GETTING STARTED GUIDE FOR THE
CAMPAIGN FINANCE ELECTRONIC FILING SOFTWARE (TX-CFS version 3.3.3)

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_up333.zip and double click on the "Install.bat" icon to start the installation program. NOTE: IF you downloaded the file TX_up333.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 at the end of this document.**

INSTALLING THE SOFTWARE ON YOUR COMPUTER FOR THE FIRST TIME. Open the folder where you unzipped the file TXCFS333.zip and double click on the "Install.bat" icon to start the installation program. NOTE: IF you downloaded the file TXCFS333.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."
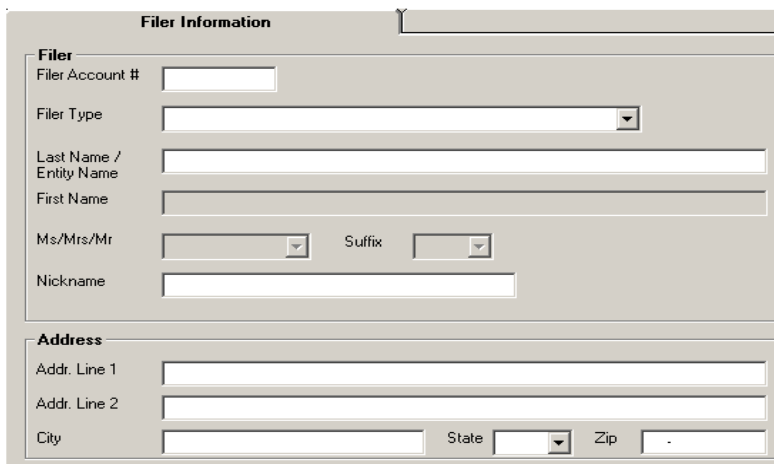
Converting Data Entered Using the Old TECDFS Software to the New TX-CFS Software. If you have previously filed electronic reports with the Ethics Commission using the TECDFS software, you will be able to transfer those reports and their data to the new software using the "TX-CFS Conversion Utility" icon on your desktop. NOTE: If you have previously used the TX-CFS Conversion Utility and are upgrading from one version of TX-CFS to another, **you should not run the TX-CFS Conversion Utility again.** If you have **not** previously used the Conversion Utility, double-click on the "TX-CFS Conversion Utility" icon on your desktop and follow the on-screen instructions.

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   **Start**

- 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:

Filer ID/Acct #. Enter the account number issued by the Texas Ethics Commission. Be sure to include the three leading zeros.

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.)

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 many 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.

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. 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 receive an error message, please call our office for technical assistance or click on the "Help" button and follow the suggestions provided in the built-in help.

File Report on CD/Disk. Most filers find it more convenient to file online. If you want to file on a CD or Disk instead, click on "File Report on CD/Disk" Enter the password issued by TEC in the "Password" field. Re-enter the password to verify it, then select the drive you wish to use and click on "File Report." 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 disk, you may validate the report then copy the most recent file with a ".pdp" 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.

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.

PHONE NUMBERS. You may call (888) 832-5445 during normal business hours if you have technical questions about electronic filing, or (512) 463-5800 or (800) 325-8506 if you have questions about the legal requirements.

Please check the "CAMPAIGN FINANCE ELECTRONIC FILING" section under the "ELECTRONIC FILING" 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"
Copy the following files from the folder where you unzipped the TX_up333.zip file to the folder where you installed the software on your computer. NOTE: If you downloaded TX_up333.exe instead, it will automatically unzip the files into the folder "c:\temp\TX-CFS."

Unzip location (default is c:\temp\TX-CFS)	Your folder (if other than c:\Program Files\TX-CFS)
\Program Files\TX-CFS\Elf.exe	Elf.exe
\Program Files\TX-CFS\Conversion.exe	Conversion.exe
\Program Files\TX-CFS\Help\WelfHelp.hlp	Help\WelfHelp.hlp
\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\smplpgp_32.dll	Upload\smplpgp_32.dll
\encrypt.exe	Upload\encrypt.exe
\TxLoadKey.asc	Upooad\TxLoadKey.asc