

Adjutant Software Customer Support Tech Notes

Document Title: Electronic Filing for Orange County, FL
Document Number: 028
Applies to: Campaign ToolBox

SUMMARY

This Tech Note describes how to create an Electronic Filing data file as requested by the Orange County Supervisor of Elections. This file is not the same as the file normally created by Campaign ToolBox for the state. Each candidate will create two files - a Contribution file and an Expense file. These files are submitted on a floppy disk and are in addition to the regular printed report.

This example will create a Contribution file - the Expense file is created in a similar manner as noted later in this document.

PROCEDURE

Each file is a tab-delimited file that is created using the Export Data function of Campaign ToolBox. (See illustration on following page)

1. From the blank screen, click on File > Export data.
2. Select "Contribution Records" in "Type of records to export".
3. Select "Tab-delimited" in "Type of export file".
4. In the "Available fields" box, double click on the following field names in the following order:

Date
LastName
FirstName
MiddleName
Suffix
Organization
AddressMajor
AddressMinor
City
State
ZipCode
EntityType
Occupation
TypeOfContrib
Amend
Amount

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Double-click on a field to move it from one list to another

Available fields

- Demographic.DemogID
- Prefix
- City
- State
- ZipCode
- Phone

Selected fields

- Date
- LastName
- FirstName
- MiddleName
- Suffix
- Organization

Show sample data

Select a field in the "Available fields" list, then click "Show sample data" button to display sample data.

Sample data (up to 50 recs)

Type of export file

- Comma separated value (.CSV)
- Tab delimited (.TXT)

Type of records to export

- Demographic/Support records
- Demographic/Issue records
- Contribution records
- Expense records

Filter/Sort

Export

Cancel

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5. Click on the Filter/Sort button to select the date range for this report. Use the format shown in the illustration to select the starting and ending dates of the report.

The screenshot shows the 'Filter and Sort Records' dialog box with the 'Filter Records' tab selected. It features three columns: 'Field', 'Comparison', and 'Compare To'. The first row is filled with 'Date', 'Greater than or Equal to', and '07/01/2005'. The second row is filled with 'Date', 'Less than or Equal to', and '09/30/2005'. Below these are three empty rows. At the bottom, there is a 'Query text' field and five buttons: 'Create query', 'Use modified SQL', 'Clear Filters', 'OK / Continue', and 'Cancel'.

6. Click on the “Sort Records” tab, then select the “Date” field to sort the records in date order.

The screenshot shows the 'Filter and Sort Records' dialog box with the 'Sort Records' tab selected. It features three 'Sort By' sections. The first section has 'Date' selected in the dropdown and 'Ascending' selected with a radio button. The second and third sections have empty dropdowns and 'Ascending' selected with radio buttons. A 'Clear Sorts' button is located at the bottom right.

7. Click the “Filter Records” tab, then click on the “Create Query” button.

8. Click on the “OK/Continue” button to return to the main Export form.

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9. Click the “Export” button and follow the prompts to create your export file. Orange County will rename the files to fit their needs, so you can just name them something like [candidatename]_contributions.txt.

10. Repeat these steps after selecting “Expense Records”. Use the Expense File fields listed below.

Contribution File

Date
LastName
FirstName
MiddleName
Suffix
Organization
AddressMajor
AddressMinor
City
State
ZipCode
EntityType
Occupation
TypeOfContrib
Amend
Amount

Expense File

Date
LastName
FirstName
MiddleName
Suffix
Organization
AddressMajor
AddressMinor
City
State
ZipCode
Purpose
TypeOfExpense
Amend
Amount

NOTES

For questions about creating the file using Campaign ToolBox, please contact Adjutant Software at 386-822-9181 or scm@adjutant.com.

For questions about the finished format, delivery, etc., please contact Mr. Fred Altensee at the Orange County Supervisor of Elections office at 407-836-2070 or fred-altensee@ocfelections.com.