

Campaign Finance Reporter Technical Bulletin Initialization of a new reporting year

1. When you are finished with data entry for the current year and have filed your year-end report:

Use the menu items: Tools/Initialize New Year.
Select "Final New Year Initialization".

Answer OK to the notice that both a preliminary and final initialization will be performed.

Click OK on the message that the preliminary initialization completed successfully.

Click Yes on the message box that asks if you are sure that you want to complete the initialization of the new year.

Click OK on the successful completion message.

Note: At this point, you are still working in the current (old) year. Close the application and re-start it. The new year will be at the top of the list of committee years that you may select.

If you complete this version of the new year initialization, stop here, you are done.

2. If you need to begin working in the new year before you have completed the current year:

This is a two-step process. You MUST complete the second step (Final Initialization) for your new year to be completely initialized.

Use the menu items: Tools/Initialize New Year.
Select "Preliminary New Year Initialization".

Answer Yes to the question "Do you want to proceed".

Click OK on the message that the preliminary initialization completed successfully.

Note: At this point, you are still working in the current (old) year. Close the application and re-start it. The new year will be at the top of the list of committee years that you may select.

A preliminary initialization creates the new database and copies entities to it. This process does **not** copy over ending cash balances, unpaid bills, loan balances, or other end of year data.

Step Two: If you perform a preliminary initialization you must remember to complete a final initialization once you complete work in the current (old) year. Complete the final initialization as described in section 1 above. Since you have already done a preliminary initialization, you will not see the messages discussed in section 1 that relate to the preliminary initialization.