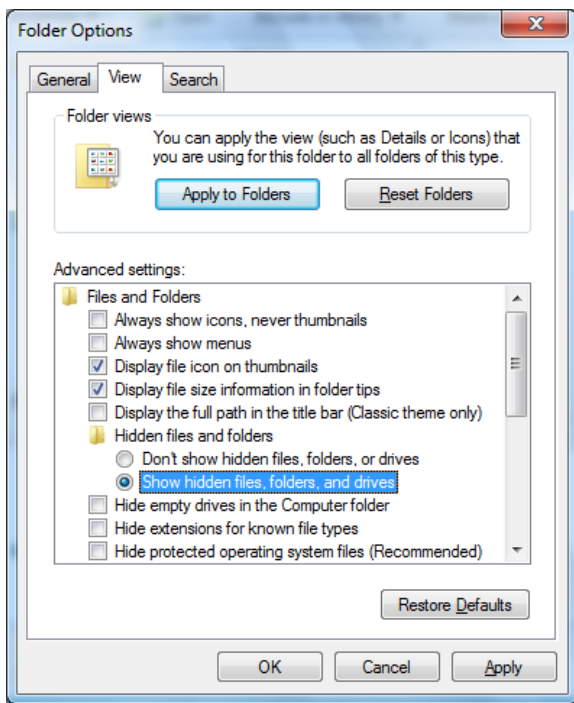
Viewing hidden files and folders in Windows Vista / Windows 7

1. Click on the Windows start button and choose Computer, then click on icon for the c: drive, usually labeled Local Disk (C:), then double click on the yellow folder named “Users”. Next, double-click on the yellow folder with same name as the user who is currently logged in. Inside that folder, if you cannot see a pale yellow folder named “AppData”, then you will need to follow the rest of the steps in this section.

2. Click on the “Organize” drop-down menu near the upper left corner of the “Computer” window, as in the screen shot below:



3. Click on “Folder and search options”, then click on the tab labeled “View.” The screen below should appear.



4. Click on the dot next to “Show hidden files, folders and drives.” You may want to also uncheck the box next to “Hide extensions for known file types.”

5. Click on the “OK” button. You should now be able to see the pale yellow AppData folder, and continue with the instructions on the previous page for copying the data to the default location.