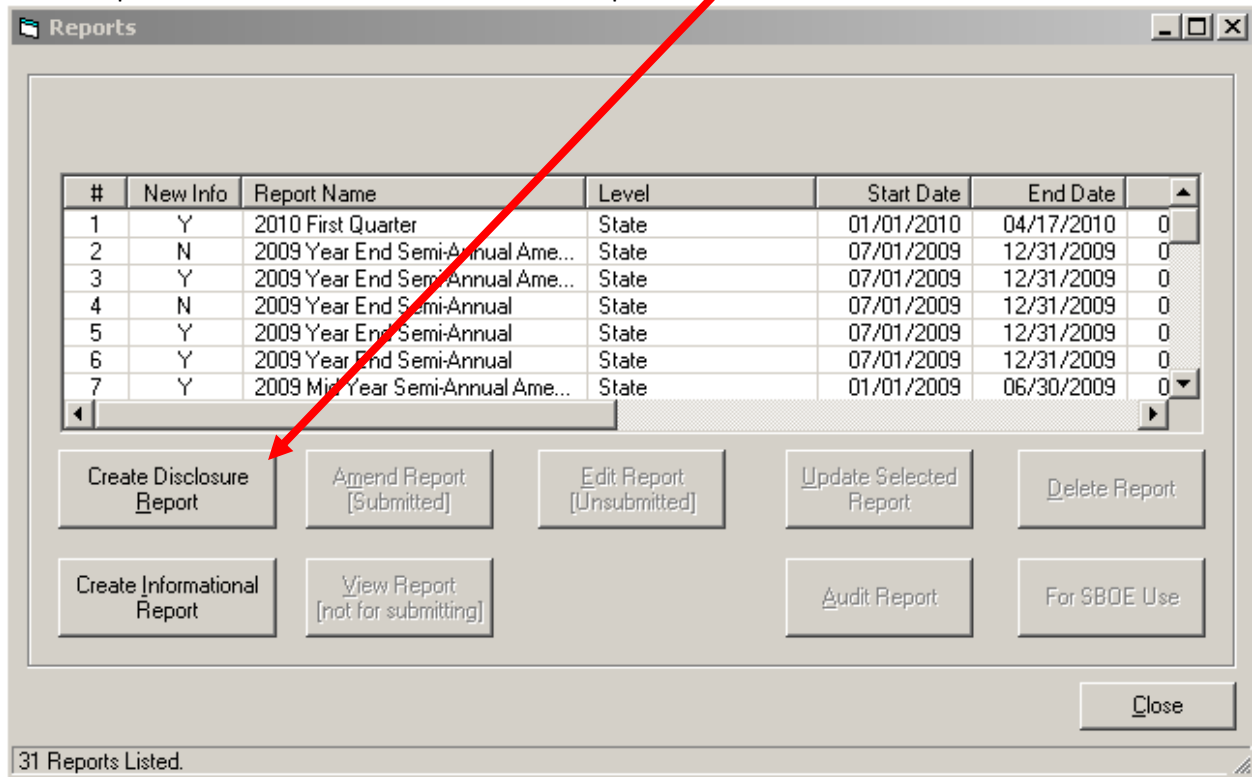


Create a Report

Once all contributions and expenses have been entered, and you are ready to create your report, follow the steps set out below.

Select Reporting → Report Information.

At the Reports screen select “Create Disclosure Report.”



The screenshot shows a window titled "Reports" with a table of report entries and several action buttons. A red arrow points from the text above to the "Create Disclosure Report" button.

#	New Info	Report Name	Level	Start Date	End Date	
1	Y	2010 First Quarter	State	01/01/2010	04/17/2010	0
2	N	2009 Year End Semi-Annual Ame...	State	07/01/2009	12/31/2009	0
3	Y	2009 Year End Semi-Annual Ame...	State	07/01/2009	12/31/2009	0
4	N	2009 Year End Semi-Annual	State	07/01/2009	12/31/2009	0
5	Y	2009 Year End Semi-Annual	State	07/01/2009	12/31/2009	0
6	Y	2009 Year End Semi-Annual	State	07/01/2009	12/31/2009	0
7	Y	2009 Mid Year Semi-Annual Ame...	State	01/01/2009	06/30/2009	0

Buttons visible in the interface:

- Create Disclosure Report
- Amend Report [Submitted]
- Edit Report [Unsubmitted]
- Update Selected Report
- Delete Report
- Create Informational Report
- View Report [not for submitting]
- Audit Report
- For SBOE Use
- Close

31 Reports Listed.

The following screen will be displayed:

The screenshot shows a window titled "Report Information" with the following fields and controls:

- Year:** 2010
- Filing Schedule:** State
- Previous Report Link:** 2010 First Quarter [1/1/2010 - 4/17/2010]
- Report Type:** Second Quarter
- Is Amendment:** No
- Report Period Dates:**
 - Start Date: 04/18/2010
 - End Date: 06/30/2010
 - Due Date: 07/09/2010
 - Submit Date: (empty)
- Fundraiser Activity:** Num of Fundraisers: 0
- Message text...** (empty)
- Optional Information:**
 - Show ALL Detailed Contributor Information (Optional)
 - Show ALL Detailed Expenditure Information (Optional)
- Account Summary List:**

Name	Code	Begin Balance	End Balance
TEST BANK	101010		
- Exempt Sale List:** (empty)
- Buttons:** Edit Summary Values, Edit Account, Reset Defaults, Ok, Close

Complete all yellow fields as follows:

- **Year:** Enter the year of the report
- **Filing Schedule:** Select your filing schedule from the drop down list. All party committees, Council of State candidates, legislative candidates, judicial candidates and district attorney candidates should choose "State." All candidates for county-level offices should choose "County." All candidates for municipal-level offices should choose "Municipal." Candidates for offices in special districts, such as soil & water conservation districts, should choose "Municipal" if the office is ordinarily on the ballot in an odd-numbered year and "County" if the office is ordinarily on the ballot in an even-numbered year. Political action committees, referendum committees, and legal expense funds registered with the State Board of Elections should choose "State;" those registered with a county board of elections should choose "County."
- **Previous Report Link:** Use the drop down list and select the last report in the cycle. Remember, if you have amended the last report you must select the amendment.
- **Report Type:** Use the dropdown list to select the report type
- **Report Period Dates:** Once you have selected the report type the dates will automatically populate
- **Fundraiser Activity:** Enter the number of fundraisers held this reporting period

Under the Account Summary List, highlight the bank account and select "Edit Account."

Report Information

Year: 2009, Filing Schedule: State

Previous Report Link: [No Previous Report] Edit Summary Values

Report Type: Mid Year Semi-Annual

Is Amendment: Yes (radio), No (radio)

Report Period Dates: Start Date: 01/01/2009, End Date: 06/30/2009, Due Date: 07/31/2009, Submit Date: []

Fundraiser Activity: Num of Fundraisers: []

Message text... Show ALL Detailed Contributor Information (Optional) [] Show ALL Detailed Expenditure Information (Optional) []

Name	Code	Begin Balance	End Balance
SAMPLE BANK	11		

Reset Defaults, Ok, Close, Edit Account

Add the beginning bank balance in the Begin Balance field and select "OK."

Report Account Summary

Account Information

Name: TEST BANK

Code: 101010, Begin Balance: [], End Balance: []

Ok, Cancel

Select "OK" once again on the Report Information screen.

You will now be back at the Reports screen, and you will see your report in that list:

The screenshot shows a window titled "Reports" with a table of reports and several action buttons. The table has columns for #, New Info, Report Name, Level, Start Date, End Date, and a numeric value. Below the table are buttons for "Create Disclosure Report", "Amend Report [Submitted]", "Edit Report [Unsubmitted]", "Update Selected Report", "Delete Report", "Create Informational Report", "View Report [not for submitting]", "Audit Report", and "For SBOE Use". A "Close" button is at the bottom right. A status bar at the bottom left says "32 Reports Listed."

#	New Info	Report Name	Level	Start Date	End Date	
1	Y	2010 Second Quarter	State	04/18/2010	06/30/2010	0
2	Y	2010 First Quarter	State	01/01/2010	04/17/2010	0
3	N	2009 Year End Semi-Annual Ame...	State	07/01/2009	12/31/2009	0
4	Y	2009 Year End Semi-Annual Ame...	State	07/01/2009	12/31/2009	0
5	Y	2009 Year End Semi-Annual	State	07/01/2009	12/31/2009	0
6	N	2009 Year End Semi-Annual	State	07/01/2009	12/31/2009	0
7	Y	2009 Year End Semi-Annual	State	07/01/2009	12/31/2009	0

You can now use the View Report (not for submitting) button to see the report. You should check the report to make sure all balances and totals are correct.

Next you should audit the report, which is covered in the topic Audit Report.

Your final step will be to save and send the report which is covered in the topic Save the Official Report.